

Item #170915K



Statement of Qualifications for

# Management Consulting City of Gainesville

In response to RFQ #CMGR-180051-GD  
February 8, 2018

Management  
Partners



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February 8, 2018

Ms. Gayle Dykeman  
Senior Buyer  
City of Gainesville  
Procurement Division  
200 East University Ave, Room 339  
Gainesville, FL 32601

Dear Ms. Dykeman:

The City of Gainesville has been striving to become more citizen-centered and over the last few years the community and City leaders have together developed 450 “big ideas.” Partnering with experienced and skilled consultants can help the City quickly achieve positive change in management, operations, organization structure, and process improvement.

Management Partners is providing our qualifications for the following areas identified in the RFQ:

- » Area 1 – Organizational Design
- » Area 2 – Human Resource Policy
- » Area 5 – Leadership
- » Area 6 – Executive Coaching

We are local government experts who have worked with leaders for more than 20 years to help them improve the way their governments function. We are focused on results and have a bias for action. Each project is customized to the unique circumstances of the agency and often incorporates the perspective of line employees who deliver service to residents on a daily basis.

Our team is excited about the potential of these projects and we look forward to discussing our approach and qualifications with you in more detail. We acknowledge receipt of addendum no. 1, issued February 1, 2018. Please let me know if there is any other information we can provide.

Sincerely,

A handwritten signature in black ink, appearing to read "Gerald E. Newfarmer".

Gerald E. Newfarmer  
President and CEO

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## Project Understanding and Approach

The City of Gainesville is developing a list of consultants with expertise in all aspects of city government. Gainesville is unique compared with other jurisdictions in Florida because its largest employer, the University of Florida, generates much of the operating income, as compared with tourism or being a retirement destination. In addition to providing the full range of city services, the City is responsible for a regional transit system, an airport, a golf course and a utility system. Creating a pre-qualified management consultant list will enable City managers to quickly address departments' consulting needs with the stated goal of becoming more citizen-centered.

Management Partners has extensive experience with similar work and is prepared to assist the City of Gainesville with Areas 1, 2, 5, and 6 of the scope of work as identified in the request for qualifications (RFQ). We make a commitment to quality and timely performance with each client we serve. Most of our projects include engaging residents or employees, benchmarking with peer communities, determining appropriate best practices, setting realistic implementation action plans, and working closely with the client. We are experienced and successful in consulting in the following areas:

- » Area 1 – Organizational Design
- » Area 2 – Human Resource Policy
- » Area 5 – Leadership
- » Area 6 – Executive Coaching

Within these areas, Management Partners can provide a variety of services, such as:

- » Facilitating strategic planning,
- » Facilitating teambuilding (including using assessment tools such as Myers Briggs and DiSC),
- » Providing implementation plans,
- » Conducting organization or program studies,
- » Analyzing business and financial programs and developing financial models,
- » Developing a program for and training on performance management/performance measurement,
- » Coaching and training,
- » Analyzing and developing policies and procedures,
- » Conducting process improvement studies, and
- » Providing other consulting services as needed.

The essentials of our project approach and methodology are summarized below.

### Holistic Project Management Approach

While each project has unique needs, our approach emphasizes engagement with your staff and leaders, taking into account the distinctive circumstances and leveraging of the things that are

already being done well, to craft an appropriate and customized plan for improvement. There are six distinct elements to our process:

- » *Listen.* We respect the fact that your managers, employees and stakeholders are best positioned to know what is working well and what needs improvement. Often, front-line staff have excellent ideas that they haven't been able to implement for various reasons. We use several tools, which can include individual interviews, focus groups, online surveys, workshops and team meetings to listen to your staff, leaders, elected officials, residents, or customers.
- » *Learn.* To best identify how to improve efficiency and effectiveness in your organization, we must first fully understand your organization, including its operating environment, the way it has worked historically and its service demands and opportunities. Using existing documents such as strategic plans, work plans, budgets, capital programs, comprehensive plans, master plans, staffing plans, codes, policies, or procedures, we drill down to the level necessary to provide context for our analysis.
- » *Diagnose.* Based on what we hear and see, we analyze relevant aspects of the agency, such as daily operations, organization structure, the use of technology, management and monitoring systems, and the degree to which performance measures and standards exist and are being used. We concentrate on how work is planned, managed and executed, knowing that most performance issues are caused by systemic problems.
- » *Compare.* For most projects, we look at industry standards and best practices from across the nation. Not every best practice or standard is appropriate for any given jurisdiction, so we take care in selecting those that will work well in your circumstances. Many projects also include peer benchmarking surveys to create a context for the level of investment and performance. We work with you to identify the right peer group, making sure the analysis is both relevant and appropriate.
- » *Identify Opportunities.* When the investigation and data gathering activities are complete, we analyze the information and identify changes that will increase efficiency and/or improve service delivery. Every human organization has opportunities for improvement. The challenge is to identify those that are realistic, cost-effective and will produce better service to the public.
- » *Implement Solutions.* Management Partners has a strong bias for implementation. Our work goes beyond providing good analysis to providing concise, actionable





recommendations. We also support implementation to help improve efficiency and realize cost savings, when appropriate.

## Ensuring a High-Quality Outcome

Management Partners goes to unusual lengths to ensure our work is of reliably high quality. Our reports and other deliverables are subjected to careful internal control processes so our deliverables meet your needs and are of excellent quality.

Before we develop a draft report, we meet with your project team to discuss our observations and preliminary recommendations to solicit your feedback and identify any implementation issues. Each deliverable undergoes a peer review process within the firm to see that it meets Management Partners' standard of excellence, with thoughtful analysis leading to clearly stated and actionable recommendations. In addition to our own high standards, we also survey each client when a project is complete to learn how we can improve.

## Achieving Results

Management Partners has worked for the majority of our clients on multiple occasions. They consistently tell us that they use our services on a variety of projects because our work provides implementation actions that accomplish their objectives. Management Partners is led by local government experts who know how to get things done, appreciate the difficulties and the constraints on local leaders, and understand the essential elements that effectively drive implementation. These elements include:

- » Creating a sense of urgency;
- » Engaged leaders;
- » Well-developed implementation planning;
- » Frequent communication with stakeholders;
- » Planned milestones and completion dates; and
- » Institutionalized management processes.

Implementation is effective only if there is an expectation and commitment to it. We use well-grounded management techniques to effectively shape organizational culture so that project goals can be realized.

## Example Work Plan

Although each project will be unique, many follow a similar plan of work. Based on our experience, we have prepared the following plan of work as an example of some of our project work.

### *Activity 1 – Start Project*

Management Partners will begin any project with a careful learning phase, starting with a planning meeting with appropriate City leaders to ensure we have a clear understanding of your objectives for the project. The purpose of the meeting is to understand the business concerns giving rise to the project, so the plan of work and schedule can be precisely tailored to your needs. In this initial meeting, we will discuss the schedule and our data requirements for

this assignment. Throughout the project we keep you informed of our progress, observations, and initial recommendations.

The project start-up activity forms the foundation of the relationship between Management Partners' team and City leaders. We know that the work associated with the project is in addition to the normal work of the organization. Our goal is to integrate our activities in a manner that is thoughtful and minimizes disruption to the City operations.

### ***Activity 2 – Conduct Interviews, Employee Survey, and Focus Groups***

During this activity Management Partners typically uses the techniques below to gather information from department leaders, managers, and employees. These techniques will allow employees to engage in sharing their perspectives about issues in the department and opportunities to innovate and improve.

- » **Gather Documentation.** Depending on the project's needs, we will request and analyze policies and procedures, budgets, contracts, performance metrics, studies, plans, charts, and other pertinent documentation to ensure we have a clear understanding of current operations.
- » **Conduct Interviews.** Management Partners usually interviews City or department staff, as appropriate, to learn about the organization's structure, staffing and work systems; understand strengths and weaknesses of each division; gain perspectives about the current culture; and hear ideas for improvement.

Depending on the project, we also may suggest conducting confidential customer interviews. Both internal and external customers have opinions about how business is conducted and often have suggestions for improvement. We find it is helpful to listen to their experiences and perceptions.

- » **Deploy Employee or Community Survey.** When appropriate, we use surveys as a way to collect information from a broad array of stakeholders (employees or others), in a way that allows for confidential responses and maximum participation. In many cases, surveys are designed to identify opportunities for improvement and ideas for increasing efficiency and effectiveness. We identify any barriers to participation in the survey, to ensure it is accessible to as many potential respondents as possible.
- » **Facilitate Employee or Community Focus Groups.** We frequently facilitate focus groups to better understand what was learned through the individual interviews and surveys. We facilitate 90-minute sessions as a free-flowing conversation, seeking reasons why the perceptions about the organization are what they are.

At the conclusion of our interviews and data collection, Management Partners creates a summary of major observations. The summary allows us to determine if the data we have gathered is sufficient, or whether additional data and information will be needed for Activity 3.

### ***Activity 3 – Analyze Results***

Next, we analyze the information collected during the first two activities. We generally begin by evaluating the current climate and creating baseline measures to compare against in the future. As we examine the survey, focus group, and interview themes, we identify opportunities for improvement based on the project goals.

We will gather any additional data raised at the end of Activity 2 and incorporate them into our analysis. Once completed, we will have identified significant issues and opportunities for improvement that will inform our benchmarking and best practices research in Activity 4.

### ***Activity 4 – Conduct Peer Benchmarking Survey***

Using criteria we establish in collaboration with City managers, we identify peer agencies. We develop a survey about operations, organizational structure, staffing and/or workload, as appropriate, and collect relevant data from the peers. We use this data to place the City in the context of similar agencies and provide benchmarks for comparison purposes. Where peer agencies have performed better, we investigate processes and policies they are using for consideration and applicability to Gainesville. In addition, we investigate best practices and industry standards from around the country to determine if any have practical application for the department.

At the conclusion of this activity, we prepare a memorandum with observations and preliminary recommendations. We then review it with the City's project staff to hear feedback and ensure that we identify any implementation barriers.

### ***Activity 5 – Report Results***

After reviewing observations and preliminary recommendations with staff, we prepare a written report in draft form. Reports usually include analysis of the information discussed above as well as actionable recommendations to address opportunities for improvement. We then provide a draft report for review by the City. At the conclusion of the review period we prepare the final report.

Reports prepared by Management Partners are rich in detail, with recommendations supported by quality analysis. We take pains to ensure that our analysis and subsequent recommendations are organized in an easy to understand format and presented in a positive manner.

We undertake several discrete steps to ensure quality control. The first is to prepare a draft report for managers to review to ensure that facts are accurate, and ideas are presented clearly. Management Partners retains responsibility for our professional recommendations, but we expect that vetting the draft report with management improves its utility. In addition to vetting the report for accuracy the draft review provides an opportunity to discuss recommendations and to identify implementation issues. Management Partners is committed to recommending actions that result in meaningful operational improvements and can be implemented in the real world. Once comments have been received, the final project report will be prepared, peer reviewed, and then transmitted to you.

### ***Activity 6 – Support Implementation***

Upon completion of the report and recommendations, Management Partners prepares a draft Implementation Action Plan. The Action Plan serves as an executable roadmap that details the specific steps needed to accomplish each of the recommendations included in the report based on actual priorities of the City or department. It also includes a suggested priority for each recommendation (short-, medium- and long-term), and assigned responsibility.

### **General Timeframe**

Different types of projects and scopes require different amounts of time depending on the size of the project (i.e., one department, all-city), analysis, and community or staff engagement. In general, our projects require time as shown below.

