



*PROPOSAL TO THE*  
**County of Sonoma**

*TO PROVIDE*  
**Management Review Services**

**BerryDunn**

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Phoenix, AZ 85016  
480.482.3002

**Kevin Price, Principal**

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**Fred Turnier, Project Manager**

[fturnier@berrydunn.com](mailto:fturnier@berrydunn.com)

**Revised Proposal Submitted On:**

April 26, 2022



April 26, 2022

County of Sonoma – Permit Sonoma  
Attn: Yvonne Shu, Analyst  
575 Administration Drive, Suite 104A  
Santa Rosa, CA 95403

Dear Yvonne Shu:

On behalf of Berry Dunn McNeil & Parker, LLC (BerryDunn), I would like to thank you for the opportunity to submit this proposal in response to Sonoma County's (County's) RFP for Management Review Services for Permit Sonoma, the County's consolidated land use planning and development permitting agency.

BerryDunn is a nationally recognized independent management and IT consulting firm founded in 1974 and headquartered in Portland, Maine. We have a dedicated Local Government Practice Group that works with local governments to assess their business processes and systems. In particular, we have a team of consultants who specialize in assisting community development departments to better serve their internal and external customers.

Process mapping, process improvement, and cost of service reviews are core services for BerryDunn. Our proposed team has the background and skills to include the public in this process, embodying the County goal to, *"empower the public through civic engagement and collaboration."*

**Our specialized focus on the public sector affords us a foundational understanding of government operations, business processes, and associated systems.** We work exclusively with government organizations like the County, and each team member has built his/her career on serving the public sector, whether as a direct employee or tangentially. Specifically, our proposed project manager brings direct experience in leading multiple community development departments and has deep expertise in building, inspections, and permitting operations.

As a principal in our Local Government Practice Group, I am authorized to bind BerryDunn to the commitments made herein. Should you have any questions regarding our proposal, please contact me directly.

Thank you for the opportunity to submit this proposal. We look forward to working with you on this important initiative.

Sincerely,

A black rectangular box redacting the signature of Kevin Price.

**Kevin Price, MPP, PMP®, Prosci® CCP**

Principal, BerryDunn

207-541-2379 | [kprice@berrydunn.com](mailto:kprice@berrydunn.com)

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## Section I – Organizational Information

### Firm Overview

BerryDunn is a nationally recognized independent management and IT consulting firm focused on inspiring organizations to transform and innovate. As a Limited Liability Company formed in 1974 with 57 principals, 29 owners, and eight office locations, we have experienced sustained growth throughout our 48-year history.

We employ more than 700 staff members—including more than 250 in our Consulting Services Team. From extensive project experience for more than 400 state, local, and quasi-governmental agencies, our team brings valuable perspectives to every engagement. Additionally, our team has prior experience serving state and local government agencies, providing them with an in-depth understanding of government operations, staffing needs, budgetary constraints, and the business processes required to provide necessary services to the internal divisions and the constituents the County serves.

Our proposed team leadership works within our specialized **Community Development and Utilities Operations (CDUO) Practice** within BerryDunn's Local Government Consulting Practice Group. This practice focuses on assessing municipal and county processes and systems related to land management, permitting, inspections, planning, code enforcement, and asset management functions. Our team will provide in-depth insight informed by years of helping clients assess their technology, plan for the future, and implement new solutions that bring positive change.

The County will benefit from our deep understanding of the government operations, staffing needs, business processes, plans, and programs required to provide necessary services to internal divisions and the constituents you serve. In fact, 75% of the consultants in our Local Government Consulting Practice Area are prior public sector employees, allowing our consultants to provide objective, practical recommendations to clients like the County. They know first-hand what it's like work within local government, on the city and county levels.

Our proposed project manager, Fred Turnier, has served as community development or planning director for multiple cities, including Reno and Fernley, Nevada. Fred is an American Institute of Certified Planners (AICP) Certified planner.

#### BerryDunn at a Glance

**NAME**

Berry Dunn McNeil & Parker, LLC (dba BerryDunn)

**FOUNDED**

1974 as a private LLC

**MAIN CONTACT**

Kevin Price, Principal  
207-541-2379

**HEADQUARTERS**

2211 Congress Street  
Portland, ME 04102

**LOCATIONS**

Maine  
New Hampshire  
Massachusetts  
Connecticut  
West Virginia  
Arizona

**EMPLOYEES**

700+ nationwide

## Key Personnel

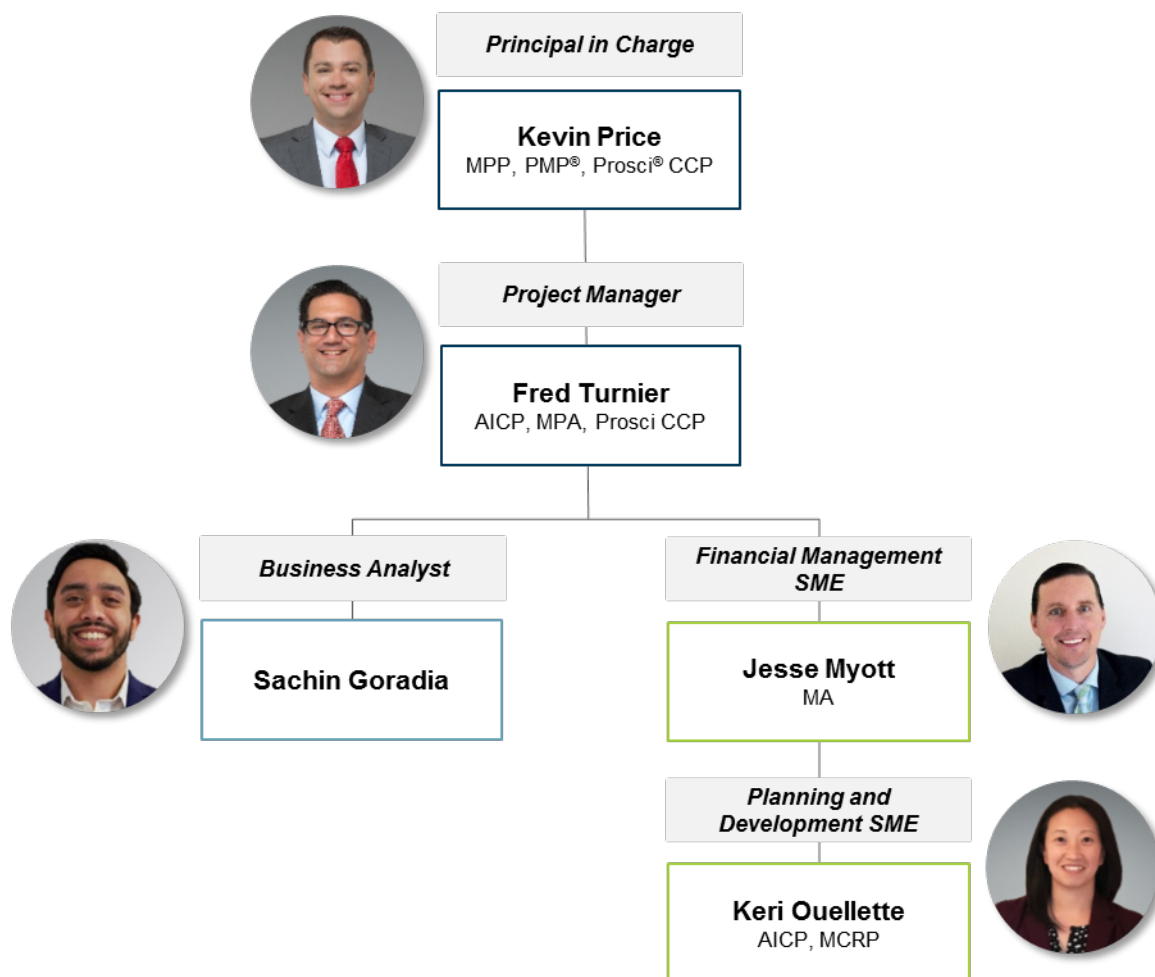
### Organizational Structure

BerryDunn is pleased to introduce a carefully assembled team of project leads, analysts, and subject matter experts (SMEs) to manage the County's initiative. Our proposed consultants will combine backgrounds in public sector planning, permitting and land management, public works, community development, and operations with consulting experience necessary to assess Permit Sonoma's processes, management, and operations, and recommend actionable improvements.

Figure 1 illustrates the structure of our proposed team, followed by individual descriptions of experience, expertise, and project responsibilities. Our team members' full resumes can be found in Section VIII for further insight into backgrounds and project experience.

It should also be noted that we do not intend to subcontract any portion of the County's desired scope of work.

*Figure 1: Project Team Organizational Structure*



## Roles, Responsibilities, and Qualifications

### PRINCIPAL IN CHARGE

*Has overall responsibility for the services we have proposed to the County, ensures the commitment of our firm and appropriate resource allocation, and reviews and approves all deliverables in accordance with BerryDunn's quality assurance processes.*



**Kevin Price, MPP, PMP®, Prosci® CCP**

Kevin is a principal in BerryDunn's Local Government Practice Group. He leads our CDUO Practice, assisting agencies similar to Permit Sonoma with business process improvement, fee analysis, and system selection projects. He has led business process improvement, strategic planning, and system selection projects for some of BerryDunn's most complex local government clients, including Boston, MA; Frisco, TX, Irvine, CA; and Travis County, TX.

