

**PROFESSIONAL SERVICES AGREEMENT BETWEEN THE**  
**THE CITY OF NORMAN**  
**AND**  
**MANAGEMENT PARTNERS, INC.**

This Consulting Agreement ("Agreement") is entered into this \_\_\_\_\_ day of January, 2019 (hereinafter referred to as the effective date of the agreement) by and between the City of Norman Oklahoma, (the "Client") and Management Partners, Inc., 1730 Madison Road, Cincinnati, Ohio 45206 ("MANAGEMENT PARTNERS").

**Witnesseth**

WHEREAS, MANAGEMENT PARTNERS has substantial skill and experience in analysis of services related to city development and inspection practices, and

WHEREAS, The Client desires to hire MANAGEMENT PARTNERS and MANAGEMENT PARTNERS desires to provide services to the Client, NOW, THEREFORE, for good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the Parties agree to the terms and conditions set forth herein.

**Article 1. Statement of Work**

MANAGEMENT PARTNERS shall perform management consulting services (hereinafter referred to as the "services") in a satisfactory and proper manner in accordance with direction provided by the City Manager, or his designee. The services provided will be those described in Attachment A, the MANAGEMENT PARTNERS proposal to City dated December 7, 2018.

Additionally, MANAGEMENT PARTNERS agrees that its Project Management Structure shall ensure any public presentations made related to the analysis will be led by Gerald E. Newfarmer.

**Article 2. Time for Completion**

Services of MANAGEMENT PARTNERS shall begin upon approval of both parties and shall be completed in 180 days, unless an extension of time is agreed upon by both parties. Further renewals of this Agreement are at the option of the Parties and shall be in agreed upon in writing.

**Article 3. Compensation**

MANAGEMENT PARTNERS will invoice City monthly based on the completion of specific activities (milestones) which includes all expenses. Upon receipt of monthly invoice, the Client will remit payment of the same amount to MANAGEMENT PARTNERS within 30 days. The total amount of payment in accordance with this agreement shall not exceed \$97,600. Any expansion of the scope of work by the Client shall involve the discussion of additional fees by both parties.

#### **Article 4. Additional Services**

At the City's request, MANAGEMENT PARTNERS may submit proposals for additional professional services. Each proposal submitted shall detail: (1) scope of work for the additional services, (2) period of services to be performed, and (3) method and amount of compensation. The Client shall provide written acceptance and authorization to MANAGEMENT PARTNERS prior to the commencement of work on any proposed additional services. Each proposal for additional services accepted and approved by the Client shall become part of this Agreement and shall be governed by the terms and conditions contained herein.

#### **Article 5. Place of Performance**

MANAGEMENT PARTNERS shall be responsible for maintaining its own office facilities and will not be provided with either office facilities or support by the Client.

#### **Article 6. Discrimination Prohibited**

In performing the services required hereunder, MANAGEMENT PARTNERS shall not discriminate against any person on the basis of race, color, religion, sex, national origin or ancestry, sexual orientation, age, physical handicap, or disability as defined in the American With Disabilities Act of 1990, as now enacted or hereafter amended.

#### **Article 7. Reports and Information**

At such times and in such forms as City may require, there shall be furnished to City such statements, records, reports, data and information, as City may request pertaining to matters covered by this Agreement. Unless authorized by City, MANAGEMENT PARTNERS will not release any information concerning the project, including any reports or other documents prepared pursuant to this Agreement.

#### **Article 8. Establishment and Maintenance of Records**

MANAGEMENT PARTNERS shall maintain records in accordance with applicable law and requirements prescribed by City with respect to all matters covered by this Agreement. Except as otherwise authorized by City, such records shall be maintained for a period of three (3) years after receipt of final payment under this Agreement.

#### **Article 9. Assignability**

MANAGEMENT PARTNERS shall not assign any interest in this Agreement and shall not transfer any interest in this Agreement (whether by assignment or novation), without the prior written consent of City thereto.

#### **Article 10. Termination for Convenience of City**

City may terminate this Agreement at any time by giving at least fifteen (15) days' notice in writing to MANAGEMENT PARTNERS. If MANAGEMENT PARTNERS is terminated by City as provided

herein, MANAGEMENT PARTNERS will be paid for the services actually performed to the time of termination.

#### **Article 11. Construction and Severability**

If any part of this Agreement is held to be invalid or unenforceable, such holding will not affect the validity or enforceability of any other part of this Agreement so long as the remainder of the Agreement is reasonably capable of completion.

#### **Article 12. Entire Agreement**

This Agreement contains the entire agreement of the parties and supersedes any and all other agreements or understandings, oral or written, whether previous to the execution hereof or contemporaneous herewith.