<b>Project Type</b>	<b>Months</b>
<b>Management or strategic planning, including strategy implementation and execution</b>	Two to eleven
<b>Program planning for existing or future programs, including needs assessment, goal or impact statements, plan/strategy development, implementation and method for documenting results</b>	Two to eight
<b>Program evaluation to assess effectiveness of city operations and program planning including areas related to policy analysis, management, financial and administrative services</b>	Three to twelve
<b>Studies, analyses, scenario planning, forecasting, and reports relating to the mission-oriented business programs or initiatives</b>	One to twelve
<b>Qualitative and quantitative research methods, data analysis and performance measurement, including integrating data and measurement into city management functions and policy development</b>	Five to eighteen
<b>Executive/management coaching services</b>	Six to eighteen
<b>Customized business training as needed to successfully perform/complete a consulting engagement</b>	As needed
<b>Training and education services, including customized curriculum development to support internal training needs and assessments such as Myers Briggs and DiSC</b>	Two to four
<b>Policy and regulation development assistance</b>	One to nine
<b>Process and productivity improvement, including Human Centered Design, Agile, Lean, Six Sigma, Continuous Improvement and related methodologies</b>	Three to fourteen
<b>Advisory and assistance services</b>	As needed

## Proposed Project Staff

Management Partners has a strong project team that is well qualified to complete this work for Gainesville. These projects will be a top priority for Management Partners and our team members will be available in whatever capacity and with whatever availability will contribute to the success of the projects. Jerry Newfarmer is the President and CEO of Management Partners. He and Kevin Knutson will be the principals for our work with the City and will oversee the substantive work of each project. Amy Paul and Wayne Chapman will serve as senior consultants and will be responsible for the execution of each project and the functional responsibilities listed in the RFQ. They will be supported by consultants Nancy Hetrick, Greg Horn, Jacquelyn McCray, Francine Ramaglia, and Jan Goldstein. Management Partners will draw from our subject matter experts, also consultants depending on the project. Sam Lieberman will serve as junior consultant on the project. We have several employees in our Cincinnati office to provide program support.

Francine Ramaglia, Bob LaSala, Susan Boyer, and Dick Braun live in Florida full time and Greg Horn lives part-time in Florida. Kevin Knutson spent 17 years working for Coral Springs, Florida and the team has approximately 75 years combined of management in Florida jurisdictions. Below is a list of Florida clients within the past 10 years.

Client	Project	Year
<b>Alachua County</b>	Detention Facility Consultation	2011
<b>Boynton Beach</b>	Process Improvement (ongoing)	2018
<b>Clearwater</b>	Employee Engagement Survey (ongoing)	2015-2020
<b>Clearwater</b>	Internal Services Survey (ongoing)	2016-2018
<b>Davie</b>	Strategic Planning (ongoing)	2018
<b>Deerfield Beach</b>	Strategic Planning (ongoing)	2017
<b>Delray Beach</b>	Development Review Process Study	2016
<b>Fort Lauderdale</b>	Human Resources Operations Review	2014
<b>Fort Lauderdale</b>	Public Works Succession Planning	2016
<b>Gainesville</b>	Management Retreat	2008
<b>Kids Central</b>	Analysis of Positions and Processes	2012
<b>Lakeland</b>	Benchmarking and Organization Review	2016
<b>Lantana</b>	Public Works Organization Review	2015
<b>Largo</b>	Development Review and Permitting Process Improvements	2013, 2016
<b>Margate</b>	Strategic Planning	2014
<b>Melbourne</b>	Police Operations Assessment	2016
<b>Miami</b>	Police Onboarding Process Analysis	2016
<b>Miami-Dade County</b>	Library Services Study (with Godfrey's Associates)	2013
<b>Oakland Park</b>	Citywide Organization Review (various projects)	2016-2019
<b>Parkland</b>	Strategic Planning (ongoing)	2015-2018
<b>Pinellas County</b>	Partnership Agreement (various projects)	2013-2014
<b>Port Orange</b>	Strategic Planning	2016
<b>Port St. Lucie</b>	Performance Management Training (ongoing)	2018
<b>Sanford</b>	Citywide Organization Review	2014
<b>Sanford</b>	Feasibility study of Public Works and Utilities Merger	2016
<b>Sarasota County</b>	Utilities Organization and Financial Review	2013 and 2017-2018

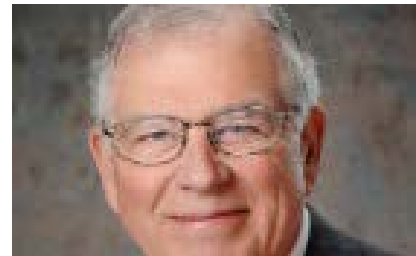
Client	Project	Year
South Miami	Department Organization Reviews (ongoing)	2017-2022
Tamarac	Public Services Organization Review	2016
Tavares	Performance Measurement Training	2015
West Palm Beach	Fleet Outsourcing Study, Fleet Services Expansion	2014, 2018
West Palm Beach	Parks and Recreation Study	2015
West Palm Beach	Strategic Planning	2016-2017

## Team Qualifications

The qualifications of each principal, senior consultant and consultant are briefly summarized below. Complete resumes for each person are included in Attachment A of this response. In addition, the table at the end of this section provides a list of senior consultants, consultants, and junior consultants and their areas of expertise.

### Jerry Newfarmer, President and CEO

Jerry founded Management Partners in 1994 after many years of public management leadership in California and Ohio. He is a national leader in local government performance management, and he has led his firm to nationally recognized expertise in quality leadership of all forms of local government. Jerry served as city manager in Fresno and San Jose, California; and Cincinnati, Ohio. He was assistant city manager of Oakland, California, which was the chief operating officer role. He has been a key presence in the International City/County Management Association and was team leader of the State-Local Relations Team of the National Performance Review. He currently serves as Executive Director of the Large Cities Executive Forum and has received the ICMA designation as a Credentialed Manager.



### Kevin Knutson, Regional Vice President

Kevin has more than 20 years of experience directing local government strategic planning, communications, and budgeting functions, with a particular emphasis on performance measurement and process improvement. He was part of a team that implemented quality management practices in Coral Springs that led to the City being the first local government to earn the Malcolm Baldrige National Quality Award. For eight years, he directed strategic planning, budgeting, and performance management for two large cities. He is recognized as a Credentialed Manager by ICMA and was 3CMA's "Communicator of the Year" in 2011.

### Amy Cohen Paul, Corporate Vice President

Amy has more than 30 years of experience in local government management, performance measurement and strategic planning. She assists public agencies in conducting organizational reviews, implementing organizational improvements, identifying alternative service delivery methods, designing and



implementing performance management systems, and developing strategic and business plans. She also is a skilled facilitator and trainer. Amy was part of the original management team of the International City/County Management Association's Center for Performance Measurement and she helped produce ICMA's training materials on outcome measurement.



### **Wayne Chapman, Partner**

Wayne has more than 35 years of experience as a practicing public manager and nearly 20 years of experience assisting local governments as a consultant for Management Partners. Wayne is a nationally-recognized expert in municipal finance, housing and community development. Wayne's consulting engagements have included comprehensive staffing reviews, organizational analyses, process improvement projects, management information systems, performance measurement, training, financial modeling and forecasting, and cost recovery modeling. Wayne led our recent projects for the City of Covington, Kentucky, and Pinellas County, Florida. He has been with Management Partners since 1994, after a career of public service including the positions of city manager of Aspen, Colorado and Schenectady, New York, and as budget director and director of neighborhood housing and conservation for the City of Cincinnati, Ohio.

### **Nancy Hetrick, Partner**

Nancy is an experienced facilitator with expertise in strategic planning, team building, and facilitating problem-solving and process improvement initiatives. In addition, she is skilled in the areas of performance management, succession planning, organizational and process improvement, and budget development. Nancy led the County of San Mateo's Outcome-Based Management program and has supported local government clients with the design and implementation of performance measurement systems. Nancy is an excellent facilitator and trainer. She has developed curriculum and conducted training on a wide variety of topics and routinely facilitates priority-setting and team building workshops for cities, counties and non-profit boards. Nancy is certified to administer the Myers-Briggs Type Indicator assessment instrument. Since her return to Management Partners in 2006, she has led projects with local governments including the Bay Area cities of Rohnert Park, Redwood City, San Carlos, Fairfax, Orinda, Merced, Martinez, San Jose and Santa Cruz; the Sacramento Area Council of Governments; the Peninsula Library Partnership; and the Bay Area Counties of Alameda, San Mateo, Marin, Monterey, and Santa Clara.



### **Greg Horn, Special Advisor**

Greg joined Management Partners in 2017 after nearly four decades in local government, all of them spent as a chief executive officer. Horn served most recently as city manager in Centerville, Ohio, a position he held for 25 years. In Centerville, Greg managed a community of 25,000 residents, 700 businesses, 250 employees and

an annual budget of \$50 million. Prior to Centerville, Greg served for seven years as city manager in Tipp City, Ohio, a rapidly growing community with its own water, sewer and electric distribution systems. He was also village manager in Minerva, Ohio and city administrator in Hermann, Missouri. Greg is past president of the Ohio City/County Managers Association and the Dayton Area Managers Association.

### **Jacquelyn McCray, Ph.D., Senior Manager**

Jacquelyn is a professional planner and a certified economic development professional. She has worked on numerous projects involving development review, organizational and workflow analyses, performance measurement, strategic benchmarking and planning, and service sharing. Jacquelyn has expertise in process improvement and re-engineering of local government development review processes involving multiple departments and agencies. She also has excellent interview and facilitation skills, and frequently conducts leadership, employee and stakeholder focus group meetings. Before joining Management Partners, Jacquelyn held positions as a budget analyst, project manager and land-use manager with the City of Cincinnati. After concluding her tenure with Cincinnati, she served as vice chairperson and member of the Cincinnati City Planning Commission for nine years. Jacquelyn is a member of the American Institute of Certified Planners (AICP).



### **Francine Ramaglia, CPA, AICP, Senior Manager**

Francine is a senior manager with over 25 years in local government. She is a generalist with highly specialized skills, including being a certified planner, a Certified Public Accountant (CPA), and an International City/County Management Association (ICMA) Credentialed Manager. During her local government career, Francine was an assistant city manager for the cities of Delray Beach and Wellington, Florida. She has served as acting director of numerous departments and community agencies, including as the director of Planning, Zoning and Building in Delray Beach. Her primary areas of responsibility have included community development and neighborhood services; strategic and long-range planning; economic development; public affairs and special events; communications and technology services; human resources; and financial and administrative services. Prior to joining Wellington, she was a senior manager with KPMG, an international accounting and consulting firm, where she managed annual audits of several municipalities and special districts. Francine lives in southeast Florida.

### **Jan Goldstein, Senior Manager**

Jan Goldstein worked with and in the public sector for more than 18 years. Her expertise includes serving as department director with the Indianapolis Airport Authority and managing a federally funded non-profit organization. Jan is skilled in all of the support activities of government: strategic and long-range planning;





process analysis and improvement; training; and writing operations and personnel manuals. She has specific expertise in fleet, facilities, contract management, and parking operations and management including revenue control. Jan’s consulting engagements have included shared services reviews, organizational and facilities assessment analyses, executive recruitment, and process improvement projects. She has helped many clients implement innovative techniques that resulted in enhanced business practices and increased productivity.



**Sam Lieberman, Senior Management Advisor**

Sam is responsible for conducting complex financial and operational analyses to support many different types of clients including organization reviews, process improvement studies, service sharing projects, and financial planning and budgeting studies. He has helped facilitate strategic planning and process improvement workshops, developed and analyzed strategic planning community input surveys and employee satisfaction and internal services surveys, conducted research and analyses, assisted in the development of performance measurement systems, and directed benchmarking research. Sam recently co-authored an article on how government can take advantage of data analytics programs that appeared in PM Magazine. He also collects, analyzes, and reports data for the annual Southwest Ohio Fire Benchmarking Project. Recent clients whom he has served include Berkeley, Carson, San Bernardino, Orange County, Santa Clara Valley Water District, and Zone 7 Water Agency in California; Hartford, Mansfield, and New Haven, Connecticut; Kenton County and Florence, Kentucky; Kansas City, Missouri; DeKalb County, Georgia; Pinellas County and Largo, Florida; Phoenix, Arizona; and Hamilton County, Fairfield, Mason, Montgomery, and Westerville, Ohio.

Management Partners has many subject matter experts as well as experienced generalists. The table below includes key staff and their areas of expertise.