### PROJECT MANAGER

*Acts as primary liaison with the County and responsible for maintaining a constructive and clear line of communication between County staff and BerryDunn. Monitors the project progress, tracks the initiation and completion of tasks and milestones.*



**Fred Turnier, MPA, AICP, Prosci® CCP**

Fred is a manager in BerryDunn's CDUO Practice. He has more than 25 years of experience working with local government agencies and extensive experience assisting public-sector entities with project management and development services, business process improvement, fee and cost-recovery analysis, system design and implementation, and policy analysis and formation. He focuses on the areas of community development, planning, building, inspections, code enforcement, business licensing, housing and homeless issues, land management, water quality protection, utilities, and infrastructure planning.

Fred specializes in helping clients improve their ability to provide permitting and development services to their communities. Examples of his clients include Tucson, AZ, Travis County, TX; Schaumburg, IL; and Pitkin County, CO.

### FINANCIAL MANAGEMENT SME

*Provides specialized knowledge and assistance on relevant operations within Permit Sonoma, drawing upon California sector experience, and leads tasks relating to cost recovery and analysis.*



**Jesse Myott, MA**

Jesse brings nearly a decade of public sector experience, focusing on supporting municipalities with operating and capital improvement budget development and management; special fund accounting, revenue and expenditure forecasting; customer valuation; and cost of revenue analyses for town programs and services. His background as a financial and management leader for local government like the Cities of Daly City and South San Francisco, California and Brookline, Massachusetts have given him broad exposure to the services similar to those provided by the County.

Jesse has led or supported several cost recovery, fee study, and process improvement initiatives for clients like Travis County, TX; Villa Park, CA; Manatee County, FL; Gainesville, FL; and Tucson, AZ.



## PLANNING AND DEVELOPMENT SME

*Provides specialized knowledge and assistance on permitting, management, and community development processes, policies, and operations, drawing upon years of experience leading and supporting local government planning departments.*



**Keri Ouellette, MCRP, AICP**

Keri joined BerryDunn's CDUO Practice after working as permitting manager for the City of Portland, Maine, where she gained a broad understanding of the complex issues that municipalities face in addressing growth and managing enforcement.

Thanks to her previous work with New York City's Department of Housing Preservation and Development and the Town of Eastchester, New York, Keri has keen understanding of local government policy development in both small towns and large city agencies. Keri regularly helps clients evaluate processes and leads the development of standard operating procedures to improve efficiency.

Keri is currently managing the development of Bangor, ME's next Comprehensive Plan, as well as playing key roles on process improvement and planning projects with Wilmington, NC; and Attleboro, MA.

## BUSINESS ANALYST

*Supports the project team with facilitating meetings, preparing status reports, and developing project deliverables in a timely manner.*



**Sachin Goradia**

Sachin is a consultant in our Local Government Practice Group with a strong background in advocacy, coordination, and strategic marketing and communication.

Having worked in the public sector, Sachin is well-versed in many aspects of government operations, including policy and strategy formation, business process optimization, and research and trend analysis. He is skilled in legislative analysis and in assisting public-sector clients to comply with local, state, and federal regulations, as well as ethical obligations.

Sachin is currently supporting technology improvement projects with clients such as Clark County, WA; Louisville/Jefferson County Metro Government, KY; Henrico County, VA; Mansfield, TX; and Chesterfield County, VA.

## Section II – Qualifications and Experience

### Commitment to Serving the State

With BerryDunn, you will be served by project team members who have demonstrated their commitment to the State of California (State) through recent or ongoing consulting engagements with the following clients:

- 
- ▶ Alameda Waste Water District
  - ▶ Bay Area Air Quality Management District
  - ▶ California Polytechnic University – Pomona
  - ▶ California State University – Bakersfield, Long Beach, and Los Angeles
  - ▶ California Western School of Law
  - ▶ City of Alameda
  - ▶ City of Belmont
  - ▶ City of Coronado
  - ▶ City of Fountain Valley
  - ▶ City of Irvine
  - ▶ City of La Mesa
  - ▶ City of Livermore
  - ▶ City of Long Beach
  - ▶ City of Novato
  - ▶ City of Oxnard
  - ▶ City of Redding
  - ▶ City of Redlands
  - ▶ City of Santee
  - ▶ City of Simi Valley
  - ▶ City of Villa Park
  - ▶ Claremont University Consortium
  - ▶ Sacramento Metropolitan Air Quality Management District
  - ▶ Sacramento Municipal Utility District
  - ▶ Santa Monica College
  - ▶ Sonoma Resource Conservation District

In addition, through BerryDunn's participation in the annual Municipal Information Systems Association of California (MISAC) and California Society of Municipal Finance Officers (CSMFO) conferences, we stay apprised of trends and new developments that impact the day-to-day operations of the State's municipalities.

Our participation in these conferences include the following past speaking engagements:

- ▶ **2020 CSMFO Annual Conference:** *Change Is Coming: Needs Assessments and Software Planning*
- ▶ **2019 MISAC Annual Conference:** *Integrating Change Management and Project Management*
- ▶ **2019 MISAC Member Webinar:** *Establishing Effective IT Governance*
- ▶ **2018 CSMFO Annual Conference:** *Integrated Point Solutions: The Key to Leveraging Your ERP*
- ▶ **2017 MISAC Annual Conference:** *Modern IT: Position Your Organization to Meet Your Evolving Needs*



## Relevant Experience

### Public Sector Work

Our ability to successfully complete the County's initiative is strengthened by our prior experience providing services, such as those listed in Table 1, ranging from process improvements to fee studies, community development system selection, and operational studies. Engagements with services relevant to the County's requested scope are highlighted in **green**.

*Table 1: Local Government Planning, Permitting, and Community Development Experience*

Client	Worked Performed	Dates
<b>County-Level Clients</b>		
<b>Clark County, WA</b>	Environmental Public Health Business Analyst and Project Manager	01/2022 – present
<b>Dona Ana County, NM</b>	Land Management Consulting Services	06/2021 – present
<b>Lake County, IL</b>	Community Development System Selection	04/2014 – 07/2015
<b>Manatee County, FL</b>	Building and Development Services Fee Study	06/2021 – present
<b>Maui County, HI</b>	Needs Refinement and Permit Software Acquisition	06/2020 – 06/2021
<b>Outagamie County, WI</b>	Permitting, Inspections, and Licensing System Selection	08/2015 – 12/2016
<b>Pitkin County, CO</b>	Community Development System Selection and Implementation Assistance	12/2017 – 06/2020
	Community Development Department Process Review	08/2021 – present
<b>Travis County, TX</b>	Consultation Development Review Process and Fees	12/2020 – Present
<b>Local Government/City Clients</b>		
<b>City of Attleboro, MA</b>	Development Review Process Improvement Services	11/2021 – present
<b>City of Bangor, ME</b>	2022 Comprehensive Plan	12/2021 – present
<b>City of Boca Raton, FL</b>	Community Development System Selection and Implementation Assistance	07/2017 – Present
<b>City of Bozeman, MT</b>	Community Development Review Fee Review Study	09/2020 – 04/2021
<b>City of Beaverton, OR</b>	Community Development Department Organizational Development	09/2019 – 01/2020
<b>City of Beaverton, OR</b>	Electronic Permitting System Consultant	01/2019 – 08/2020

Client	Worked Performed	Dates
City of Broken Arrow, OK	Community Development, Asset Management, and Utility Billing System Implementation Project Management	07/2019 – present
City of Fernandina Beach, FL	Building Department Fee Study	04/2020 – 02/2021
City of Frisco, TX	As-is process diagramming and improvement recommendations for plan review processes Electronic Plan Review (EPR) system selection and implementation oversight	05/2018 – present
City of Gainesville, FL	Building Permit Fee Study	01/2021 – 06/2021
City of Homestead, FL	Workflow and Comparative Fee Analysis	11/2015 – 07/2017
City of Hillsboro, OR	Permitting and Planning Software Consultation	08/2021 – present
City of Irvine, CA	Community Development Permit Software Needs Assessment and Procurement Consulting Services	08/2020 – Present
City of Largo, FL	Permit Fee Study	03/2022 – present
City of Leander, TX	Development Process Review	01/2022 – present
City of Mesquite, TX	Community Development System Selection and Implementation	10/2013 – 10/2015
City of Puyallup, WA	As-Is business process diagramming for community development functions	02/2020 – present
City of Plano, TX	Building Inspections Process Improvement Project	11/2021 – present
City of Rapid City, SD	Community Development Software Selection	01/2014 – 11/2015
City of Richland, WA	Community Development Business Process Review	11/2020 – 02/2021
City of Sioux Falls, SD	EnerGov Review	08/2013 – 02/2015
City of South Jordan, UT	Community Development Implementation Oversight and Public Works Software Assessment Project	11/2015 – 12/2016
City of Tucson, AZ	Permitting System Implementation; Cost-of-Service Study; and Fee Schedule Redesign	12/2018 – 01/2021
City of Tucson, AZ	Planning and Development Services Vision 2024 Strategic Planning Project	07/2021 – Present
City of Wilmington, NC	EnerGov Implementation Project Management	02/2019 – present
Town of Longboat Key, FL	Comprehensive Fee Study	08/2018 – 03/2019

Client	Worked Performed	Dates
Town of Wells, ME	Permitting Process Review	09/2017 – 02/2018
Village of Oak Park, IL	Permitting System Replacement	10/2015 – 03/2016
Village of Schaumburg, IL	Permitting and Inspections Operational Study	02/2021 – Present

## Applicable Systems Exposure

BerryDunn has extensive experience providing a variety of system consulting services related to land management, community development, and permitting, including Accela. In Table 2, we have included a summary of public sector system consulting projects similar in scope to the project requested by the County.

In these engagements, we have worked with departments to understand current development processes, evaluate business and technical needs, develop recommendations for appropriate system solutions, and provide procurement assistance, including RFP development, vendor evaluation and selection, and contract negotiation services. We have also provided the legacy systems in order to offer additional context regarding our experience.