	General Government	Community Development	Economic Development	EMS/Fire	Police	Budget/Finance	Human Resources	Information Technology	Parks, Recreation and Neighborhood Services	Project Management	Fleet	Public Works	Purchasing	Transportation	Utilities
<b>Susan Barnes</b>	✓		✓												
<b>James Biery</b>												✓		✓	✓
<b>Steven Bocian</b>	✓									✓					
<b>Susan Boyer</b>	✓			✓	✓	✓			✓	✓		✓	✓	✓	✓
<b>Dick Braun</b>				✓											
<b>Craig Bronzan</b>		✓							✓						

	General Government	Community Development	Economic Development	EMS/Fire	Police	Budget/Finance	Human Resources	Information Technology	Parks, Recreation and Neighborhood Services	Project Management	Fleet	Public Works	Purchasing	Transportation	Utilities
Bill Buchanan	✓	✓	✓			✓	✓					✓		✓	✓
Mike Casey	✓	✓	✓	✓	✓	✓			✓	✓		✓	✓		✓
Shauna Clark	✓					✓	✓								
Fay Dupuis	✓						✓								
Greg Fassler											✓				
Hossein Golestan						✓									
Pat Healy	✓														
Julie Hernandez	✓						✓								
Greg Horn	✓	✓	✓		✓	✓	✓		✓			✓			
Susan Hoyt	✓	✓	✓	✓	✓	✓			✓	✓		✓	✓		✓
David Jensen					✓			✓							
David Krings	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓
Bob LaSala	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓
Bob Leland						✓									
David Mansfield												✓			✓
Dan Marks		✓	✓												
Mary Neilan	✓						✓								
Patrick Oliver				✓											
Martin Pastucha	✓											✓		✓	✓
Doug Plunket	✓	✓	✓	✓	✓	✓			✓	✓		✓	✓		✓
Joe Polisar					✓										
Ron Prince				✓											
David Rudat				✓											
Gary Scott									✓						
Jim Steele						✓									
Mary Welch							✓								

## Qualifications of Management Partners

Management Partners was founded in 1994 with a specific mission to help local government leaders improve their service to the public. Since then we have worked with cities, counties, towns, and special districts of all sizes across the United States to help them work more effectively and run more efficiently. Except for five administrative support staff, all of Management Partners personnel work on projects, including 12 principals, 49 senior consultants (special advisors), 11 consultants (senior managers) and 11 junior consultants (senior management advisors) totaling 87 employees. Their training and expertise is described in the Proposed Project Staff section. We currently have over 150 open projects and will probably have a similar number during our work with Gainesville. We communicate regularly with our clients and deliver our projects on time and within the budget.

### Why Management Partners?

We offer a balance of perspectives with a practitioner's bias and a proven track record of successful consulting engagements. This experience gives us a sensitivity that produces positive outcomes. We are proud to say that as a result of our quality work, many of our clients ask us to complete subsequent assignments. Ask our clients and they'll tell you:

<b>We Know Local Government</b>	Our associates have served in local governments, so we have a deep understanding of the operating and political environments in which you work.
<b>We Take a Collaborative Approach</b>	We consider ourselves part of your team and strive to ensure our work supports your overall corporate strategy and goals.
<b>We Have Extensive Experience</b>	Each of our more than 80 associates is an expert in one or more service areas, and our firm has assisted hundreds of jurisdictions in 42 states.
<b>We Have Developed Proven Methodologies</b>	We understand the importance of a holistic approach to improving organizations, using field-tested techniques for each aspect of the work.
<b>Our Work Plan Is Tailored to Your Needs</b>	Each of our projects is individually tailored to our client's unique needs, starting with a careful learning process.
<b>We Take Pride in the Quality of Our Work</b>	Our internal processes ensure first-rate, complete staff work and adherence to the highest ethical standards in public service.
<b>We Are Focused on Implementation</b>	As practitioners, our recommendations make practical sense and are designed for implementation.

## Taking a Collaborative Approach

Success in the public sector requires an approach that is inclusive, collaborative, respectful of differing viewpoints, and appreciative of democratic self-government, with its focus on extensive input and diverse opinions. This philosophy governs our work, and it will be a key element in how we approach this work for Gainesville.

We view each project as an opportunity to design the best possible approach to achieve the desired results. At the beginning of our partnership we work with you to design a work plan and schedule that takes into account the needs of your organization. We are sensitive to the impact a project can have on busy staff and plan our work accordingly to minimize disruption.

We often involve employees throughout the enterprise in the project because they are in the best position to know what works. When they have a chance to express their concerns and share their ideas they are more likely to support the changes that need to be made to improve.

## Recognizing that Every Organization Is Unique

Because we have partnered with hundreds of local governments across the country, we understand that every place has unique circumstances, challenges and opportunities. As a result, we do not use a cookie-cutter approach to our projects. Instead, we start by talking with you to understand what makes your organization different. Then we develop recommendations that make sense given your resources, history, goals and circumstances.

## From Recommendations to Implementation

Management Partners has a strong bias for action. Our reports and resulting recommendations become tools for setting priorities and for developing department and division work plans. After completing the project report, we prepare a draft Implementation Action Plan, incorporating each recommendation in the project report. The draft action plan lays out the steps required for implementation, assigns responsibility for action, and identifies a priority level (immediate, near or long term) for initiating each recommendation.

The action plan is prepared as a draft and becomes final once directors and managers integrate the action steps into their plans of work and identify actual dates for planned completion. The action plan offers an important management tool for implementation of the work reflected in the project report.

## Services to Support Local Government Leaders

Management Partners' services include everything required to support local government leaders. The range of our services includes:

- » *Organization Assessments* – Analyzing the organization (including structure, staffing, business processes, policies and resources) to identify improvements to an operation's efficiency and effectiveness.

- » *Organization Development* – Developing organizational capacity, a key to high-performance organizations, through executive coaching, customer service training, employee and customer surveys, and conflict management workshops.
- » *Performance Management* – Systematically tracking the performance of the enterprise, including performance measurement, process management, performance budgeting, employee performance evaluation, and strategic and process benchmarking.
- » *Process Improvement* – Critically examining specific business processes through which internal or external customers are served to identify opportunities for improvement using process mapping, performance improvement workshops, and other quality tools.
- » *Financial Planning, Budgeting and Analysis* – Managing the financial affairs of the enterprise, performing multi-year financial planning, and developing a well-structured, transparent budgeting process supported by thorough analysis.
- » *Strategic and Business Planning* – Setting the direction for the enterprise and preparing business plans required to achieve desired outcomes.
- » *Sharing and Consolidation of Services* – Improving the cost-effectiveness and quality of service delivery by partnering with other units of government through sharing or consolidation.
- » *Interim Management Services* – Assisting government leaders by providing executive staff during transitional periods. Our approach combines continuing services along with analyzing organizational effectiveness to provide a solid foundation for a new permanent employee.
- » *Executive Recruitment* – Identifying top quality leaders who are a good fit for your organization and your community.

## Your Partner

Management Partners has helped hundreds of local government leaders in 42 states improve their service to the public. The work we do is not an academic exercise; it is grounded in the real world of customer service and accomplishment in the public sector. We will work closely with you to produce the desired results, focused on achieving your goals and mission.

## Experience and References

Management Partners specializes in providing quality consulting to local government clients. In addition to the references and project lists below, our website, [managementpartners.com](http://managementpartners.com), has information about our past clients, which includes hundreds of jurisdictions in 42 states. You are welcome to contact any of them about our performance. We believe our track record completing similar projects on time and on budget, with quality deliverables specifically designed to be implemented, makes Management Partners well qualified to successfully complete this work for Gainesville.

The firm has extensive experience helping improve both the efficiency and effectiveness of all local government services. We have undertaken organization reviews and improvement projects in virtually every type of local government service, including reviews of entire governments as well as selected studies of individual departments and functional activities.

Management Partners has conducted hundreds of different types of projects. We have provided references with contact information for projects closely matching what is described in the RFQ. In addition, after the references, we have listed many other similar projects.

## Strategic and Management Planning

Management Partners has facilitated the development of strategic plans for the following jurisdictions.

Parkland, Florida	
<p>Ms. Nancy Morando            Finance Director            6600 University Drive            Parkland, Florida 33067            (954) 753-5040            nmorando@cityofparkland.org</p>	<p><b>Strategic Plan 2017</b>            For the third consecutive year, Management Partners planned and facilitated two strategic planning workshops with the City Commission to update the mission, goals, and strategic objectives for the City. We also conducted a staff workshop and one-on-one meetings to develop action plans and identify "management in progress" that support achieving the City's strategic goals. The overall plan was adopted by the Commission and staff implemented the action plans developed through this process.</p>
Port Orange, Florida	
<p>Mr. Michael Johansson            City Manager            City of Port Orange            1000 City Center Circle            Port Orange, FL 32129            (386) 506-5501            mjohansson@port-orange.org</p>	<p><b>Strategic Planning</b>            Management Partners assisted Port Orange city leaders with the development of a five-year strategic plan. Our work included individual interviews with the Mayor and council members, focus groups and community input session so residents and stakeholders could provide ideas and suggestions about the future of the city. After data gathering and analysis, Management Partners facilitated a strategic planning retreat with city leaders to develop goals and strategies. Once the strategic plan was adopted, Management Partners facilitated a session with department directors to prepare an Implementation Action Plan to achieve the goals.</p>
West Palm Beach	
<p>Ms. Dorritt Miller, CPA, CIA, CGFM            Deputy City Administrator            City of West Palm Beach            401 Clematis Street            West Palm Beach, FL 33402</p>	<p><b>Strategic Planning</b>            Management Partners facilitated a process to assist the Mayor and City Commission in developing a strategic plan that established the City's mission, values, and strategic priorities. Working with staff, we also identified performance</p>

(561) 822-1400 dmiller@wpb.org	metrics for each department for use in the City's budget process that identified outcomes, a subset of which was used as key performance indicators in the strategic plan. In addition, we assessed the overlap between the City's operational performance metrics and measures being collected for the City's STAR Communities effort. In October of 2017 we conducted a commission workshop to update the plan.
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In addition to the references above, we facilitated strategic planning for the following jurisdictions.

- » Acacia Adult Day Services, California
- » American Canyon, California
- » Axis Community Health, California
- » Benicia, California
- » Bladensburg, Maryland
- » Brentwood, California
- » Cypress, California
- » Deerfield Beach, Florida
- » El Cerrito, California
- » El Segundo, California
- » Fresno County Fire Protection District, California
- » Garden Grove, California
- » Green Township, Ohio
- » Hillsborough, California
- » Kansas City Area Transportation Authority, Missouri
- » Mansfield Downtown Partnership, Connecticut
- » Margate, Florida
- » Modesto, California
- » Monterey County, California
- » Montgomery, Ohio
- » Morgantown, West Virginia
- » Napa, California
- » Newport, Rhode Island
- » Pacific Library Partnership, California
- » Parkland, Florida
- » Peninsula Family Service, California
- » Pleasanton, California
- » Pomona, California
- » Port Chester, New York
- » Port Orange, Florida
- » Rohnert Park, California
- » Roseville, California
- » San Joaquin Valley Library System, California
- » San Pablo, California
- » Santa Ana, California
- » Santa Barbara County, California
- » Soquel Creek Water District, California
- » South Bay Cities Council of Governments, California
- » South San Luis Obispo Sanitation District, California
- » Stockton, California
- » Tustin, California
- » Ventura County General Services Agency, California
- » West Palm Beach, Florida
- » Wichita, Kansas

## Organizational Analysis and Studies

Management Partners has conducted almost 100 organization analyses, assessing the organizational and operational health of individual departments and entire local governments. Some references and a list of our most recent clients follows.

Dallas County, Texas	
<p>Mr. Jonathon Bazan Assistant County Administrator Dallas County 600 Commerce Street, 9<sup>th</sup> Floor Dallas, TX 75202 (214) 653-7327 jonathon.bazan@dallascounty.org</p>	<p><b>Fleet Services Assessment</b> Management Partners was engaged by Dallas County to conduct a comprehensive fleet services assessment. Through our assessment, we identified over 30 opportunities for improvement in fleet and equipment management practices. Some recommendations included ways to reduce fleet size and optimize efficient use of the fleet, establish a realistic shop labor rate to recover the actual costs of the service, change how data are collected and reported to be used for management decisions, establish a preventive maintenance program, improve management and staffing of fleet services, improve the use of technology to manage operations, and evaluate using a contract to provide parts more efficiently.</p>
Scotts Valley, California	
<p>Ms. Jenny Haruyama City Manager One Civic Center Drive Scotts Valley, CA 95066 (831) 440-5600 jharuyama@scottsvally.org</p>	<p><b>Organization Analysis and Finance Department Assistance</b> Management Partners conducted an organization scan and is providing ongoing support to the budget and finance functions for the City. The Citywide scan revealed an organization committed to quality customer service and a dedicated workforce, but lacking in systems and technology, professional growth opportunities (particularly at the management level) and consistent management practices. Key recommendations included developing a fiscal sustainability plan to address a significant financial gap, conducting a citywide fee study, stabilizing staffing by filling key vacancies and implementing succession planning strategies, and prioritizing investment in technology. Management Partners has also been active in supporting the professionalization of the finance and budget functions. We prepared a five-year forecast model for operating and capital improvement project costs, developed new budgeting approaches that engaged department managers in the budget development process, and are assisting with the development of a financial sustainability plan.</p>
Tamarac, Florida	
<p>Ms. Diane Phillips Assistant City Manager 7525 NW 88th Avenue Tamarac FL 33321 (954) 597-3510 Diane.Phillips@tamarac.org</p>	<p><b>Public Services Department Organization Structure Review</b> Several years ago, Tamarac merged its Public Works Department and Public Utilities Department. The City Manager felt it was an appropriate time to determine whether the intended improvements had been realized and if not, what could be done to optimize the current organizational structure. The project also included an analysis of the culture of the department and recommendations for addressing any cultural issues needing improvement. We provided recommendations on changes to the organization structure and management systems (staff meetings,</p>



	work planning processes, and budgeting) to improve integration of the functions within the department.
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The list of clients for whom we’ve conducted organization analysis is from 2017. We have conducted 98 organization analysis over the past six years.