*Table 2: Summary of Relevant Public Sector System Selection Experience*

Client	Project Details	Legacy System
City of Alexandria, Virginia	Our team conducted a needs assessment and replacement consulting for the City's land management, plan review, permitting, and enforcement system. Other project tasks included as-is business process mapping, system replacement consulting services, including the definition of functional and technical requirements, RFP development, and system selection assistance.	Land Management and Permitting (Accela Tidemark)
City of Beaverton, Oregon	BerryDunn worked with the City to provide land management system needs assessment and system selection consulting, which included a current environment assessment and recommendations report, requirements and RFP development, system selection assistance, and contract negotiation assistance.	Community Development (Customized System)
City of Bismarck, North Dakota	The City partnered with BerryDunn for a land records management system study, which included analysis and documentation of code enforcement and permitting processes. Our team develop an RFP and provided procurement assistance after evaluating technical and administrative workflows and developing recommendations for a new permitting system.	Community Development (Non-Integrated Systems)

Client	Project Details	Legacy System
<b>City of Bloomington, Minnesota</b>	BerryDunn provided land management system needs assessment and system selection consulting, including RFP development, system selection assistance, and contract negotiation assistance.	Community Development ( <i>Non-Integrated Systems</i> )
<b>City of Boca Raton, Florida</b>	Our team is currently working with the City to implement a system for land management, planning, permitting, inspections, business licensing, and code enforcement functions, which followed selection activities (requirements definition, RFP development, and procurement assistance).	Community Development ( <i>SunGard HTE</i> ), and Utility Billing ( <i>SunGard HTE</i> )
<b>City of DeSoto, Texas</b>	BerryDunn conducted an assessment of current software needs and assisted the City with the development of a RFP and selection of a replacement software vendor.	ERP ( <i>STW</i> ), Community Development ( <i>iWorQ</i> )
<b>City of Farmers Branch, Texas</b>	BerryDunn helped the City define requirements and release an RFP to select an enterprise system replacement, to include planning and permitting as functional areas. Our team is currently helping the City implement its chosen solution.	Community Development ( <i>MyGov</i> ), and Utility Billing ( <i>SunGard HTE</i> )
<b>City of Frisco, Texas</b>	Our team provided electronic plan review (EPR) system consulting, including as-is process diagramming, options analysis, and system selection assistance.	Land Management ( <i>CentralSquare TRAKiT</i> and <i>Hyland OnBase</i> )
<b>City of Homestead, Florida</b>	To help the City choose a system for land management, permitting, inspections, code compliance, and business licensing. Project tasks included a needs assessment, current workflow review and recommendations for improvement, fee study analysis report, and defining functional and technical requirements.	Community Development ( <i>SunGard Community Plus</i> )
<b>City of Hillsboro, Oregon</b>	BerryDunn conducted an assessment of current software needs and assisted the City with the development of a RFP. The RFP was recently issued and BerryDunn is providing assistance during the selection process.	Community Development ( <i>Accela Automation</i> )
<b>City of Mesquite, Texas</b>	BerryDunn lead a land management and community development system needs assessment and system selection project, which included RFP development, system selection assistance, and contract negotiation assistance.	Community Development ( <i>Non-Integrated Systems</i> ), Utility Billing ( <i>SunGard HTE</i> )

Client	Project Details	Legacy System
<b>City of Midvale, Utah</b>	Our team conducted an assessment of core business information software and workflow processes to determine gaps and efficiencies that might be obtained with different software or better utilization of existing software. This project involved an evaluation of the City's business processes, technology systems and needs, development of a Request for Information, and development of an Action Plan Report.	ERP (Caselle Connect) and Asset Management (iWorQ)
<b>City of Richland, Washington</b>	BerryDunn conducted an ERP gap assessment, process diagramming, and RFP development project. We are currently providing implementation project oversight during the implementation of the City's selected replacement systems.	ERP (Harris GEMS), Permitting (Blue Prince), and Code Enforcement (iWorQ)
<b>City of Sioux Falls, South Dakota</b>	Our team led a workflow and business process review and system needs assessment to develop requirements and an RFP for a new City-wide planning and zoning, code enforcement, permitting, and licensing system. Following the release of the RFP, we assisted the City with vendor demonstrations.	Land Management ( <i>SunGard HTE</i> )
<b>City of South Jordan, Utah</b>	The City contracted BerryDunn to conduct a needs assessment as part of its land management system selection consulting initiative.	Land Management and Asset Management ( <i>Cartegraph</i> )
<b>City of Surprise, Arizona</b>	BerryDunn provided system selection consulting services for a land management system. Project activities included a needs assessment relating to permitting and inspection business functions, including business process analysis and vendor research.	Community Development ( <i>Custom-Developed Application</i> ), and Utility Billing ( <i>American Water Third-Party System</i> )
<b>City of Tucson, Arizona</b>	To help the City select and implement a new community development system, BerryDunn conducted a needs assessment, developed an action plan, defined requirements, developed the RFP, assisted with system selection activities, and provided contract negotiation assistance.	Community Development ( <i>Accela Permits Plus</i> )
<b>City of Wilmington, North Carolina</b>	To assist the City in selecting and implementing an enterprise system, including planning, permitting, code enforcement, and inspections as functional areas, BerryDunn conducted a current environment needs assessment, defined requirements, developed an RFP, facilitated selection activities, and guided contract negotiation.  Our team is currently assisting with the implementation of the City's chosen system.	Community Development and Asset Management ( <i>SunGard HTE</i> )

Client	Project Details	Legacy System
<b>Clark County, Washington</b>	BerryDunn is currently assisting the Clark County Public Health Department with a system replacement project to select and implement a new system to manage public health permitting and enforcement processes.	Public Health Permitting ( <i>Accela EnvisionConnect</i> )
<b>Lake County, Illinois</b>	BerryDunn provided needs assessment and replacement consulting services to help the County choose a new land management, code enforcement, and permitting system.	Community Development ( <i>Infor Hansen</i> )
<b>New Kent County, Virginia</b>	BerryDunn conducted an Enterprise Resource Planning (ERP) needs assessment project that included conducting a current environment assessment and development of functional and technical requirements for a replacement system.	ERP ( <i>BAI</i> ) and Asset Management ( <i>iWorQ</i> )
<b>Outagamie County, Wisconsin</b>	Our team provided system needs assessment and replacement consulting services to help the County select a new permitting, inspections, and licensing system.	Community Development ( <i>Non-Integrated Customized Systems</i> )
<b>Pitkin County, Colorado</b>	The County requested the completion of a needs assessment, definition of functional and technical requirements, RFP development, and system selection assistance as part of replacing its permitting system. The County replaced their legacy system with support from BerryDunn.	Community Development ( <i>Tyler Technologies Eden and BlueBeam</i> )
<b>Village of Oak Park, Illinois</b>	The Village partnered with our team to acquire a new permitting system. BerryDunn led a needs assessment, defined functional and technical requirements, developed an RFP, and provided system selection assistance.	Community Development ( <i>Accela Tidemark</i> )



## References

### Travis County, Texas

#### *Consultation Development Review Process and Fees*

##### **Contact**

Anna Bowlin, Director of  
Development Services  
Tel: 512-854-7561

Email:

[anna.bowlin@traviscounty.gov](mailto:anna.bowlin@traviscounty.gov)

**Kevin Price, Fred Turnier, Keri Ouellette, and Jesse Myott** worked on this project.

In late 2020, Travis County contracted BerryDunn to conduct a review of Development Services' management processes and fees. Development Services is a division of the County's Transportation and Natural Resources (TNR) and reviews all applications for development in unincorporated areas of Travis County.

The County sought a consultant who could review the existing development review and permitting processes to identify opportunities to facilitate a more cost-effective process that is within the statutory authority of the respective governmental authorities. The County also

requested a fee recommendation to recapture the costs associated with the development process and services and recommendations for management best practices regarding the regular review and updates of fees going forward.

To complete the County's desired scope, BerryDunn led business process review services to capture the current state, gather input on the desired future state of processes as well as identify cost of service and provide recommendations for more efficient fee structures. Our approach included business process mapping, a user fee study, and robust external engagement components that involved both internal stakeholders and external community partners. Our team has been able to stay on schedule and is in the process of assessing the County's cost of service and will be presenting a final report to the Commissioners' court in the next three months. There have been no contract amendments or change orders, and the project remains on budget.

### Village of Schaumburg, Illinois

#### *Permitting and Inspections Operations Study*

##### **Contact**

Julie Fitzgerald, Community  
Development Director  
847-923-3867

[jfitzgerald@schaumburg.com](mailto:jfitzgerald@schaumburg.com)

**Kevin Price, Fred Turnier, and Keri Ouellette** worked on this project.

BerryDunn recently completed an operational and organizational assessment of the Village's Community Development Department, examining the current state of the CDD's management structure, staffing, operations, technology, and internal systems. The Village aimed to streamline its ability to process permits, communicate with customers more efficiently, and plan staffing resources more effectively, particularly in response to any necessary technology changes. The ultimate goal for the project is to provide a prioritized matrix to guide the Village as it

implements recommended improvements to its current environment.

The Village communicated its appreciation for our team's approach of splitting the current environment assessment from final recommendations while still maintaining the desired timeline and budget. The as-is diagrams in particular enabled us to clearly communicate how we developed each recommended change and the link to existing CDD processes.