- » Cayucos Elementary School District, California
- » Clearwater, Florida
- » Dallas County, Texas
- » Dallas, Texas
- » Dublin, California
- » Green Township, Ohio
- » Half Moon Bay, California
- » Hayward Area Recreation District, California
- » Hebron, Ohio
- » Josephine County, Oregon
- » Las Vegas, Nevada
- » Los Altos Hills, California
- » Los Banos, California
- » Martinez, California
- » Metropolitan Transportation Commission, Sacramento, California
- » Miami-Dade County, Florida
- » Modesto, California
- » Orange County Employees Retirement System, California
- » Rolling Hills Estates, California
- » Sacramento, California
- » Santa Clara, California
- » Santa Clarita, California
- » Santa Maria, California
- » Scotts Valley, California
- » South Gate, California
- » West Cities Police Communications, California

## Financial Forecasting and Planning

Our work for clients has ranged from developing models for internal use by staff, to council presentations regarding forecasted outcomes, to full-on strategy development.

<b>Hayward Area Recreation District, California</b>	
Mr. Paul McCreary General Manager Hayward Area Recreation and Park District 1099 "E" Street Hayward, CA 94541 (510) 881-6710 McCP@HaywardRec.org	<b>Ten-Year Financial Forecast</b> Management Partners prepared and presented a ten-year financial forecast for this large special district. The forecast incorporated rising pension costs, a likely recession, and the impact of a significant new voter-approved bond program for capital projects. The forecast allowed for modifications to assumptions during presentations and identified the magnitude of looming financial challenges. The forecast was favorably received by staff, the Board of Directors and labor union representatives and is now updated twice a year.
<b>Independence, Missouri</b>	
Mr. Zach Walker City Manager 111 E Maple Ave Independence, MO 64050 (816) 325-7170	<b>Financial Risk Assessment and Utility Management Audit 2017</b> The City of Independence’s Department of Power and Light was at a crossroad. Its generating capacity was within five years of the end of its economic life and many of the senior leaders were eligible to retire. Management Partners was engaged to perform a

<p>zwalker@indepmo.org</p>	<p>management audit and analyze the long-term financial sustainability and impact on rates of various capital improvements. We analyzed and enhanced the department’s financial models, recommended financial condition targets to achieve low-cost access to capital markets, analyzed the impact of planned capital improvements on rates, and recommended improvements to department operations. The City of Independence accepted and approved the report and is implementing the recommendations in accordance with the action plan provided by Management Partners.</p>
<p><b>New Orleans, Louisiana</b></p>	
<p>Mr. Dwight Norton        Urban Mobility Policy Advisor        1300 Perdido Street        New Orleans, LA 70112        (504) 658-7677        dnorton@nola.gov</p>	<p><b>Regional Transit Authority Budget Review 2015-2017</b>        The New Orleans Regional Transit Authority provides public and para-transit to Orleans and Jefferson Parishes through buses, streetcars, and ferries. The governing board of the authority is appointed by the Mayor of New Orleans and Jefferson Parish Commission. All daily transit operations and administrative support services are provided through a contract with a private vendor. Management Partners was engaged by the City of New Orleans Mayor’s Office to review the policies and protocols used by the authority to oversee the vendor and govern the provision of public transit in the two parishes. Following detailed analysis of the contract and service provides, we delivered a written guide for oversight management and governance. The guide contained 62 recommendations for improving vendor oversight and management, and also addressed transparency and effectiveness of board governance. The Authority hired an executive director who has been tasked with implementing the recommendations in the report.</p>

Management Partners provided expert recommendations and usable modeling for financial departments and forecasts to the following clients.

- » Anaheim, California
- » Benicia, California
- » Berkeley, California
- » Brentwood, California
- » Campbell, California
- » Daly City, California
- » Davis, California
- » Delaware County, Ohio
- » El Monte, California
- » Fremont, California
- » Fresno, California
- » Gallup, New Mexico
- » Gateway Cities Council of Governments, California
- » Gilroy, California
- » Housing Authority of Santa Clara County, California
- » Hayward Area Recreation and Park District, California
- » Independence, Missouri
- » Inglewood, California
- » Kansas City, Missouri
- » Lathrop-Manteca Rural Fire District, California
- » Long Beach, California

- » Maricopa County, Arizona
- » Midpeninsula Regional Open Space District, California
- » Millbrae, California
- » Morro Bay, California
- » New Orleans, Louisiana
- » Norfolk, Virginia
- » Oakley, California
- » Oxnard, California
- » Richmond, California
- » Riverside, California
- » Rohnert Park, California
- » Ross, California
- » San Bernardino, California
- » San Jose, California
- » Santa Ana, California
- » Santa Clara, California
- » Stockton, California
- » Tracy, California
- » Yuma County, Arizona

## Performance Management

Management Partners has provided direct assistance to many jurisdictions in the development and implementation of customized performance management systems, including the following.

Huron County, Ohio	
<p>Mr. Tim Hollinger Executive Director thollinger@huroncoHealth.com</p> <p>Ms. Julia Armstrong Account Clerk/Deputy Registrar/QI Coordinator jarmstrong@huroncohealth.com (567) 244-3223</p>	<p><b>Public Health Performance Management Review 2017</b></p> <p>Management Partners was hired to assist the leaders in the Huron County Public Health identify appropriate and necessary performance metrics for operations in four program areas: Administrative Services, Community Health, Environmental Health and Medical. We determined the best sources for the data collection; created effectiveness, efficiency, workload and output measures; prepared a data collection template; and recommended software to support an agency performance management initiative.</p>
Sacramento, California	
<p>Mr. Howard Chan City Manager 915 I Street, Fifth Floor Sacramento, CA 95814 (916) 808-7488 hchan@cityofsacramento.org</p>	<p><b>Multiple Projects</b></p> <p>Management Partners has conducted a variety of projects for Sacramento. The most recent was a management system review, which involved all city executives and focused on creating an explicit management system. After identifying processes that are working effectively and those processes that could work better, the City initiated several improvements, including launching a comprehensive performance measurement system. Management Partners recently concluded supporting implementation of the performance measurement program, which included providing data analytics training and helping departments identify meaningful performance measures.</p> <p>Management Partners has also completed citywide and department-specific organization reviews that rely on a variety of analytic tools, conducted fee studies, and provided analytical and project management assistance to develop significant cost savings in four focus areas identified by the City: Public Works and Utilities Departments, Parks and Recreation, Mayor/City Council, and</p>

	<p>Purchasing and Contracts. High-level recommendations and potential savings assessments were provided to the City in a short timeframe to meet budget needs. Proposed savings were based on best practices and Management Partners’ experience in helping local governments reduce costs. Estimated savings ranged from \$770,000 to \$1,577,000 for the General Fund and from \$1,898,000 to \$2,426,000 to non-General Fund operations.</p>
<b>Santa Monica, California</b>	
<p>Mr. David Martin          Director of Planning and Community Development          City of Santa Monica          1685 Main Street          Santa Monica, CA 90401          (310) 458-2275          david.martin@smgov.net</p>	<p><b>Performance Measurement</b>          The goal of the project was to develop program-level and executive performance measures. After providing training and consulting with Planning and Community Development division and program managers, Management Partners collaborated about appropriate measures that will assist with management decisions, demonstrate how resources are being used, and show progress toward goals. Management Partners’ report provided a recommended system of organizational performance measurement, including a summary of the process used to develop performance measures for department programs and services. It provides a recommended format for data collection and periodic reporting to the department director, city manager, Mayor and City Council and the public.</p>

Management Partners has helped clients review their performance management system, as well as those that need to have a complete performance management system developed (as well as training for staff).

- » Alameda, California
- » Arlington County, Virginia
- » Benicia, California
- » DeKalb County, Georgia
- » Columbus, Georgia
- » Des Moines, Iowa
- » Fairfield, Ohio
- » Florence, Kentucky
- » Fort Worth, Texas
- » Huron County, Ohio
- » Kansas City, Missouri
- » Kent, Washington
- » Lawrence, Kansas
- » Lexington, Massachusetts
- » Louisville, Kentucky
- » Marin County, California
- » Montgomery, Ohio
- » Monterey County, California
- » Olathe, Kansas
- » Orange County, California
- » Overland Park, Kansas
- » Rockville, Maryland
- » Sacramento, California
- » San Bernardino County, California
- » San Jose, California
- » San Mateo County, California
- » San Mateo, California
- » Santa Monica, California
- » Springdale, Ohio
- » Tavares, Florida
- » Troy, Michigan
- » Unified Government of Wyandotte County/Kansas City, Kansas
- » Westerville, Ohio
- » Wichita, Kansas
- » Walnut Creek, California
- » Washington, DC

## Executive and Management Coaching

Management Partners has provided executive coaching to a wide variety of individuals in agencies throughout the country, including those below.

Benicia, California	
<p>Mr. Brad Kilger City Manager, City of Martinez (former City Manager of Benicia) 525 Henrietta Street Martinez, CA 94553 (925) 372-3500 bkilger@cityofmartinez.org</p>	<p><b>Public Works Director and Finance Director Executive Coaching</b> Management Partners was engaged to provide one-on-one executive coaching for the (now former) finance director and the public works director. This involved regular coaching sessions, a review of strengths and weaknesses, completion of a self-assessment, and a peer assessment survey completed by colleagues. Both also received a completed Coaching Work Plan to guide future professional development.</p>
Sacramento Area Council of Governments, California	
<p>Mr. Kirk Trost Chief Operating Officer/General Counsel 1415 L Street, Suite 300 Sacramento, CA 95814 (916) 340-6210 ktrost@sacog.org</p>	<p><b>Mediation and Executive Coaching</b> Management Partners conducted a confidential mediation between two management employees. The assignment was aimed at improving communication and gaining an understanding of how each employee could work productively with the other. After the mediation, Management Partners continued to provide ongoing executive coaching for one of the employees.</p>
Cypress, California	
<p>Mr. Rod Cox Chief of Police City of Cypress 5275 Orange Ave Cypress, CA 90630 (714) 229-6644 rcox@ci.cypress.ca.us</p>	<p><b>Executive Coaching</b> Management Partners provided executive coaching services to a commander who was appointed to serve as acting police chief following a retirement. Coaching continued after his permanent appointment as chief. The project involved regular meetings, a review of strengths and weaknesses, and guidance on city manager-executive team relationships.</p>

Other jurisdictions we have assisted with coaching include:

- » Alameda, California
- » Albany, California
- » Association of Bay Area Governments, California
- » Benicia, California
- » Berkeley, California
- » Best, Best & Krieger
- » Cooperative Agricultural Support Service, California
- » Concord, California
- » Dublin, California
- » Fairfield, California
- » Fullerton, California
- » Hayward Area Recreation District, California
- » Los Altos Hills, California
- » Manteca, California
- » Moraga, California
- » Oakland, California
- » Orinda, California
- » Peninsula Family Service, California
- » Sacramento Area Council of Governments, California
- » South Lake Tahoe, California
- » Vallejo, California

## Training

Management Partners has conducted training in workshops and to individuals for specific needs. Our clients receive training that is specifically tailored to achieve the desired outcomes.