## City of Frisco, Texas

*Business Process Analysis, As-Is Process Diagramming, EPR Recommendations and System Selection Assistance, EPR Implementation Oversight*

### **Contact**

Chris Leonard, Senior Planner  
972-292-5361  
[cleonard@friscotexas.gov](mailto:cleonard@friscotexas.gov)

**Kevin Price and Fred Turnier**  
*worked on this project.*

The City of Frisco engaged BerryDunn to evaluate the City's readiness for transitioning to an EPR system. BerryDunn assisted the City with documenting and assessing the City's current plan review processes. This project included a review of technology tools used to support these processes, as well as an as-is process diagramming exercise. These included processes and sub-processes for planning, engineering construction, building, environmental services, fire, parks, public works,

traffic engineering, storm water, and communications. This project focused on identifying opportunities for improvement in the current environment and in a future EPR system environment. In addition to developing the as-is process diagrams, BerryDunn developed a Process Diagrams Analysis Report and an EPR Recommendations Report.

BerryDunn's Process Diagrams Analysis Report included:

- An analysis of current plan review processes for each department (building, parks and recreation, public works, communications, etc.)
- Review of current technical environment
- Primary challenges the City faced with current tools and processes

BerryDunn's EPR Recommendations Report included:

- Future environment recommendations for improving current processes
- Resource considerations for each phase of the City's planned EPR implementation
- Training and education opportunities customized to meet the City's needs
- Change management practices to prepare City staff to undertake the significant change of a system change

After the business process analysis, as-is diagramming, and EPR recommendations, the City contracted BerryDunn to assist with the selection and implementation of Avolve Online Application Submittal (OAS) and ProjectDox. This seamless transition allowed us to continue providing the City with recommendations specific to its staff and community needs. BerryDunn is currently providing implementation project oversight during the City's Avolve ProjectDox and OAS system implementation.

## Debarment or Other Disqualification

BerryDunn has had no order, judgment, or decree of any federal or state authority barring, suspending, or otherwise limiting our right to engage in any business, practice, or activity.

## Section III – Project Approach and Work Schedule

### Overview

BerryDunn strives to be flexible when it comes to developing and executing an effective work plan. We understand that no two projects are exactly alike, and our past clients have appreciated our willingness to adapt to their needs. This mindset plays a foundational role in how we measure the success of our portfolio of similar projects.

Our approach to conducting a management review of Permit Sonoma is outlined to the right, designed to incorporate consistent project management best practices with each of the County's key deliverables and tasks.

Our intent through each phase is to work with County staff to help ensure we make best use of your time during engagement and review sessions. Ultimately, consistent collaboration can help promote buy-in and understanding for final recommendations and suggestions for improvement.

You can expect our approach to include the following attributes:

- ▶ A methodology based on our extensive experience conducting similar process review projects
- ▶ Quality assurance (QA) processes that incorporate the County review and approval of all deliverables and key milestones
- ▶ Built-in project management and change management best practices that focus on keeping the project on time and on budget, and progressing at a healthy pace for the County stakeholders to give input in the fact-finding process, and understand final recommendations



## Work Plan

### Phase 1: Project Initiation and Management

#### **1.1 Facilitate project-planning teleconference with County Administrator's Office (CAO)**

**Project Manager.** During this initial project planning session, we will review our proposed work plan and schedule, clarify goals and objectives, identify known project constraints, and refine dates and/or tasks as appropriate. As part of this meeting, we will also discuss our approach to managing communications between BerryDunn and the County, as well as our approach to scope, risks, and resource management. During this meeting we will also work with the CAO Project Manager to identify activities where the County feels that an in-person presence is required or will improve stakeholder participation.

**1.2 Develop draft Project Work Plan and Schedule.** Based on the information gathered from our project planning call, BerryDunn will develop the Project Work Plan and Schedule, which will outline our communication and scope, risk, resource management approaches; include a timeline to schedule project meetings; and identify County project management team members.

The Project Work Plan and Schedule will incorporate agreed-upon procedures between BerryDunn and the CAO related to project control, including quality management and deliverable submission/acceptance management.

We will solicit feedback from the County during a review teleconference, and deliver the final Project Work Plan and Schedule after implementing requested changes.

#### *Deliverable 1: Project Work Plan and Schedule*

**1.3 Develop and issue and information request to the CAO.** To prepare for our assessment activities and the project kickoff, we will collect and review materials relevant to the project's scope. These materials will include, but not be limited to the following:

- ▶ Relevant operating agreements between the County and other jurisdictions, including cities
- ▶ Organization charts for Permit Sonoma's six divisions (Administration, Code Enforcement, Engineering and Construction, Fire, Planning, and Resiliency)
- ▶ Existing flowcharts for each division, process documentation and related materials
- ▶ Any existing and relevant technology system profiles, flowcharts, and data diagrams
- ▶ Relevant internal policies and procedures
- ▶ Sample forms and supporting documents
- ▶ Related performance measures and work management metrics
- ▶ Previous internal or external studies, activity reports, etc.
- ▶ Existing cost-of-service studies and/or related fee-setting analysis

#### **1.4 Facilitate virtual project kickoff presentations with internal and external stakeholders.**

These kickoff presentations will serve as an opportunity to introduce project team members, discuss goals, present our project approach and methodology, review the schedule of key project dates, and answer questions. We have planned to conduct two project kickoff presentations via web conference.

**1.5 Develop Monthly Status Reports.** Throughout the project, the BerryDunn project manager will provide Monthly Project Status Updates that describe the activities and accomplishments for the reporting period, plans for the upcoming month, risks or issues encountered during the reporting period, and anticipated problems that might impact any project deliverable.

#### *Deliverable 2: Monthly Status Reports*

## Phase 2: Service Delivery and Analysis

**2.1 Distribute questionnaire to capture service inventory and life cycles.** Our data request will allow our team to approach the service inventory with key contextual knowledge of each division's service line. To complement this, we will develop and distribute a service questionnaire in coordination with the CAO Project Team. Areas of recommended focus in the questionnaire include:

- ▶ Division-specific lines of service
- ▶ Service descriptions (customers, number of service requests/period)
- ▶ Dependent factors on level of service

We recommend distributing the questionnaire to supervisory staff, as well as identified support staff in each division in order to capture a full inventory.

**2.2 Assess customer service culture.** This assessment will aim to measure how Permit Sonoma supports customers through seamless access mechanisms such as website portal, contract guide, submission systems, and front desk interactions. We will work with division heads and supervisory staff to create a customer service framework, intended to reduce quality of service variation based on best practice methods. This includes ensuring that back-of-house internal support (such as technology, finance, and HR) provide seamless service to customer-facing areas of Permit Sonoma's operations. We will also review any ongoing customer service training provided, and can supplement with additional training and development programs.

**2.3 Conduct customer service-focused interviews.** Internal organizational culture impacts a department's ability to provide excellent service, both internally and externally. As a result, we will review the overall customer service system. This includes meeting with division staff who are directly engaged with customers, reviewing customer satisfaction results, and reviewing how customer satisfaction is measured. We will also meet with external stakeholders identified in collaboration with the CAO Project Team. This activity may be conducted virtually or using a hybrid approach. Should the County determine that the activity be conducted in-person, BerryDunn would plan to schedule these interviews over a two-day period.

**2.4 Develop Service Delivery Summary.** We will summarize our findings into a Service Delivery Summary report, which will be reviewed with the CAO Project Team via teleconference. Following updates, we will submit the summary to the County in final form.

**2.5 Conduct project check-in with the Project Sponsor.** Before closing out Phase 2, we will complete a virtual project check-in meeting with the Project Sponsor. The purpose of this check-in meeting will be to review phase activities and deliverables, and review the planned approach for Phase 3.

#### *Deliverable 3: Service Delivery Summary*



## Phase 3: Organizational Structure Assessment

**3.1 Develop draft job analysis questionnaire, and review the draft with the CAO Project Team to update to final.** We will customize a job analysis survey to assess the following areas:

- ▶ *Human Resources and employment practices*
  - Employee satisfaction per division
  - Job classifications that inform hiring practices
  - Employee engagement, collaboration and cooperation
  - Accountability for performance
  - Leadership development
  - Orientation and learning programs
- ▶ *Structure*
  - Reporting structure per division
  - Span of control
  - How the structure impacts service delivery
  - Workflow within divisions as well as vertically and across the organization
- ▶ *Staffing and Capacity*
  - Roles and responsibilities per division
  - Succession
  - Possible consolidation of functions
  - Use of best practices
  - Continuous improvement and innovation
  - Employee perception of division
  - Safety and regulatory policies
- ▶ *Leadership System (recommended)*
  - Deploying mission, vision, and values
  - Reviewing how leadership establishes ongoing annual work plans and future strategic direction
  - Measuring organizational performance
  - Developing existing leaders and future leaders
  - Emphasizing best practices, which can include the Department's efforts in leveraging technology, use of data for decision management, DEI, knowledge management, change management, innovation, talent management, sustainable practices, and investment in employees
  - Reviewing management and administrative policies

We will then review the draft survey with the CAO Project Team to solicit feedback and update to final.

*Deliverable 4: Job Analysis Questionnaire*

**3.2 Administer job analysis questionnaire, analyze results, and document findings.** We will administer the job analysis questionnaire for employees to complete, which will provide our team with additional information that includes areas such as process efficiencies, communication patterns, and critical relationships. Data collected will be synthesized with information gathered during our document review and used as the basis for protocols developed for focus groups and interviews.

**3.3 Conduct staff and stakeholder meetings.** These meetings will help our team develop best practice approaches based on our objective assessment, our personal experience leading organizations, information gleaned from our research and meetings, and what we have seen in other agencies. We will also want to develop recommendations based on ensuring excellent service delivery to residents.

We will begin the process by meeting with division heads and all supervisory staff to gain perspectives of strengths and weaknesses of the organizational structure. We will follow this meeting with three focus groups of non-supervisory departmental staff.