Laguna Beach, California	
<p>Mr. Gavin Curran Administrative Services Director 505 Forest Avenue Laguna Beach, CA 92651 (949) 497-0315 gcurran@lagunabeachcity.net</p>	<p><b>Administrative Services Department Workshop</b> Management partners was engaged to facilitate a half-day workshop with the leadership team of the Administrative Services Department. New functions had been incorporated into the department and the director was interested in creating a new mission, setting goals, and building the leadership team. The result was a new mission statement, a set of values, clear goals and agreements on communications.</p>
Tavares, Florida	
<p>Mr. John H. Drury, ICMA-CM, AAE, City Administrator 201 E. Main Street Tavares, FL 32778 (352) 742-6209 jdrury@tavares.org</p>	<p><b>Performance Measurement Training</b> Management Partners provided a daylong training session on developing performance measures for the city administrator, department directors, and other key staff. The goal of the training was for attendees to gain a deeper understanding of selecting and using metrics to monitor and manage process performance and outcomes. During the training session, each department developed measures that will be used in the budget process.</p>
DeKalb County, Georgia	
<p>Mr. Zachary Williams, Chief Operating Officer DeKalb County Manuel J. Maloof Center 1300 Commerce Drive, 6th Floor Decatur, GA 30030 (404) 371-2174 zwilliams@dekalbcountyga.gov</p>	<p><b>Outcome Budgeting Performance Management Training</b> Management Partners developed and conducted a comprehensive training covering all aspects of outcome budgeting and performance measurement during a one-day intensive training session that included County executives, senior and mid-level managers and Finance staff involved in the development of county-wide performance measures. A wide range of topics was covered including outcome-based budgeting, missions, goals, objectives, performance measures, targets and calculation methodology. Specific attention was paid to the link between all of these subjects and how even the smallest measure links to the County’s strategic priorities and department strategic plans.</p>

- » Alameda, California
- » Albany, California
- » Bay Area Rapid Transit, California
- » Benicia, California
- » Berkeley, California
- » Cooperative Agricultural Support Service
- » Contra Costa Transportation Authority, California
- » Costa Mesa, California
- » Cypress, California
- » Danville, California
- » DeKalb County, Georgia
- » Dublin, California

- » El Segundo, California
- » Fairfield, California
- » Fremont, California
- » Garden Grove, California
- » Healdsburg, California
- » Laguna Beach, California
- » Livermore, California
- » Los Altos Hills, California
- » Milpitas, California
- » Monterey County, California
- » Moraga, California
- » Morgan Hill, California
- » Napa, California
- » Newport Beach, California
- » Orinda, California
- » Oxnard, California
- » Palos Verdes Estates, California
- » Pleasanton, California
- » Roseville, California
- » San Jose, California
- » San Rafael, California
- » Santa Rosa, California
- » Scotts Valley, California
- » Tavares, Florida
- » Vallejo, California

## Policy and Regulation Development Assistance

Most of our work analyzing and developing policy or regulations is conducted within larger projects. We have provided examples where

<b>San Jose, California</b>	
<p>Ms. Rachel VanderVeen Housing Policy &amp; Program Administrator San Jose City Hall 200 E. Santa Clara Street San Jose, CA 95113 (408) 535-8321 Rachel.VanderVeen@sanjoseca.gov</p>	<p><b>Apartment Rent Ordinance (Multiple Projects)</b> Management Partners was engaged by the City of San Jose to assist with their rent stabilization program. The City has had a rent stabilization ordinance since the early 1980s but was largely ineffective with its 8% annual cap on rent increases and generous operating increase and capital investment pass-throughs. With the recovery of the technology industry following the great recession, several years of high rent increases created a significant economic burden on many long-term residents. In 2015, the City Council created an interim ordinance reducing the rent increase cap to 5% and tightening the pass-throughs that were allowed. Staff was instructed to return to the Council this year with a comprehensive list of tenant protection ordinances to replace the interim ordinance.</p> <p>Management Partners has been assisting the Housing Department staff in a variety of areas as the new ordinances are drafted and program elements planned. Management Partners’ assistance to date has included the following components.</p> <ul style="list-style-type: none"> <li>• Research and recommend policy and program elements for:                             <ul style="list-style-type: none"> <li>○ Relocation programs under the Ellis Act,</li> <li>○ Just cause eviction policies, and</li> <li>○ Anti-retaliation policies.</li> </ul> </li> <li>• Assess technology and make recommendations for optimization.</li> <li>• Develop process maps and identify process improvements.</li> </ul>

	<ul style="list-style-type: none"> <li>• Assess staffing assessment and develop job descriptions.</li> <li>• Assist with a fee study.</li> </ul>
<b>Lake County Commission on Government Reform and Accountability</b>	
<p>Barry Burton          County Administrator          18 N County Street          Waukegan, IL 60085          (847) 377-2250          bburton@lakecountyil.gov</p>	<p>Management Partners provided research and support to the Commission during the process of evaluating proposed reform measures for the County Board. The subjects for analysis were to analyze redistricting, the method of electing the Board Chair, the size of the Board and other areas for reform. During the project, Management Partners facilitated eight Commission meetings, which included presentations about research results and expert testimony. Among the many recommendations developed was a cutting-edge decision to establish an independent advisory board.</p>
<b>Kenton County Governance Committee, Kentucky</b>	
<p>Mr. John R. Nienaber, Jr.          Vice President Commercial Lending          Heritage Bank          1911 Dixie Highway          Fort Wright, Kentucky 41011          (859) 344-9205          j.nienaber@heritagebank-ky.com</p>	<p><b>Planning Facilitation</b>          Management Partners assisted the Kenton County Governance Committee in deliberating the options for consolidating local governments and agencies within the county to simplify the governance and tax structure. This was part of a multi-year process that culminated in a recommendation to make significant changes to the County structure to provide a platform for service sharing and consolidation.</p>

## Process Improvement

Management Partners helps entire jurisdictions or departments identify practical process improvements to increase efficiency, effectiveness, and community interaction.

<b>Largo, Florida</b>	
<p>Ms. Carol Stricklin          Director, Community Development Department          201 Highland Avenue          Largo, FL 33779          (727) 586-7490          cstrickl@largo.com</p>	<p><b>Development Review Process Improvement</b>          Management Partners assisted the Largo Community Development Department in 2013 with a comprehensive review of its development review process, including developing process maps and facilitating a Process Improvement Workshop with staff. In 2016, we were asked to update the Development Review Process Improvement action plan in preparation for a new plan review and permitting software system. Management Partners met with the director and managers to update the status of the original action plan. We conducted focus groups with Community Development staff and outside reviewers and inspectors to update process maps to reflect functional changes and responsibilities. After updating the action plan and process maps, Management Partners facilitated a workshop with Community Development managers, supervisors and employees to identify process improvements and</p>



	actions steps needed to further support customer service improvements.
<b>Oakland Park, Florida</b>	
<p>Mr. David Hebert City Manager 3650 NE 12th Avenue Oakland Park, FL 33334 (954) 630-4300 DavidH@oaklandparkfl.gov</p> <p>Mr. Brad J. Ostroff Assistant Director Engineering and Community Development Department 5399 North Dixie Hwy, Suite 3 Oakland Park, FL 33334 (954) 630-4344 brado@oaklandparkfl.gov</p>	<p><b>Special Events Process Assessment</b> Management Partners has an ongoing contract to help Oakland Park analyze various departments and programs. For the special events program, we developed process maps of the application processes, identified improvements, and reviewed the special events policy. City leaders have since adopted improved policies and processes, which have reduced cycle time and should increase customer satisfaction.</p> <p><b>ERP/Permitting Process Improvement</b> Management Partners analyzed workflow for functions of the Engineering and Community Development Department including building permits, planning and zoning, code enforcement, business tax receipts, and two proposed processes, engineering project management and backflow preventer testing. As-is process maps were created to assist with the implementation of the EnerGov software system. Recommendations for improving the current workflow and review processes were prepared.</p>
<b>Pasadena, California</b>	
<p>Mr. Ara Maloyan, P.E. Director of Public Works 100 N. Garfield Ave. Room N306 Pasadena, CA 91109 (626) 744-4233 amaloyan@cityofpasadena.net</p> <p>Mr. David Reyes Director, Planning and Community Development Department 175 N. Garfield Avenue Pasadena, CA 91109 (626) 744-7231 davidreyes@cityofpasadena.net</p>	<p><b>Public Works Department Process Mapping 2017</b> Management Partners was engaged by the City of Pasadena’s Departments of Public Works (DPW) and Transportation (DOT) to prepare process maps that show current and revised processes for work orders and implementation of Capital Improvement Projects (CIP). We facilitated several workshops with staff involved in each of the processes and prepared draft flow charts. After reviewing them with staff, we identified improvements, clarified which department was responsible for which steps, and prepared "to be" process maps showing the improvements.</p> <p><b>Plan Review and Permitting Process Improvement 2017</b> Management Partners’ conducted a study for Pasadena’s Planning and Community Development Department to identify improvements in the plan review, permitting and inspection processes. The project included conducting interviews with staff and stakeholders, reviewing the current processes and procedures, and making recommendations to improve customer service and workflow in the Permit Center, as well as plan check, inspections, technological improvements, training, and performance metrics. When the recommendations are implemented, customers will experience a more streamlined process.</p>

## Conclusion

Management Partners has the experience, the professional talent, and the commitment to quality necessary to successfully complete the projects for the City of Gainesville. We welcome the opportunity to provide additional information that may be helpful, and we look forward to the chance to discuss the ideas contained in this proposal.

Cover photo: Courtesy of City of Gainesville, FL – Government Facebook page

## Attachment A – Project Team Resumes

### **GERALD E. NEWFARMER**

Jerry Newfarmer, President and CEO, founded Management Partners in 1994 to help government leaders improve their operations to better serve their publics. He has led the company, which has offices in Ohio and California, in hundreds of projects to help governments, large and small, improve both governance and operations. Management Partners has pioneered many techniques for more effective leadership of local government, from policy development to implementation.

Jerry has extensive public service experience, having served in top city management roles in California and Ohio. He also has been a leader in professional organizations like the International City/County Manager's Association; was president of the San Francisco Chamber of Commerce; and headed the State and Local Government Team in the National Performance Review, an examination of the operations and management of the Government of the United States.

Jerry began his career with the city of Oakland, California, where he served in a variety of management positions over a 10-year period, concluding as assistant city manager, the chief operating officer role. He subsequently served as city manager of Fresno and San Jose, California; and of Cincinnati, Ohio.

As a national leader in local government performance management, Jerry was instrumental in establishing the International City/County Management Association's Center for Performance Measurement. He also has been active in professional organizations, serving as a member of the ICMA Government Affairs and Policy Committee. He serves as executive director of the Large Cities Executive Forum; and is a past president of the City Manager's Department of the League of California Cities and the San Francisco Bay Area Chapter of ASPA. Jerry has been recognized as a Credentialed Manager of the ICMA.

Jerry earned a bachelor's degree in business administration from San Jose State University and a Master of Public Administration degree (with distinction) from the University of California at Berkeley. He was honorably discharged from the U.S. Navy with the rank of lieutenant, after service on destroyers.

## **KEVIN KNUTSON**

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Kevin Knutson, ICMA-CM, is Regional Vice President for Management Partners in Cincinnati, Ohio. Kevin has more than 20 years of experience in local government, including ten years in strategic planning, budget, performance measurement, and process improvement and six years in community relations, communications, and citizen engagement.

He has served as an assistant city manager for the City of Reno, Nevada, with oversight of human resources, intergovernmental affairs, economic development, and redevelopment; as well as neighborhood services, community resources, and public information. He also served as interim city manager for the City of Reno and interim executive director of the Reno Redevelopment Agency. In September 2011, he was named "Communicator of the Year" by the City-County Communications & Marketing Association (3CMA).

He previously served as the director of the office of management and budget, where he oversaw strategic planning, budgeting, performance measurement, internal audit, community resources, and public outreach. Before that, he was the director of community relations, with responsibility for the City's communications, neighborhood services, and Reno Direct. This included responsibility for media and public relations, advertising, Reno TV, the City's website and intranet, the City's call center, neighborhood services, and the community liaison program. Prior to joining Reno, Kevin served as the director of communications and marketing for the City of Coral Springs, Florida.

For seven years, he served as the budget and strategic planning manager for Coral Springs, overseeing the award-winning strategic plan, business plan, budget, capital improvement and replacement programs, performance measurement system, process improvement program, managed competition, and elements of the City's quality initiative. He was writer and editor of the City's Baldrige and Sterling applications and has served as a Sterling Examiner. The City of Coral Springs was awarded the Florida Governor's Sterling Award for Organizational Excellence in 1997 and 2003, and was the first local government to win the Malcolm Baldrige National Quality Award in 2007.

He is recognized as a national expert in local government performance management, long-term financial planning, and communications; and has been a speaker and author on long-range financial planning and performance management for the Government Finance Officers Association (GFOA), the American Productivity and Quality Center (APQC), and 3CMA. He currently serves as an advisor to GFOA's Budget and Fiscal Policy Committee and is a member of the International City-County Management Association (ICMA) Digital Strategies Board.

Kevin earned master and bachelor degrees in English from Florida International University in Miami, Florida; and has attended the Center for Creative Leadership, GFOA's Advanced Government Finance Institute, and Harvard's Kennedy School of Government executive program. He was honorably discharged from the U.S. Army, after service in Germany.

**AMY COHEN PAUL**

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Amy Cohen Paul, Corporate Vice President, has over 30 years of experience assisting local governments with a variety of engagements, including process improvement and performance management systems. Her expertise includes research and training in performance measurement and benchmarking, process improvement, total quality management, strategic and business planning, organizational development, and identifying service sharing opportunities among jurisdictions. She is also a skilled facilitator and trainer.

Amy has managed a variety of Management Partners' process improvement, strategic planning, organization review, and performance measurement and benchmarking projects. She has worked with small and large jurisdictions, as well as special districts. A sampling of clients she has helped with process improvement projects include: North Port and Largo, Florida; Lexington-Fayette Urban County Government and Louisville, Kentucky; Des Moines, Iowa; the City of Rockville, Howard County, and the Maryland-National Capital Park and Planning Commission, Maryland; Oklahoma City, Oklahoma; and Burlingame, Gilroy, Santa Cruz, San Leandro, and Stockton, California.

Her focus is on identifying meaningful, results-oriented measures and industry best practices. A sampling of clients she has assisted with organization reviews and performance management systems includes: Berkley, Burlingame, San Jose, San Leandro, Oakland, Woodland and Marin County, California; Manchester, Connecticut; Louisville, Florence, and Kenton County, Kentucky; Des Moines, Iowa; Rockville, Maryland; the Unified Government of Wyandotte County/Kansas City, Kansas; Kansas City, Missouri; Arlington Public Schools, Virginia; the District of Columbia; Rye, New York; Lexington, Massachusetts; and Montgomery and Westerville, Ohio.

A sampling of clients she has helped with strategic planning and goal setting include the cities of Huntington Beach, La Palma, and Pittsburg, the Orange County Cemetery District, and the Solano Irrigation District, California; the City of Louisville and the Louisville Department of Health, Kentucky; the Hamilton County Job and Family Services Agency and the Hamilton County Solid Waste District (Ohio); Montgomery, Ohio; the Town of Mansfield and the Mansfield Downtown Partnership, Connecticut.

Amy was part of the original management team of the International City/County Management Association's (ICMA) Comparative Performance Measurement Consortium. It originally was a group of about 40 large cities and counties, and has grown to more than 120 jurisdictions.

Amy designed and presented performance measurement and benchmarking training sessions for more than 75 jurisdictions, and for the ICMA University. She also helped design a training program to develop outcome-based indicators. Amy has designed and lead community workshops on performance measurement with the National Civic League.

Amy directed a three-year Leadership Development Program for the ICMA, funded by the W.K. Kellogg Foundation. She developed a multi-media training program and implementation materials for public boards, commission and committees. She also directed a two-year FutureVisions Program for the ICMA, working with 67 communities.

She is the editor of the book, *Managing for Tomorrow: Global Change and Local Futures*, and is the author of many articles in professional publications, including *The Municipal Year Book*.

Amy earned a bachelor's degree in public communication and a master's degree in public administration from The American University.

**WAYNE V. CHAPMAN**

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Wayne Chapman, Partner, has more than 35 years of experience in local government organizations. He has led a variety of consulting projects for Management Partners since 1994. Earlier, he served as city manager of Aspen, Colorado, and Schenectady, New York; and he was budget director and director of Neighborhood Housing and Conservation for the City of Cincinnati, Ohio.

Wayne's consulting engagements have included comprehensive staffing reviews, organizational analyses, process improvement projects, management information systems, performance measurement, training, financial modeling and forecasting, and cost recovery modeling. He is knowledgeable about numerous functions of government, including law enforcement, courts, jails, child support enforcement, development review, emergency communications operations, housing, schools, public works, airports and fire service.

As a Management Partners consultant, Wayne has helped police departments in Boston, Baltimore, Cleveland, Albuquerque, Louisville, Kentucky; and Topeka, Kansas. Wayne has worked with sheriff's departments in Polk County, Florida; King County, Washington; and Loudoun County, Virginia. He has reviewed court operations in district and common pleas courts. And he has worked with corrections agencies, including affiliated services such as probation, parole and diversion programs.

Wayne has managed development review improvement projects for several fast-growing jurisdictions, including Wichita, Kansas; Cape Coral, Florida; Louisville and Las Vegas. These projects have successfully improved the development review process without compromising quality.

Wayne also has carried out comprehensive organization reviews of many local governments, as well as specific departments within local governments. Those include Polk County, Melbourne, Oakland Park, Cape Coral and Sanford, Florida; Topeka and the Unified Government of Wyandotte/Kansas City, Kansas; Raleigh, North Carolina; Independence, Missouri; Kenton County, Covington and Louisville, Kentucky; New Orleans, Louisiana; Gulf Shores, Alabama; Las Vegas, Nevada; Wichita, Kansas; Allegan County, Michigan; Spartanburg, South Carolina; and Loudoun County, Virginia.

Wayne earned a bachelor's degree in political science from the University of Cincinnati.

## **NANCY N. HETRICK**

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Nancy Hetrick, Partner, has over 20 years of local government experience as a consultant and as a practitioner. She began her career in the nonprofit sector and then worked for Norman Roberts and Associates, a professional executive recruitment firm, where she led candidate research efforts and background screening. Nancy joined Management Partners in 1996 and spent five years assisting with a variety of city and county projects, including developing and implementing performance measurement systems and conducting organization and process improvement projects. She gained a particular expertise in developing performance measurement systems and served as a primary trainer the International City/County Management Association (ICMA) Center for Performance Measurement.

In 2001, Nancy accepted a position in the County Manager's Office in San Mateo County. As a principal management analyst, Nancy oversaw criminal justice assignments, including budget, performance and special projects, and led a countywide performance management effort. Nancy developed and conducted countywide training, facilitated planning and performance work sessions, and led efforts to strengthen the linkage between program performance and priorities and the County's Shared Vision.

Nancy returned to Management Partners in 2006. Since her return, she has led projects for cities, counties and special district across California and has been actively involved in professional associations serving the profession. Her areas of interest and expertise include coaching and talent development; organizational succession planning; executive recruitment, performance management, strategic planning, organizational effectiveness, and facilitated problem-solving/process improvement. Nancy is especially skilled at working with teams to improve their effectiveness, working collaboratively with the client to address the most important issues in an engaging and productive manner.

Nancy earned a bachelor's degree in political science, with an emphasis in public administration, from California State University at Chico. She completed coursework toward a master's degree in public administration from California State University at San Francisco and is certified in several assessment instruments, including the Myers-Briggs Type Indicator (MBTI), DiSC, and CPI260 and has utilized other tools such as the Whole Brain and StrengthFinders to meet specific client needs. She was president of the Municipal Management Association of Northern California in 2006. In 2007, she founded and chaired the first annual MMANC Women's Leadership Summit and remains actively involved by delivering talent development workshops and facilitating the Board's annual planning retreat. She currently serves on the steering committee of the Cal-ICMA Talent Development Initiative and is a member of ICMA.



**GREGORY B. HORN**

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Greg Horn, Special Advisor, has 40 years of local government management experience, serving as city manager in four communities within Ohio and Missouri. He joined Management Partners in 2017, after retiring from city manager of Centerville, a position he held for 25 years.

Greg has extensive experience in economic development, utility management, and infrastructure project oversight. He has managed construction efforts for police facilities, government centers, industrial parks, utility plant expansions, park and recreation developments, including a \$300 million municipal golf/residential development.

Greg served as the past president of the Ohio City/County Management Association, the Dayton Area Managers Association, the Miami Valley Communications Council and the Montgomery County Regional Communication Council of Government. He served on numerous technical advisory committees throughout his career ranging from regional economic development and utility systems to airport master plans and statewide solid waste committees.

Greg was recognized by the Ohio City/County Management Association when he received their Career Development and Local Government Cooperation Awards. He has been a member of Rotary International for over 30 years in Centerville. He served as the Ohio Chapter Past President and has twice received the Paul Harris Fellow award.

Since joining Management Partners, Greg has assisted with projects in Oxford and Montgomery Ohio and Independence, Missouri.

Greg holds a bachelor's degree from Bowling Green State University as well as a master of science degree in public administration from the University of Missouri where he was awarded a research assistantship. He received additional training in emergency preparedness, attending FEMA's National Training Program in Emmitsburg, Maryland and represented Southwest Ohio on an economic development mission to Japan and South Korea.

## **JACQUELYN Y. MCCRAY, PH.D., AICP**

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Jacquelyn McCray, Senior Manager, has more than 25 years of experience in local government management. Nine of those years were with the City of Cincinnati, where she was a budget analyst, project manager and land-use planner. Since joining Management Partners Jacquelyn has been a key staff member on myriad projects analyzing development review processes, performance measurement and organizational review. She is particularly adept at strategic planning, process improvement, benchmarking, performance management, training and development, and focus group facilitation.

Jacquelyn is a member of the American Planning Association and a certified economic development professional. She served as a member and vice chairperson of the Cincinnati City Planning Commission for nine years.

Jacquelyn has assisted organizations in future search, mission and vision setting, the identification of critical environmental indicators, and in crafting goals and objectives in the completion of strategic planning projects. Specifically she has assisted the following cities and organizations to develop strategic plans: Village of Port Chester, New York; Town of Bladensburg, Maryland; City of Newport, Rhode Island; City of Margate, and Lakeland, Florida, Ingham County, Michigan; City of Morgantown, West Virginia; the Mansfield Downtown Partnership, Mansfield, Connecticut; Montgomery, Ohio; the Louisville, Kentucky Health Department; the Town of Mansfield, Connecticut; Hamilton County, Ohio Department of Job and Family Services; Lake County, Illinois and The Advance, a Division of the General Board of Global Ministries of the United Methodist Church.

With Management Partners, Jacquelyn has developed refined expertise in conducting development review process analyses and improvement projects for the following clients: Saint Paul, Minnesota; Largo, Florida; the Louisville, Kentucky consolidated government; Cape Coral, Florida; Wichita, Lenexa and Olathe, Kansas; Nevada County, California; the Maryland-National Capital Park and Planning Commission; the Unified Government of Wyandotte County and Kansas City, Kansas; Lexington, Kentucky; Howard County, Maryland; North Port, Michigan; and Oklahoma City, Oklahoma.

In the area of performance measurement and management projects, Jacquelyn has assisted Westerville, Ohio; the District of Columbia; Arlington County Public Schools and Loudoun County, Virginia; the Louisville, Kentucky consolidated government; the Unified Government of Wyandotte County, Kansas; and King County, Washington. She has also conducted performance measurement training for many jurisdictions.

Jacquelyn has completed human resources benchmarking analyses for Sedgwick County, Kansas; and Loudoun County, Virginia; and she assisted with benchmarking and compensation analyses for the cities of Oakland and Santa Clara, California. She also worked with the City of Covington, Kentucky to develop a long-range financial plan.

Jacquelyn has completed organization development and improvement reviews, position analyses and service consolidation assessments for agencies across the country. Among them are Blue Ash, Montgomery and Sycamore Community Schools in Ohio; Chesapeake, Hampton and Richmond, Virginia; Berks County, Pennsylvania; Kansas City, Kansas; the Nashville (Tennessee) Airport Authority; Kenton County and the consolidated governments of Louisville and Lexington Kentucky; the City of Fort Wayne and Allen County, Indiana and Lancaster, Muhlenberg, Harrisburg and Reading, Pennsylvania.

Jacquelyn recently completed her doctoral studies at Antioch University in Leadership and Change. She also holds a bachelor's degree in urban planning and a master's degree in public administration from the University of Cincinnati.

## **FRANCINE RAMAGLIA, CPA, AICP**

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Francine Ramaglia is a senior manager with over 25 years in local government. She is a generalist with highly specialized skills, including being a certified planner, a Certified Public Accountant (CPA), and an International City-County Management Association (ICMA) Credentialed Manager. During her local government career, Francine was assistant city manager for two of the largest and most dynamic cities in Palm Beach County, Florida. Most recently she served at the City of Delray Beach, Florida, a two-time All-America City award-winning community, newly voted the most fun small town in America. Prior to joining Delray Beach, she was assistant city manager in Wellington, Florida, where she had the unique opportunity to take part in the City's incorporation and see it transform from a small town to the Winter Equestrian Capital of the World, as well as one of *Money Magazine's* Top 50 Best Places to Live.