We will conduct focus groups and interviews with key staff and stakeholders for each division in Permit Sonoma. Based on input from the County, we may also plan to include County administration officials and non-Permit Sonoma stakeholders such as staffing in Human Resources and IT.

This activity may be conducted virtually or using a hybrid approach. Should the County determine the activity be conducted in-person, we would coordinate these meetings with our cost of service (Phase 4) interviews.

**3.4 Summarize engagement findings.** We will synthesize information gathered on the current state and input from the focus groups and interviews and document our findings in an Organizational Structure Summary, which will be integrated into our final recommendations and analysis.

**3.5 Conduct project check-in with the Project Sponsor.** Before closing out Phase 3, we will complete a virtual project check-in meeting with the Project Sponsor. The purpose of this check-in meeting will be to review phase activities and deliverables, and review the planned approach for Phase 4.

*Deliverable 5: Organizational Structure Summary*

## Phase 4: Operations Assessment and Cost Recovery Analysis

**4.1 Review workflow processes and resource allocation.** The job analysis questionnaire from the previous phase will provide information to inform a review of workflow processes and resource allocation across divisions. Working in collaboration with staff, key processes will be reviewed for each division. Through the process of discovery in previous tasks, other key tasks will be identified. Standard Operating Procedures (SOPs) and manuals will be reviewed.

Our team will work with supervisory staff to review our findings. Recommendations for strengthening the operating structure and distribution of resources will be discussed with leadership and will result in a narrative outlining initiatives for strengthening the system, taking into account today's operating environment as well as into the future.

**4.2 Evaluate technology needs and resources.** We will review the technology usage across divisions and then identify tools, workflows and reports within the existing program that are not being utilized and could improve Permit Sonoma management. Our recommended enhancements/improvements will align with those developed for organizational structure.

### Cost of Service Tasks

**4.3 Interview staff and stakeholders.** We will conduct a series of interviews with staff and stakeholders remotely via video conference. Our goal during these meetings will be to gain an understanding of the general process and steps necessary to process each permit application, conduct plan reviews and deliver planning services, deliver engineering services, and conduct inspections and determine the approximate level of staffing effort and resources necessary. This information will inform our understanding and analysis of the current fee structure and, where necessary, provide a foundation for recommendations pertaining to adding, revising, or eliminating fee and/or service types.

This activity may be conducted virtually or using a hybrid approach. This task would be coordinated with any pre-determined in-person activities from Phases 2 and 3.

#### **4.4 Review applicable fee schedules.**

We will conduct a comprehensive review of the County's existing fees and charges schedules. In doing so we will organize fees into select service categories which will allow us to more accurately assign revenues and expenses to specific services as identified in subsequent tasks. Additionally, this will provide the framework upon which an updated fee schedules will be created.

**4.5 Review applicable operating and capital budgets.** We will review the annual operating and, if applicable, capital budgets for the all departments/divisions encompassed in the study. This task will include a review of budgeted revenues, and operating and capital expenses on a select fiscal year basis. Furthermore, where applicable, this task will also include a review of actual revenues, and operating and capital expenses on a select fiscal year basis.

**4.6 Conduct a personnel analysis.** Based on our interviews with staff and stakeholders and our review of personnel budgets and rosters in the previous task, we will identify all staff providing direct building, planning, and engineering services. We will work with select staff to determine estimated time spent on building permit application review, issuance and inspection, plan review and planning service delivery, engineering review and engineering service delivery, and any other applicable service provided. This information will help us begin assessing and calculating personnel costs associated with service delivery.

**4.7 Project full-cost for providing services.** The goal of this task will be to determine the total projected cost of all applicable building, planning, and engineering operations and service provision for a selected fiscal year (specific year to be defined in collaboration with the County project team). As a starting point, we will use data and insight gained from reviewing the operating and capital budgets and conducting the personnel services analysis listed above.

Using this data and information, we will develop and prepare a comprehensive cost model that calculates, identifies, totals, and distributes allowable direct and indirect costs to all applicable services.

In order to accurately and reasonably do so, the model will, at a minimum, calculate and identify:

- ▶ *Total costs:* Using information provided by the County we will determine total costs for each budget and / or accounting segment applicable to identified permits and services.
- ▶ *Unallowable and excluded costs:* Building off the analyses undertaken by determining total costs in the previous bullet point, we will determine all unallowable costs, excluded costs and any other distorting items, and remove them from the model's calculations.
- ▶ *Direct costs:* We will determine all costs that can be tied specifically to a permit or service and therefore may be assigned as an expense.
- ▶ *Indirect costs:* We will determine all costs incurred for a common or joint purpose benefiting more than one service, primarily by reviewing the County's current cost allocation plan, if applicable, or using pre-assigned calculated costs, or working with staff to determine appropriate indirect cost amounts to assign and to calculate an indirect cost rate.

We will reconcile all identified expenditures from the previous tasks to select financial statements and/or budget documents, working with staff to develop explanations for material variances. We will then work with County staff to solicit and review any additional financial information necessary to calculate direct costs, and identify allowable countywide indirect costs.

The County will be responsible for providing all financial information for review and agreed-upon assumptions pertaining to budget and actual data. Completion of this task will provide the foundation for assessing current cost recovery and fee levels, and calculating new fee levels, where applicable.

**4.8 Recommend methodologies for calculating fees and the amount of each fee.** Based on the work completed in previous tasks, we will provide the County with recommendations for calculating fees to offset identified costs. Using the calculated cost recovery percentage as a starting point, we will work with County staff to identify cost recovery targets and provide consultative recommendations for how the County may arrive at the desired targets by setting fees at specific levels. We will also provide the County consultative recommendations pertaining service types where it is not feasible to recover the full cost of providing the service, and also identify those instances where full cost recovery is attainable, and also identify and recommend fees for services the County is currently providing but for which no fee is currently assessed.

#### *Deliverable 6: Cost of Service Analysis*

### **Comparative Fee Analysis Tasks**

**4.9 Conduct comparative fee analysis and benchmarking exercise.** We will survey three comparable cities or counties in an effort to compare the County's fees and charging methodologies with those of its peers and to gain insight on comparative market trends. Furthermore, we will include additional select community characteristics criteria to reflect as closely as possible the unique elements found throughout the County of Sonoma community.

**4.10 Provide additional consultative recommendations.** We will offer analysis, insight, and/or recommendations on any additional, applicable matters that may arise throughout the course of the project. Specific items may include, practices and trends observed in other communities we have worked with, budgetary and fiscal considerations, applicable best practices observed in other communities, specific fee, technology, and/or business process improvements for consideration.

#### *Deliverable 7: Peer Comparisons and Professional Considerations*

**4.11 Develop Organizational and Operational Summary.** We will create a report documenting the findings of our operations assessment, cost of service analysis, and comparative fee analysis, integrated into results from the previously developed Organizational Assessment Summary. We will present our draft report to the City's project team and engage the team in a discussion of the data, our conclusions, and how we will use the information from the review to develop the Final Management Recommendations Report in Phase 6.

**4.12 Conduct project check-in with the Project Sponsor.** Before closing out Phase 4, we will complete a virtual project check-in meeting with the Project Sponsor. The purpose of this check-in meeting will be to review phase activities and deliverables, and review the planned approach for Phase 5.

*Deliverable 8: Organizational and Operational Summary*

## Phase 5: Best Practices and Benchmark Analysis

**5.1 Conduct best practice research to highlight innovative programs or processes from other jurisdictions and identify benchmark data.** BerryDunn will identify three benchmark organizations based upon our data review and observations thus far of Permit Sonoma. We will research the organizational structures and operations of the comparable organizations, including historical and projected staffing levels, business process improvements and best practices they have implemented; IT and applications they have employed; cross-functional alignment across divisions; customer service delivery; and any performance data they are able to provide. We will use a combination of interviews and data reviews to complete our analysis.

This activity will help Permit Sonoma benchmark its services, identify high performance indicators, and conduct an analysis as it relates to national and regional trends.

**5.2 Conduct benchmark gap analysis.** Using findings from the benchmark analysis as a guide, BerryDunn will conduct a gap analysis to determine differences between current state use of tools and processes and industry best practice. This analysis will help our consultants to identify projects and initiatives for inclusion in the final Recommendations Report. We will conduct this analysis using data from our review, stakeholder interviews, and questionnaires.

**5.3 Summarize findings in a Best Practices and Benchmark Summary.** We will develop a summary of findings and review with the CAO Project Team before updating to final.

**5.4 Conduct project check-in with the Project Sponsor.** Before closing out Phase 5, we will complete a virtual project check-in meeting with the Project Sponsor. The purpose of this check-in meeting will be to review phase activities and deliverables, and review the planned approach for Phase 6.

*Deliverable 9: Best Practices and Benchmark Summary*

## Phase 6: Final Recommendations

**6.1 Develop draft Final Report and Summary.** We will recommend a detailed list of actions Permit Sonoma can take to improve management processes and service delivery. Specifically, the report will identify areas in which the Permit Sonoma can eliminate inefficiencies and improve personnel productivity, highlight processes to enhance operational controls and quality service, and suggest organizational enhancements that will best leverage division personnel skillsets and abilities.

*Deliverable 10: Draft Report and Summary*

**6.2 Review Draft Report and Summary with the CAO Project Team and develop Implementation Strategies.** We will review the draft report with the CAO Project Team to solicit feedback, and review proposed implementations strategies our team will develop. We are extremely interested and experienced in working with staff to successfully implement proposed recommendations to improve the organization. We will plan to include a section in the Final Report that will provide detailed steps for successful implementation.

*Deliverable 11: Implementation Strategies*

**6.3 Develop final presentation and review with the Board of Supervisors.** We will develop an Assessment Presentation to deliver our findings to the Board of Supervisors. We will review the Assessment Presentation with the CAO Project Team to solicit feedback and update to final.

**6.4 Deliver Assessment Presentation to communicate key findings to County leadership.** We will deliver our finalized Assessment Presentation to the Board of Supervisors, focusing on communicating our overall recommendations implementing improve service and operational functions. By delivering this presentation to the Board, we will build consensus and promote buy-in for the actions to guide Permit Sonoma.

*Deliverable 12: Presentation to Board of Supervisors*

**6.5 Deliver Final Report.** We will integrate any final feedback into our Final Report as a result of our presentation to the CAO Project Team, and update the report to final.

*Deliverable 13: Final Organizational and Operational Assessment Report*

## Work Schedule

On the following page, we have included a timeline of milestones per proposed project phase. This was developed to align with the schedule included in the RFP, with targeted completion date of August 29, 2022 for a draft report, with delivery of a final report on September 26, 2022. We will review a detailed timeline during initial planning and adjust according to your team members' availability, holiday/vacation schedules, and other project constraints.



Permit Sonoma  
Management Review  
Timeline

2022

May

June

July

August

Sept

Oct

**Phase 1: Project Initiation and Management**

**Milestones:**

Contract award: May 24

Planning call (CAO Project Team): June 3

Kickoff (CAO Project Team, others as identified): May 17

Project status updates (CAO Project Manager): Ongoing monthly

**Phase 2: Service Delivery Analysis**

**Milestones:**

Questionnaire review (CAO project team): June 20

Responses to questionnaire (Permit Sonoma staff): June 27 - July 15

Customer service interviews (division heads, CAO Project Team): Week of July 18

Service Delivery Summary review (CAO Project Team): July 29

**Phase 3: Organizational Structure Assessment**

**Milestones:**

Questionnaire review (CAO Project Team): August 1

Responses to questionnaire (Permit Sonoma staff): August 8 - 19

Staff and stakeholder interview: Week of August 22

Organizational Structure Summary review (CAO Project Team): September 2

**Phase 4: Plan Report and Presentation of Findings**

**Milestones:**

Cost of service interviews (division staff): Week of August 22

Organizational and Operational Summary review (CAO Project Team): September 2

**Phase 5: Best Practices and Benchmark Analysis**

**Milestones:**

Best Practices and Benchmark Summary review (CAO Project Team): September 16

**Phase 6: Final Recommendations**

**Milestones:**

Draft Report and Summary review (CAO Project Team): September 30

Board of Supervisors Presentation: October 25

## Section IV – Fee Proposal

Our proposed fee reflects the level of effort we believe is required to complete the requested scope. Other factors that contributed to this fee include:

- ▲ Our detailed work plan narrative presented in our proposal
- ▲ Our staffing plan and resource allocation, which provides the County with the appropriate number of resources and a level of expertise to complete the tasks presented
- ▲ Our experience conducting projects of similar scope and size

We have proposed to complete this project following a hybrid approach with some activities conducted in-person and some activities conducted virtually. We have included an allocation of \$5,000 for travel as part of our fees. Any travel expenses exceeding \$5,000 will be billed as-incurred.

In Table 3, we have outlined our fees per deliverable.

*Table 3: Total Fees by Project Deliverable*

No.	Project Deliverable	Fee
1	Project Work Plan and Schedule	\$3,200
2	Monthly Status Reports	\$6,700
3	Service Delivery Summary	\$17,900
4	Job Analysis Questionnaire	\$6,340
5	Organizational Structure Summary	\$16,060
6	Cost of Service Analysis	\$17,820
7	Peer Comparisons and Professional Considerations	\$5,420
8	Organizational and Operational Summary	\$4,360
9	Best Practices and Benchmark Summary	\$8,560
10	Draft Report and Summary	\$9,200
11	Implementation Strategies	\$4,880
12	Presentation to Board of Supervisors	\$5,260
13	Final Organizational and Operational Assessment Report	\$3,200
	<b>Total Fee</b>	<b>\$108,900</b>

Our fee proposal assumes that satisfying a deliverable is based on the County's signed acceptance. We will progressively bill the County on a monthly basis for work completed against each project phase and deliverable in the previous month. We will work with the CAO Project Manager and CAO Project Team to update our deliverables as required until they are accepted by the County. The County will not incur any additional costs associated with the process of reaching deliverable acceptance

In Table 4, we have provided a list of our hourly rates by project personnel.

*Table 4: BerryDunn Project Personnel Hourly Rates*

Project Personnel	Hourly Rate
Project Principal	\$340
Project Manager	\$250
Business Analyst	\$140
Subject Matter Expert	\$240

## Section V – Identification of Subcontractors

BerryDunn is not proposing subcontractors as part of our team for the County's initiative.



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

4/29/2021

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> <b>Clark Insurance</b> 1945 Congress Street, Bldg A PO Box 3543 Portland, ME 04104-3543	<b>CONTACT NAME:</b> Heather Caston-Talbot, AAI, CIIP, CIC	
	<b>PHONE (A/C, No, Ext):</b>	<b>FAX (A/C, No):</b>
	<b>E-MAIL ADDRESS:</b> hcaston-talbot@clarkinsurance.com	
	<b>INSURER(S) AFFORDING COVERAGE</b>	
	<b>INSURER A :</b> Hanover American	<b>NAIC #</b> 36064
	<b>INSURER B :</b> Massachusetts Bay	<b>22306</b>
<b>INSURED</b> <b>Berry Dunn McNeil &amp; Parker LLC</b> PO Box 1100 Portland, ME 04104	<b>INSURER C :</b> The Hanover Insurance Company	<b>22292</b>
	<b>INSURER D :</b> MEMIC Ind. Co	<b>11030</b>
	<b>INSURER E :</b>	
	<b>INSURER F :</b>	

## COVERAGES

## CERTIFICATE NUMBER:

## REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> GL form CG 00 01 GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJECT <input checked="" type="checkbox"/> LOC OTHER:			ZZP D240054	4/30/2021	4/30/2022	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 15,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
B	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			ADPD240058	4/30/2021	4/30/2022	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ <b>Hired Auto P.D.</b> \$ 50,000
C	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ 0			UHP D240055	4/30/2021	4/30/2022	EACH OCCURRENCE \$ 8,000,000 AGGREGATE \$ 8,000,000
D	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input checked="" type="checkbox"/> Y / N If yes, describe under DESCRIPTION OF OPERATIONS below		N/A	3102800540	1/1/2022	1/1/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)  
 30 day notice of cancellation with 10 days notice for non-payment of premium, if required by written contract/agreement.

## CERTIFICATE HOLDER

## CANCELLATION

<b>Berry Dunn McNeil &amp; Parker, LLC</b> 2211 Congress Street Portland, ME 04102	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE 



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
06/04/2021

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

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<b>PRODUCER</b> Affinity Insurance Services 1100 Virginia Drive, Suite 250 Fort Washington, PA 19034	<b>CONTACT NAME:</b>	
	<b>PHONE (A/C, No, Ext):</b>	<b>FAX (A/C, No):</b>
<b>INSURED</b> Berry Dunn McNeil & Parker LLC PO Box 1100 Portland, ME 04104	<b>E-MAIL ADDRESS:</b>	
	<b>INSURER(S) AFFORDING COVERAGE</b>	
	<b>INSURER A:</b> Continental Casualty Company	
	<b>INSURER B:</b>	
	<b>INSURER C:</b>	
	<b>INSURER D:</b>	
	<b>INSURER E:</b>	
<b>INSURER F:</b>		

**COVERAGES**      **CERTIFICATE NUMBER:**      **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below Y/N <input type="checkbox"/> N/A						PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Professional Liability			APL-188112791	04/01/2021	04/01/2022	Per Claim/Aggregate Limit \$1,000,000 / \$1,000,000 Limits shown as requested.

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

<b>CERTIFICATE HOLDER</b> Berry Dunn McNeil & Parker, LLC 2211 Congress Street Portland, ME 04102	<b>CANCELLATION</b> SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
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## Section VII – Section VII – Accessibility Standards

Because this project will not involve preparing content intended for use or publication on a County-managed or County-funded website, BerryDunn indicates that our capacity and compliance at this time is not applicable.



## Section VIII – Resumes



**Kevin Price, MPP,  
PMP®, Prosci CCP®**  
*Project Principal*

### Education and Certifications

Masters, Public Policy  
and Management,  
Concentration in  
Financial  
Management,  
University of Southern  
Maine

BA, Economics and  
Political Science,  
University of Maine  
Project Management  
Professional (PMP®),  
Project Management  
Institute

Prosci® Certified  
Change Practitioner  
Lean Six Sigma Green  
Belt Certified

### Professional Affiliations

City of Westbrook, ME  
Recreation and  
Conservation  
Commission –  
Associate Member,  
2021 – 2023

City of Westbrook, ME  
Sewer Commission –  
Member, 2021 – 2023

**Kevin Price** leads BerryDunn's Community Development and Utility Operations Practice, assisting local government clients with business process improvement, fee analysis, system selection, and implementation projects. A certified Project Management Professional® (PMP®), he has extensive experience in assessing the business needs and processes of municipal clients for permitting, inspections, planning, code enforcement, and land management functions. Kevin is also a Lean Six Sigma Green Belt, allowing him to continuously define, measure, analyze, improve, and control projects and environments for his clients.