She has served as acting director of numerous departments and community agencies, including as the Planning, Zoning and Building Director in Delray Beach. Her primary areas of responsibility have included community development and neighborhood services; strategic and long-range planning; economic development; public affairs and special events; communications and technology services; human resources; and financial and administrative services. Prior to joining Wellington, she was a senior manager with KPMG, an international accounting and consulting firm, where she managed annual audits of several municipalities and special districts.

Francine currently serves as a member of several ICMA and Florida City-County Management Association (FCCMA) committees, the Government Finance Officers Association (GFOA) Economic Development and Capital Planning Committee, the Women Leading Government Coalition, the Economic Development and Technology Divisions of the American Planning Association (APA), the Advisory Board of the Florida League of Cities (FLC) Municipal Investment Trust, the FLC Finance Taxation and Personnel Committee, the Wellington Charter Review Task Force, the Wellington Historical Society and the Palm Beach County Planning Congress.

She is an active trainer and frequent speaker for a wide variety of professional organizations. She also serves as the instructor for the Florida League of Cities University Summit on Best Practices in Budgeting; as a guest lecturer in the School of Urban and Regional Planning at Florida Atlantic University; and as a session leader for the economic development, budget and capital planning sections of the AICP exam review course.

Francine holds a bachelor's degree in business administration-accounting, with honors, from Florida Atlantic University, and is currently midway through a master's degree in public administration program there. Francine lives in southeast Florida.

## JAN GOLDSTEIN

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Jan Goldstein, Senior Manager, has worked with and in the public sector, including executive management roles, for more than 18 years.

Jan is skilled in strategic and long-range planning; process analysis and improvement; training, facilitating and writing operations and personnel manuals. She has specific expertise in fleet, facilities, contract management, and parking operations and management, including revenue control.

While managing a non-profit organization that was federally funded, Jan was accountable for overseeing every aspect of operations including strategic planning, finance, community relations, federal, state and local compliance, fundraising, asset management, human resources, and marketing. She developed documentation and implemented streamlined processes to create staff efficiencies, allowing more time for other employee responsibilities.

As a consultant, Jan worked with municipalities, hospitals, universities and airports to incorporate innovative techniques that resulted in enhanced business practices and increased productivity. Jan's consulting engagements have included shared services reviews, organizational and facilities assessment analyses, executive recruitment, and process improvement projects. She has experience and expertise identifying best practices. She worked with clients to offer creative solutions within the constraints of the agencies' operations.

While a department director with the Indianapolis Airport Authority, Jan successfully planned for long-range department development, including providing training and progressive programs for personnel. She worked with her staff to develop policies and procedures, creating a department with a national reputation for employee training, retention, promotion, and honesty.

During her work with Management Partners she has been the project manager or a team member for organization reviews, process improvement projects, strategic planning, shared services, and fee studies.

Jan received a Bachelor of Science and Master of Science degrees in education from Indiana University. She has been a presenter at international conferences and has published articles in several publications.

## **SAMUEL J. LIEBERMAN**

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Sam Lieberman, Senior Management Advisor, joined Management Partners in April 2010. Since then he has conducted complex financial and operational analyses to support a variety of assignments including organization and process improvement studies, and service sharing, financial planning, and budgeting projects. He has helped facilitate strategic planning and process improvement workshops, conducted research and analysis on staffing studies, assisted in the developing performance measurement systems, directed benchmarking research, and conducted employee satisfaction and internal services surveys. Sam recently co-authored an article on how government can take advantage of data analytics programs that appeared in PM Magazine.

During his tenure at Management Partners, Sam has assisted with the development of performance measures in Fairfield, Westerville, and Huron County Ohio and managed the annual Ohio Fire Benchmarking Project and Midwest Benchmarking Partnership. He has participated in numerous fire and police organizational assessments, most recently for Florence, Kentucky and Chatham County, Georgia. He has facilitated strategic planning efforts in Montgomery, Ohio, Morgantown, West Virginia, and Bladensburg, MD and has developed and analyzed strategic planning community surveys, most recently for the cities of Margate, Florida and Santa Ana, California. He has analyzed budgets and staffing for several jurisdictions and assisted with a fleet management study.

Sam has most recently helped Saint Paul, Minnesota and Aurora, Colorado improve their development review processes. Other clients he has served include the cities of Berkeley, Carson and San Bernardino, Orange County, Santa Clara Valley Water District and Zone 7 Water Agency in California; Hartford, Mansfield, and New Haven, Connecticut; Kenton County and Florence, Kentucky; Kansas City, Missouri; DeKalb County, GA; Pinellas County and Largo, Florida; Phoenix, Arizona; and Hamilton County, Fairfield, Mason, Cincinnati, Montgomery, Westerville, Monroe and Green Township Ohio.

Sam gained valuable experience in the day-to-day functioning of local government during an internship with the City of Cincinnati while completing his undergraduate work. He researched the feasibility of implementing a streetcar system in Cincinnati and prepared staff reports on the subject. He also assisted with the process of rolling out and implementing CincyCare, a public/private health care partnership. As he was concluding his political science degree, Sam authored a scholarly article that assessed the accuracy of pre-primary polling in the 2008 Democratic Presidential Primary. That paper was presented during a conference of the Midwest Association for Public Opinion Research in September 2008. Sam graduated from the University of Cincinnati in 2008 with honors degrees in sociology and political science.

Prior to joining Management Partners, Sam worked in local politics. He managed a Cincinnati City Council campaign and then served as deputy finance director for a Congressional campaign.

## Attachment B – Required Forms

- » Hourly Rates for Management Partners
- » Financial Solvency letters
- » Proposal Response Form – Signature Page
- » Drug Free Workplace Form
- » Addendum No. 1 Acknowledgement
- » State of Florida Department of State Certificate

Item #170915K



## Hourly Rates for Management Partners

The respondent for all areas is Management Partners.

### Area 1 – Organizational Design

Job Title	Principal	Senior Consultant	Consultant	Junior Consultant	Program/ Administrative Support
<b>Hourly Rate</b>	\$250	\$190	\$175	\$140	\$125

### Area 2 – Human Resource Policy

Job Title	Principal	Senior Consultant	Consultant	Junior Consultant	Program/ Administrative Support
<b>Hourly Rate</b>	\$250	\$190	\$175	\$140	\$125

### Area 5 – Leadership

Job Title	Principal	Senior Consultant	Consultant	Junior Consultant	Program/ Administrative Support
<b>Hourly Rate</b>	\$250	\$190	\$175	\$140	\$125

### Area 6 – Executive Coaching

Job Title	Principal	Senior Consultant	Consultant	Junior Consultant	Program/ Administrative Support
<b>Hourly Rate</b>	\$250	\$190	\$175	\$140	\$125

Item #170915K

December 26, 2016

Traci Fitzharris, Buyer  
City of Long Beach, Purchasing Division  
333 W Ocean Blvd, 7<sup>th</sup> Floor  
Long Beach CA 90802-4604

Dear Ms. Fitzharris,

Since its founding in 1994, Management Partners has been financially sound. US Bank has provided banking services to Management Partners, Inc., since its inception in 1994. We have annually authorized a line of credit which the firm has used to maintain a comfortable level of working capital well over the last fifteen years. The firm has always met its obligations to the bank (as well as to every one of its creditors), without exception. Our most recent thorough review of Management Partners financial circumstances was conducted within the last three months and a continuing line of credit in the amount of \$350,000 was again authorized.

We know that Management Partners has always maintained adequate financial reserves either in-house or through its continuing line of credit with US Bank. Our direct knowledge of the financial condition of the firm enables us to attest to its prudent financial management and that it is financially sound.

As the Relationship Manager for Management Partners, I have direct knowledge of their financial strength and credit capacity.

Sincerely,



Ola Rosberg  
US Bank Vice President

# Whitmer & Company CPA's, LLP

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Certified Public Accountants

Fourth and Walnut Centre  
105 East Fourth St., Suite 1100  
Cincinnati, Ohio 45202-4011  
Phone: 513-381-8010  
Fax: 513-381-2601

December 27, 2016

Traci Fitzharris, Buyer  
City of Long Beach, Purchasing Division  
333 W Ocean Blvd, 7<sup>th</sup> Floor  
Long Beach CA 90802-4604

Dear Ms. Fitzharris,

Since its founding in 1994, Management Partners, Inc. has been financially sound. Whitmer & Company CPA's, LLP has provided certified public accounting services to Management Partners, Inc., since its inception in 1994. We have prepared the tax returns annually for the firm and have been fully conversant with its financial position throughout those years.

We know that Management Partners, Inc. has always maintained adequate financial reserves either in-house or through its continuing line of credit with US Bank. Our direct knowledge of the financial condition of the firm enables us to attest to its prudent financial management and that it is financially sound.

Sincerely,



John P. Whitmer, CPA

# PROPOSAL RESPONSE FORM – SIGNATURE PAGE

**(submit this form with your proposal)**

TO: City of Gainesville, Florida  
200 East University Avenue  
Gainesville, Florida 32601

PROJECT: Management Consulting (Non-Construction)

RFQ#: CMGR-180051-GD

RFQ DUE DATE: February 8, 2018, 3:00pm Local Time

Proposer's Legal Name: Management Partners, Incorporated

Proposer's Alias/DBA: \_\_\_\_\_

Proposer's Address: 1730 Madison Road

Cincinnati, Ohio 45206

**PROPOSER'S REPRESENTATIVE (to be contacted for additional information on this proposal)**

Name: Gerald E. Newfarmer, President and CEO Telephone Number 513-861-5400

Date: February 5, 2018 Fax Number 513-861-3480

Email address jnewfarmer@managementpartners.com

**ADDENDA**

The Proposer hereby acknowledges receipt of Addenda No.'s 1-Feb. 1, \_\_\_\_\_, \_\_\_\_\_, to these Specifications.

**TAXES**

The Proposer agrees that any applicable Federal, State and Local sales and use taxes, which are to be paid by City of Gainesville, are included in the stated bid prices. Since often the City of Gainesville is exempt from taxes for equipment, materials and services, it is the responsibility of the Contractor to determine whether sales taxes are applicable. The Contractor is liable for any applicable taxes which are not included in the stated bid prices.

**LOCAL PREFERENCE (check one)**

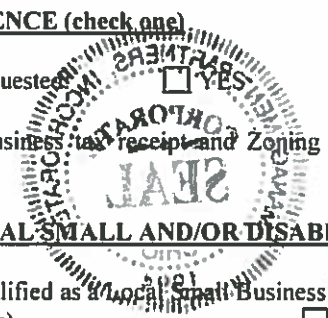
Local Preference requested  YES  NO

A copy of your Business tax receipt and Zoning Compliance Permit should be submitted with your bid if a local preference is requested.

**QUALIFIED LOCAL SMALL AND/OR DISABLED VETERAN BUSINESS STATUS (check one)**

Is your business qualified as a Local Small Business in accordance with the City of Gainesville Small Business Procurement Program? (Refer to Definitions)  YES  NO

Is your business qualified as a Local Service-Disabled Veteran Business in accordance with the City of Gainesville Small and Service-Disabled Veteran Business Procurement Program? (Refer to Definitions)  YES  NO



**LIVING WAGE COMPLIANCE**

See Living Wage Decision Tree (Exhibit C hereto)

**Check One:**

- Living Wage Ordinance does not apply (check all that apply)
  - Not a covered service
  - Contract does not exceed \$100,000
  - Not a for-profit individual, business entity, corporation, partnership, limited liability company, joint venture, or similar business, who or which employees 50 or more persons, but not including employees of any subsidiaries, affiliates or parent businesses.
  - Located within the City of Gainesville enterprise zone.
- Living Wage Ordinance applies and the completed Certification of Compliance with Living Wage is included with this bid.

NOTE: If Contractor has stated Living Wage Ordinance does not apply and it is later determined Living Wage Ordinance does apply, Contractor will be required to comply with the provision of the City of Gainesville's living wage requirements, as applicable, without any adjustment to the bid price.

**SIGNATURE ACKNOWLEDGES THAT: (check one)**

- Proposal is in full compliance with the Specifications.
- Proposal is in full compliance with specifications except as specifically stated and attached hereto.

Signature also acknowledges that Proposer has read the current City of Gainesville Debarment/Suspension/Termination Procedures and agrees that the provisions thereof shall apply to this RFP.