### Project Experience

**Local Rapid Recovery Plan Program**, Massachusetts Department of Housing and Community Development – Principal and Engagement Manager

**Business Process Review Services**, Travis County Transportation and Natural Resources, Texas — Principal and Engagement Manager

**Business Process Mapping and Improvement of Right of Way Coordination and Management**, City of Boston Public Works Department – Engagement Manager

**Permitting Process Review**, Town of Wells, Maine – Project Manager

**Needs Analysis and Financial System Selection Assistance**, Waste Commission of Scott County, Iowa – Engagement Manager

**Permit Tracking Replacement System**, City of Philadelphia Water Department, Pennsylvania – Engagement Manager

**Municipal Street Addressing Process Review**, City of Philadelphia, Pennsylvania – Project Manager

**Electronic Plan Review Audit, Selection Assistance, and Implementation Oversight**, City of Frisco, Texas – Engagement Manager

**Permit Software Needs Assessment and Procurement Consulting Services**, City of Irvine Community Development Department, California – Engagement Manager

### Key Focus Areas

**Process Analysis and Improvement:** Kevin has assisted BerryDunn clients with process improvement projects as part of system replacement projects and as standalone projects. Kevin has previously led the process improvement projects with the Cities of Rockville, Maryland; Alexandria, Virginia; Philadelphia, Pennsylvania; and Frisco, Texas. He also led the mapping of Community Development and Utility Operations processes for the City of Richland, Washington.

**Project Management:** Kevin has managed system selection and IT strategic planning projects for some of BerryDunn's most complex local government clients. He previously managed BerryDunn's Municipal Street Addressing and Right-of-Way Permitting and Code Violation System Assessment Projects for the City of Philadelphia.



**Fred Turnier,**  
**AICP, MPA, Prosci**  
**CCP®**

*Project Manager*

### **Education and Certifications**

Master's in Public  
Administration (MPA),  
University of Nevada,  
Las Vegas

BA, Economics and  
Geography, University  
of Nevada, Reno

Certified Planner,  
American Institute of  
Certified Planners  
(AICP)

Prosci® Certified  
Change Practitioner

### **Professional Affiliations**

American Planning  
Association (APA)

**Fred Turnier** has more than 25 years of experience working with local government agencies and extensive experience assisting public-sector entities with project management and development services, business process improvement, fee and cost-recovery analysis, system design and implementation, and policy analysis and formation. He focuses in the areas of community development, planning, building, inspections, code enforcement, business licensing, housing and homeless issues, land management, water quality planning, utilities, and infrastructure planning. Fred also has experience serving in the public sector as a community development director for the Cities of Reno and Fernley, Nevada, and principal planner in Clark County, Nevada.

### **Project Experience**

**Business Process Review Services**, Travis County Transportation and Natural Resources, Texas — Project Manager

**Business Process Review Services**, Pitkin County Community Development Department, Colorado – Project Manager

**Permit Software Needs Assessment and Procurement Consulting Services**, City of Irvine Community Development Department, California – Project Manager

**Permitting and Inspections Operational Study**, Village of Schaumburg, Illinois – Project Manager

**Electronic Plan Review Audit, Selection Assistance, and Implementation Oversight**, City of Frisco, Texas – Business Analyst

**Vision 2024 Development**, City of Tucson Planning and Development Department, AZ – Project Manager

**Permit Fee Study**, City of Largo, FL – Business Analyst and SME

### **Key Focus Areas**

**Community Development:** Fred's extensive background in local government community development leadership positions affords him knowledge of technology, best practices, and common challenges in the field. He has served as community development or planning director for multiple cities, including several in Nevada. His background includes technical and management oversight of planning, building, code enforcement, business licensing, code enforcement, inspections, and environmental planning.

**Business Process Improvement:** Fred has extensive experience providing business process improvement services across many departments, including public works and parks and recreation. Many projects involve identifying business processes that overlap departments, services, classifications/compensations for staff, and performance metrics. Additionally, Fred has helped to identify efficiencies and best management practices, including written workflow assessments, performance metrics identification, and long- and short-term improvement recommendations development. Fred also contributed data-gathered toward cost of service fee studies and strategic planning implementation reporting.



**Jesse Myott, MA**  
*Financial  
Management SME*

### **Education and Certifications**

AS, Champlain  
College

BA, History, University  
of Rhode Island

MA, History, San  
Francisco State  
University

### **Professional Affiliations**

California Society of  
Municipal Finance  
Officers (CSMFO)

Municipal  
Management  
Association of  
Northern California  
(MMANC)

**Jesse Myott** brings nearly a decade of public sector experience, focusing on supporting municipalities with operating and capital improvement budget development and management; special fund accounting, revenue and expenditure forecasting; customer valuation; and cost of revenue analyses for municipal programs and services.

### **Project Experience**

**Permit Fee Study**, City of Largo, Florida – Project Manager

**Business Process Review Services**, Travis County Transportation and Natural Resources, Texas — Project Manager

**Local Rapid Response Planning**, Massachusetts Department of Housing and Community Development – Subject Matter Expert

**Citywide Fee Study**, City of Villa Park, CA – Project Manager

**Development Services Business Process Improvement Consulting Services**, City of Chelsea, Massachusetts – Business Analyst

**Building and Development Fee Study**, Manatee County, Florida – Project Manager

**Needs Analysis and Financial System Selection Assistance**, Waste Commission of Scott County, Iowa – Engagement Manager

**Needs Analysis and Financial System Selection Assistance**, Waste Commission of Scott County, Iowa – Business Analyst

**Building Fee Study**, City of Gainesville, FL — Project Manager

### **Key Focus Areas**

**Process Analysis:** Jesse is an experienced municipal finance and management professional with nearly a decade of experience serving in many areas of local government both as an analyst and in management roles. His municipal business process knowledge extends through city administration, public works, water delivery and waste collection services, solid waste collection, public safety, economic development and redevelopment, library and recreation services, human resources, capital improvement program development, facility planning, compensation and benefits analysis, and city-wide operating budget planning, monitoring and delivery.

**Fee Studies:** Jesse has authored highly complex and sensitive fee studies, created detailed subsidy analyses, developed cost recovery models, and water and sewer rate setting models for a number of municipalities in the San Francisco Bay Area, California and Boston, Massachusetts area.



**Keri Ouellette,**  
**AICP, MCRP**  
*Planning and  
Development SME*

### **Education**

Masters of City and  
Regional Planning  
(MCRP), Georgia  
Institute of Technology

BA, Urban Studies  
and Architectural  
Studies, Connecticut  
College

American Institute of  
Certified Planners  
(AICP)

### **Professional Affiliations**

APA Northern New  
England Chapter

American Planning  
Association (APA)

**Keri Ouellette** has spent the last 15 years of her career in local government permitting, inspections, and land development departments. From smaller cities (Portland, Maine) to large city agencies (New York City), Keri brings deep knowledge of policy development and the complex issues municipalities face in addressing growth and managing enforcement. She augments this knowledge with strong technical literacy in the technology that supports permitting and planning, as Keri pioneered system modernizations in her positions with multiple municipalities.

### **Project Experience**

**Comprehensive Plan Development**, City of Bangor, Maine – Project Manager

**Local Rapid Recovery Plan Program**, Massachusetts Department of Housing and Community Development – Lead Planner

**Development Services Business Process Improvement Consulting Services**, City of Chelsea, Massachusetts – Business Analyst

**Business Process Review Services**, Travis County Transportation and Natural Resources, Texas — Business Analyst

**Permitting System Implementation Assistance**, City of Wilmington, North Carolina – Business Analyst

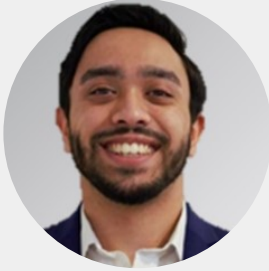
### **Other Relevant Experience**

**City of Portland, Maine:** As the permitting manager for the City of Portland, Maine, Keri oversaw the entire permitting process from intake through inspection completion for all construction permits. During her tenure, Keri managed the implementation of a modern online permitting and records management system. She was integral in the technical pieces such as system customization and conducting quality assurance testing while leading the business processes to support the systems, like training staff and establishing workflows.

### **Key Focus Areas**

**City Planning:** Keri evaluated development applications and zoning and environmental reviews for the Planning, Zoning, and Architectural Review Boards for the Town of Eastchester, New York. She modernized the technology environment by implementing the use of GIS to prepare maps for planning analysis. Her work also involved community-based research around policy issues and she drafted local laws related to zoning, housing, urban design, and environmental management.

**Program Coordination and Management:** Keri held the positions of program coordinator and senior program manager for the New York City Department of Housing Preservation and Development (HPD), Division of Building and Land Development Services. She was responsible for coordinating and planning services related to HPD's loan programs for both new construction and preservation of affordable housing.



**Sachin Goradia**  
*Business Analyst*

### **Education and Certifications**

BA, Political Science  
and Economics,  
Rutgers University  
Eagleton Institute of  
Politics Undergraduate  
Associate

**Sachin Goradia** is a consultant in our Local Government Practice Group who has a strong background in advocacy, coordination, and strategic marketing and communication. Having worked in the public sector, Sachin is well-versed in many aspects of government operations, including policy and strategy formation, business process optimization, and research and trend analysis.

### **Project Experience**

**ERP Modernization Project**, Chesterfield County, Virginia – Business Analyst

**Environmental Public Health Business Analyst and Project Manager**, Clark County, Washington – Business Analyst

**Financial System Selection**, Dona Ana County, New Mexico – Business Analyst

**ERP Implementation Project Management**, Louisville/Jefferson County Metro Government, Kentucky – Business Analyst

**ERP Consulting Services**, Henrico County, VA – Business Analyst

### **Key Focus Areas**

**Research and Analysis:** Sachin has developed a knowledge base in various federal policies and systems through research and analysis. For instance, he researched economic resources for small businesses and non-profit organizations to use to rebuild their services during the COVID-induced pandemic that culminated in a timeline of the U.S. federal response to COVID-19. He also analyzed recommendations for the Innovation ENJINE Challenge to strengthen the New Jersey government during his time in the Department of the Treasury.

**Strategy Development:** Through his work with the Rutgers Consulting Group, Sachin provided marketing strategies and services to Sookchak, an Indian education startup, with a specific emphasis on branding, values, strategies, and best practices. As a result of his work, Sachin helped develop strong relationships with both businesses and clients. As part of his efforts, Sachin presented information related to optimization, analytics, social media marketing, and data presentation to create effective marketing strategies.

## Section IX – Contract Terms

BerryDunn affirms that it accepts the County's standard contract terms.

On the following pages, we have also included signed copies of the following:

1. Living Wage Solicitation Form
2. Addendum 1 acknowledgement





**COUNTY OF SONOMA**

**GENERAL SERVICES PURCHASING DIVISION**

2300 COUNTY CENTER DRIVE, SUITE A208  
SANTA ROSA, CALIFORNIA 95403  
(707) 565-2433 Fax: (707) 565-6107

**Living Wage Solicitation Form**

1. Within the last five (5) years, have you had any violations that were sustained with the National Labor Relations Board, Occupational Safety and Health Agency, California Labor Commission, Equal Employment Opportunity Commission, Environmental Protection Agency, and/or the Department of Fair Employment and Housing?

☐ Yes(Attach a statement describing the findings of violations and how they were addressed.)

☐ No

2. A five percent (5%) weighting preference shall be provided to any service contractor who certifies that at least fifty percent (50%) of the workforce that will be used to perform the service contract will be Sonoma County residents. Said weighting preference shall be applied in accordance with the procedures set forth in the County's Local Preference Policy for Services. *This preference is not applicable if federal funding will be used to pay for these services.*

The undersigned complies with the statement above.

☐ Yes

☐ No

The Undersigned acknowledges that they will be required to complete an additional, detailed self-certification form if awarded a contract as a result of this solicitation. By completing and signing this form, the undersigned states that, under penalty of perjury, the statements provided herein are true and correct.

Authorized Signature: \_\_\_\_\_

Date: March 21, 2022

Printed Name and Title: Kevin Price, Principal

Organization Name: Berry Dunn McNeil & Parker, LLC

The Living Wage Ordinance can be found at: <http://sonomacounty.ca.gov/CAO/Living-Wage-Ordinance/>

Revision Date: 7-19-19





## COUNTY OF SONOMA

### **ADDENDUM NO. 1**

**RFP** SC001-1451, Management Review Services  
**SUBJECT:** Supplemental Information / Responses to Proposer Questions  
**DATE:** 03/07/22

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This addendum provides information that is supplemental to, clarifies, or modifies the above-referenced solicitation. Note that similar questions have been either grouped together or addressed with a single response.

**Q1: Does the County have a budget for this project? If yes, can the amount be shared?**

The County encourages bidders to submit proposals that achieve the desired outcomes using the bidders' typical rates for such services, without the constraint or influence of a specified budget. The County would like to receive the fullest range and breadth of proposals as possible.

**Q2: Does the County have an on-site preference for specific tasks? If yes, which tasks?  
Could the requested services be performed completely remotely?**

The County expects proposers to use their experience and discretion to suggest which tasks will successfully be accomplished in person or remotely, in order to achieve the scope described in the RFP by the targeted completion date of August 29<sup>th</sup>, 2022. Any travel-related expenses must be itemized in the proposal, as per Section IV of the RFP.

**Q3: What are the primary software applications used to support Permit Sonoma, besides Accela?**

Digital Health Department (DHD from Tyler Technologies) and Qless

**Q4a: Does the County desire inclusion of customers or external stakeholders as part of this project?**

Yes

**Q4b: Would the gap analysis described in section A.2 (page 4) use the results from the 2019 focus groups, or is the consultant expected to survey customers?**

The County expects that the winning proposer will use their experience to propose an approach that is comprehensive and achievable within the proposed timeframe; external customer feedback is expected to be part of this analysis. The focus group summary can be shared with the winning proposer.

**Q5a: Will the County make other completed department reviews available?**

**Q5b: Has a management review of Permit Sonoma been conducted in the past? If so, who conducted it, what were the fees and hours incurred, and can a copy of the report be provided?**

No. The scope of work for Permit Sonoma is unique and the County does not have a previous review available for Permit Sonoma.

**Q6a: Has the County identified the metrics or organizations for the benchmarking analysis?**

**Q6b: Has the County already identified a source with benchmark data, or is the consultant expected to develop the benchmarks?**

**Q6c: Has the County already identified jurisdictions with public permit data or available benchmarks, or is the consultant expected to identify jurisdictions with public permit data?**

**Q6d: Is the consultant to identify the existing service levels and metrics or develop service levels and metrics?**

**Q6e: What information and data are available to analyze customer service, especially quality and consistency?**

**Q6f: How many jurisdictions would the County like the proposers to review as part of the requested benchmark analysis? Does the County have a list of peers it typically assesses**

The County expects that the winning proposer will use their experience and knowledge, in conjunction with discussion with the County, to identify industry or comparable jurisdictional best practices and metrics. Comparable jurisdictions to Sonoma often include but are not limited to Monterey, Marin, Napa, San Mateo, and Santa Cruz counties. The proposer may suggest a list of jurisdictions, which may be further refined or discussed with the County.

**Q7: What was the scope of activities associate with the 2019 focus group work? Is the focus group report available for review prior to submittal?**

The focus groups were a starting point to understand building professionals' perceptions of Permit Sonoma. The report can be shared with the winning proposer. High level findings are summarized in the RFP document.

**Q8: What were the recommendations or implementation plan that came from the work in 2019? What feedback or response was provided to stakeholders who participated in the focus groups?**

Stakeholders expressed a desire for more consistency in information and processes generally, and a higher level of customer service orientation. Due to the pandemic, the management review was delayed, which was the next step after the focus groups.

**Q9: Who is represented on the CAO project team?**

Yvonne Shu, administrative analyst in the Policy, Grants and Special Projects division, is the project manager.

**Q10a: When was the most recent assessment of costs, allocation of costs, and fees for Permit Sonoma or its divisions? Is that report available?**

**Q10b: Has the County ever completed a formal cost-of-service or fee study? If so, when was the last study completed?**

The County has a user fee and cost recovery study from November 2021 that can be made available to the winning proposer. The study addresses some, but likely not all aspects of these questions.

**Q11: In addition to Permit Sonoma's mission, are there departmental goals and objectives that guide the divisions in fulfilling the mission?**

Permit Sonoma's website includes a page dedicated to Operational Process Improvements, which are applicable to all of its divisions and which help the department achieve and improve upon its overall mission: <https://sonomacounty.ca.gov/PRMD/Performance-Data/Process-Improvements/>

**Q12: How many full-time equivalents does Permit Sonoma have in each of its divisions?**

**The position allocation categories are not a 1:1 match with the divisions, but the full-time allocations (not all positions are filled) for each are as follows:**

- Administration (including accounting): 17.0
  - Building: 23.0
  - Code Enforcement: 13.0
  - Comprehensive Planning: 6.0
  - Customer Service: 9.0
  - Information Systems: 9.0
  - Engineering: 12.5
  - Environmental Review: 9.0
  - Fire Prevention (including chipper): 7.5
  - Hazardous Materials: 6.0
  - Planning Administration: 3.0
  - Planning Review: 22.0
  - Surveying: 3.0
  - Well and Septic: 14.0
- Total full-time allocations: 154.0

**Q13: Does Permit Sonoma have documented policies and procedures for all six of its divisions?**

Permit Sonoma's Guidelines and Documents can be found here:

<https://sonomacounty.ca.gov/PRMD/Permit-Guidelines-and-Documents/>

**Q14: Why is it necessary for the project team to have well and septic permitting expertise?**

The well and septic division has unique challenges and perceptions, and any recommendations for that division would have more credibility coming from someone with that specific expertise and experience.

**Q15: The County has a target completion date of the draft report as August 29, 2022. The County is requesting a great deal of services to be performed and a report to be drafted in four months. Would the County be open to a later target completion date?**

It is a *target* completion date and the County is open to discussion of a proposed timeline that will achieve the proposed scope within an achievable timeline.

**Q16: The desired goals and outcomes in section A.2 would require a significant amount of work. Would the County be open to the consultant only proposing on the gap analysis and benchmark analysis, or must the consultant propose on all the desired goals/outcomes in A.2?**

The County has issued this RFP because it recognizes the complexity of the project. The County expects that the winning proposer will provide a suggested approach for the entire project scope.

**Q17: Would the County consent to proposers using the County's logo in their proposal document? If so, please provide a high-resolution jpeg image.**

The County's logo on the proposal document is not necessary.

**Q18: Could the County confirm whether it would consider any requests for alteration or exceptions to the terms in Attachment A in submitted proposals, including the insurance requirements?**

Exceptions to the contract terms must be identified as part of the proposal; a willingness to accept the County's contract terms is part of the evaluation criteria but is not the sole criteria.

The insurance requirements are standard and generally are not altered, but please cite any exceptions as needed. Exceptions to either the contract terms or insurance requirements may be considered on a case-by-case basis.

All other terms and conditions of RFP No. SC001-1451 remain unchanged.

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Please sign below as acknowledgment of receipt of Addendum No. 1 and include with your submittal.

Signature



Printed Name

Kevin Price

Date

March 21, 2022

Company

Berry Dunn McNeil & Parker, LLC