**ATTEST:**

Jeri L. Beckstedt  
 Signature  
 By: Jeri L. Beckstedt  
 Title: Administrative Services Manager

**(CORPORATE SEAL)  
PROPOSER:**

Gerald E. Newfarmer  
 Signature  
 By: Gerald E. Newfarmer  
 Title: President and CEO



## DRUG FREE WORKPLACE FORM

The undersigned vendor in accordance with Florida Statute 287.087 hereby certifies that

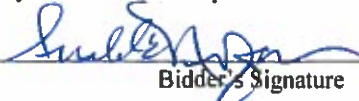
Management Partners

does:

(Name of Business)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty of nolo contendere to, any violation of Chapter 893, Florida Statutes, or of any controlled substance law of the United State or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

  
Bidder's Signature

January 5, 2018

Date

UNITED STATES DISTRICT COURT

Case No. 1:11-cv-00001-UNA

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**ADDENDUM NO. 1**



**Date:** February 1, 2018

**Bid Date:** February 8, 2018  
at 3:00 P.M. (Local Time)

**Bid Name:** Management Consulting (Non-Construction)

**Bid No.:** CMGR-180051-GD

**NOTE:** This Addendum has been issued only to the holders of record of the specifications.

The original Specifications remain in full force and effect except as revised by the following changes which shall take precedence over anything to the contrary.

Please find attached:

- a) Copy of the black out period information (Financial Procedures Manual Section 41-423 Prohibition of lobbying in procurement matters) distributed during mandatory pre-bid meeting.

The following are answers/clarifications to questions received on or before 3:00pm January 25, 2018:

- 1. **Question:** As an RFQ, we plan to provide a representation of the subject matter experts in our stable. Are we required to utilize the staff we propose, and if not, what is the process for approval of additional staff once a project is defined?

**Answer:** No; the City is open to varying resources based on the project needs at the time. Please share the resumes of your associates or those persons that will work on the project.

- 2. **Question:** What is the latest version of the strategic plan and is it available online? If so, what is the URL?

**Answer:** Information pertaining to Gainesville's most recent strategic framework (i.e., strategic plan), including the three phase process that led to its development, is described at:  
<http://www.cityofgainesville.org/CityManager/StrategicPlanning/CityStrategicPlan.aspx>

Additionally, a link the strategic framework one-pager can be found directly at:  
<http://www.cityofgainesville.org/Portals/0/openGNV/Framework%20One-Pager%20-%20for%20prezi.pdf>.

Please note that this framework presents guiding questions for the city to continually align projects, processes and organizational resources. This is not intended to be a strategic plan in the typical "mission, vision, values, objectives" format.

- 3. **Question:** What is the general criteria for onsite work for the potential projects covered by this RFQ  
**Answer:** Please see number 4.

4. Question: Does City of Gainesville encourage and/or permit virtual work tools for meetings and presentations (e.g., WebEx or GoToMeeting)?

Answer: Yes

5. Question: When was the last time the City of Gainesville conducted a review and update of their Human Resource policies?

Answer: This effort has been continuous since 2003, including a comprehensive rewrite that began in 2009. We've found that policies in general are fragmented and in some instances, silent, unclear and/or confusing, inconsistent or outdated relative to changing workplace practices/regulations, market and employee needs.

6. Question: Are there any areas of particular concern regarding Human Resource policies?

Answer: Policies in general are fragmented and in some instances, silent, unclear/confusing, inconsistent or outdated relative to changing workplace practices/regulations, market and employee needs

7. Question: What is the current approval process and structure for policy governance (i.e., how are policies approved)?

Answer: Policies are developed, reviewed and approved, through the department who owns the policy, reviewed as to form and legality with the City Attorney's office, escalated to the City's Charter Officers for review and approval, and when necessary, final approvals are decided on by the elected body consisting of the City Commission and Mayor.

8. Question: Does the City currently outsource any of the IT operations?

Answer: Yes

9. Question: In reference to the statement that Gainesville is not a tourist destination, what primary sources of revenue for the City

Answer: The primary source of revenue for the city is the general fund which is generated through property values, etc.

10. Question: Are there examples to further describe the expectations of a "citizen-centered" City?

Answer: The most comprehensive resources that describe our citizen centered efforts include the following materials:

- a. The Blue Ribbon Report found at:  
<http://www.cityofgainesville.org/Portals/0/clerk/CityComm/BlueRibbonReport.pdf>
- b. A Fast Company Magazine article, available at:  
<https://www.fastcodesign.com/3065107/how-one-florida-city-is-reinventing-itself-with-ux-design>
- c. The city's citizen centered microsite, available at:  
[www.gainesvillecitizens.org](http://www.gainesvillecitizens.org)

11. Question: When was the last time you had a Management Consulting study?

Answer: Over the years, consultants have been brought in for certain departments if needed. We are not aware of an overarching management consultant study that has been conducted for the overall organization in recent years.

12. Question: Did a consultant perform this study? If so, who was the consultant and at what professional fee structure?

Answer: See response to question 11. Fees and fee structure have varied based on the services needed at that time.

13. Question: Is there a preference for using a firm that can complete all areas vs. a firm that is bidding on only a few areas of the project?

Answer: We are open to any proposal whether it includes all services or a few areas as outlined in the RFQ.

14. Question: Do you have a timeline needed for completion?

Answer: This is dependent on the project and would be defined by determining what resources are available, the prioritized need for the work and the timeline the City and consultant agree upon. In some cases it is possible to request that services be expedited

15. Question: Do you have a project budget range for this project or these project areas?

Answer: We are developing a budget range for the various projects. This will be dependent on the department's available funding and the project need

16. Question: Will a company's Acord Form, Certificate of Liability Insurance, provide the City with proof of required insurance?

Answer: Acord Form, COI is acceptable

17. Question: Areas 2, 5 & 6 seem to have common threads; will the City consider merging into one?

Answer: Yes, the City will consider merging various subject areas.

18. Question: What is the meaning of Area 5 - Leadership? Does this refer to cutting-edge / innovative citizen-centered strategies or, more literally, the city's leadership and office leadership?
- Answer: We are interested in proposals on either topic. There is a need for leadership development programs, particularly in the areas of management and executive coaching.
19. Question: Is the Leadership area during implementation?
- Answer: Yes. This bid is intended to encompass a series of projects depending on the City's needs at that point in time. The specific project and implementation timelines will be defined dependent on the department or organization's needs.
20. Question: Will consultant have the ability to identify new gaps and blend into an existing area?
- Answer: Yes. We welcome any feedback the consultant would provide and we would remain open to discussing suggested solutions.
21. Question: If consultant bids for one or less than all areas, how does the city plan to project manage multiple consultants? e.g. Governance structure?
- Answer: Consultants are going to be awarded to be in a pool of consultants that will be individually selected as needed by the City on a per project basis. Consultants will work with the department that has requested their assistance. This will be dependent on the department's available funding and the project need.
22. Question: How will the Smart City Lab with the University of Florida be intertwined into each area?
- Answer: The Lab will be staffed by personnel from both the City and University. The Lab will be the vehicle by which the City and University conduct joint research into smart city technologies and policies.
23. Question: Will ongoing City projects be folded into the consulting services by area or will only new tasks, jointly developed with the consultant and city be in scope?
- Answer: This could be current and existing projects or new projects as determined by the City's prioritized needs and funding availability. Please refer to the RFQ.
24. Question: Would consultant be excluded from any new projects coming out of this engagement, e.g. AV/EV strategy requirement?
- Answer: No

25. Question: What is the fee estimate?  
Answer: The fee estimate is under development at this time.
26. Question: What is the expected contract duration for each area?  
Answer: The expected contract duration will be determined at the time a department selects a vendor
27. Question: What is the procurement type?  
Answer: This is a Request for Qualifications
28. Question: Will PM role apply to all areas in the RFQ? Other projects to be determined at a later date, e.g. Smart City Lab with the University of Florida?  
Answer: I do not foresee us procuring PM services for projects in the Smart City Lab.
29. Question: If we have more than one respondent identified for an area should we blend the rate or just list separately?  
Answer: Blending is acceptable.
30. Question: Is there a page limit?  
Answer: No, however, responses should be kept as concise as possible.
31. Question: Our understanding is that the “Projected award date” refers to the timeframe in which respondents will be informed that they have been selected by the City to contract for Management Consulting Services. Can you provide additional timeline details for the “Projected award date” at this time?  
Answer: The projected award date is April, 2018.
32. Question: How much lead/response time does the City anticipate allotting to qualified contractors to respond to the specific project following selection of qualified contractors?  
Answer: The city is willing to determine lead time during the negotiations process.
33. Question: Of the six management areas outlined, which one does the following bullet point apply to – ‘Management or strategy consulting, including strategy implementation and execution’?  
Answer: The bullet point applies to consulting, implementation, and implementation as determined during contract negotiations.
34. Question: In Section K. the City states four (4) areas in which the City will be responsible to work with the selected consultant(s). Will the City also be able to make staff available for a

specific project (or projects) to serve in roles that might be typically supported by City staff – such as participating on a Steering Committee, or serving as a Subject Matter Resource (SMR) to assist with validating and/or reviewing the project approach and deliverables?

Answer: Yes

35. Question: Given that the RFQ process as described is intended to assist the City in selecting qualified firms or individuals - and that there would be a subsequent effort to negotiate a contract or contracts with firms or individuals that the City selects - in our response we would provide proposed project staff who represent the qualifications and related experience required for the scope of the corresponding requested services. Final determination of the actual staff to be assigned to a project or projects would be confirmed as part of contract negotiations, as the timeframe in which a negotiated contract would begin is not yet determined, and staff availability may change accordingly.

In turn, if proposed project staff is not fully available during the timeframe of a negotiated project, we would make the effort to include those staff as Subject Matter Resources (SMRs) wherever possible and appropriate. **Please confirm that this approach will meet the requirements of RFQ No. CMGR-180051-GD.**

Answer: Yes as long as project staff is listed in the RFQ

36. Question: “D3. Consultant’s firm shall provide a Dun & Bradstreet report to the city or some other acceptable means for the City to evaluate the firm’s financial stability and reliability.” Is this to be provided with the qualifications or after consultant selection?

Answer: Yes

37. Question: “D4. Consultant’s firm shall provide proof of insurance in a form acceptable to the City, which give the City 30 days’ written notice (except the City will accept ten (10) days’ written notice for non-payment) prior to cancellation or material change in coverage, in the amounts as noted below:” Is this to be provided with the qualifications or after consultant selection?

Answer: After consultant selection

38. Question: “D6. Consultant’s firm shall provide updated contact information for all clients served within the past three (3) years who were provided with the same management consulting services covered under the Statement of Qualifications being submitted.” We have conducted 190 projects within the last three years in the areas on which we are proposing. We will be happy to list the clients. For how many do you want contact information?

Answer: Please provide 3-5 reference of similar management consultant requirements.

39. Question: "A copy of the consultant's current Florida Professional Registration Certificate must be provided. If the consultant is a corporation, it must be chartered to conduct business in Florida." Is this to be provided with the qualification or after consultant selection?

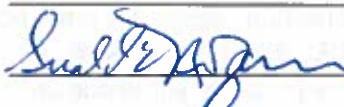
Answer: Yes with the qualification

ACKNOWLEDGMENT: Each Proposer shall acknowledge receipt of this Addendum No. 1 by his or her signature below, **and a copy of this Addendum to be returned with proposal.**

CERTIFICATION BY PROPOSER

The undersigned acknowledges receipt of this Addendum No. 1 and the Proposal submitted is in accordance with information, instructions, and stipulations set forth herein.

PROPOSER: Management Partners

BY:  Gerald E. Newfarmer, President and CEO

DATE: February 5, 2018

# *State of Florida*

## *Department of State*

I certify from the records of this office that MANAGEMENT PARTNERS, INCORPORATED is an Ohio corporation authorized to transact business in the State of Florida, qualified on February 24, 2009.

The document number of this corporation is F09000000741.

I further certify that said corporation has paid all fees due this office through December 31, 2018, that its most recent annual report/uniform business report was filed on January 29, 2018, and that its status is active.

I further certify that said corporation has not filed a Certificate of Withdrawal.

*Given under my hand and the  
Great Seal of the State of Florida  
at Tallahassee, the Capital, this  
the Twenty-ninth day of January,  
2018*



*Ken Deitzner*  
*Secretary of State*

Tracking Number: CC9898041677

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>