#### **Article 13. Applicable Law**

This Agreement shall be governed by and construed and enforced in accordance with the laws of the State of Oklahoma, and the laws, rules and regulations of the City of Norman.

#### **Article 14. Indemnification**

MANAGEMENT PARTNERS hereby agrees to indemnify the Client and to hold the Client harmless against any and all claims, action, or demands against the Client and against any and all damages for injury to or death of any person and for loss of or damage to any and all property arising out of the negligent acts, errors or omissions of MANAGEMENT PARTNERS under this Agreement. MANAGEMENT PARTNERS shall not be held responsible for any claims caused by the negligence of the Client.

#### **Article 15. Insurance**

MANAGEMENT PARTNERS shall maintain the types and levels of insurance during the life of this Agreement as specified below. The Client will be named as additional insured on MANAGEMENT PARTNERS's Certificates of Insurance and the MANAGEMENT PARTNERS will provide the Client with these Certificates of Insurance:

- Commercial general liability insurance - \$1,000,000 for each occurrence and \$2,000,000 in the aggregate
- Comprehensive automobile liability insurance - \$1,000,000 combined single limit each occurrence Workers Compensation insurance – Statutory limits
- Professional liability insurance - \$2,000,000 in the aggregate
- Excess or Umbrella Liability - \$3,000,000 in the aggregate

#### **Article 16. Confidential Information**

MANAGEMENT PARTNERS acknowledges and agrees that in the course of the performance of the services pursuant to this Agreement, MANAGEMENT PARTNERS may be given access to, or

come into possession of, confidential information from the Client, of which information may contain privileged material or other confidential information.

MANAGEMENT PARTNERS acknowledges and agrees, except if required by judicial or administrative order, trial, or other governmental proceeding pertaining to this matter that it will not use, duplicate, or divulge to others any such information belonging to or disclosed to MANAGEMENT PARTNERS by the Client without first obtaining written permission from the Client. "Confidential information" as used herein, includes information, materials, products, and deliverables developed during, and discoveries and contributions made by MANAGEMENT PARTNERS in the performance of this Agreement. All tangible embodiments of such information shall be delivered to the Client by MANAGEMENT PARTNERS upon termination hereof, or upon request by the Client, whichever occurs first. The Client acknowledges MANAGEMENT PARTNERS has the right to maintain its own set of work papers which may contain confidential information.

#### **Article 17. Independent Contractor Status**

It is understood and agreed that MANAGEMENT PARTNERS will provide the services under this Agreement on a professional basis as an independent contractor and that during the performance of the services under this Agreement, MANAGEMENT PARTNERS's employees will not be considered employees of the Client within the meaning or the applications of any federal, state, or local laws or regulations including, but not limited to, laws or regulations covering unemployment insurance, old age benefits, worker's compensation, industrial accident, labor, or taxes of any kind. MANAGEMENT PARTNERS's employees shall not be entitled to benefits that may be afforded from time to time to Client employees, including without limitation, vacation, holidays, sick leave, worker's compensation, and unemployment insurance. Further, the Client shall not be responsible for withholding or paying any taxes or social security on behalf of MANAGEMENT PARTNERS's employees. MANAGEMENT PARTNERS shall be fully responsible for any such withholding or paying of taxes or social security.

#### **Article 18. Reliance on Data**

In performance of the services, it is understood that the Client and/or others may supply MANAGEMENT PARTNERS with certain information and/or data, and that MANAGEMENT PARTNERS will rely on such information. It is agreed that the accuracy of such information is not within MANAGEMENT PARTNERS's control and MANAGEMENT PARTNERS shall not be liable for its accuracy, nor for its verification, except to the extent that such verification is expressly a part of MANAGEMENT PARTNERS's scope of services.

#### **Article 19. No Consequential Damages**

To the fullest extent permitted by law, neither party shall be liable to the other for any special, indirect, consequential, punitive or exemplary damages resulting from the performance or non-performance of this Agreement notwithstanding the fault, tort (including negligence), strict liability or other basis of legal liability of the party so released or whose liability is so limited and shall extend to the officers, directors, employees, licensors, agents, subcontractors, vendors and related entities of such party.

## **Article 20. Reuse of Documents**

All documents including drawings, calculations, work sheets, survey notes and specifications prepared by MANAGEMENT PARTNERS pursuant to this Agreement are the property of Client and shall be delivered to Client at the completion or termination of the Study. Any reuse without specific written verification or adaptation by MANAGEMENT PARTNERS will be at Client's sole risk and without liability or legal exposure to MANAGEMENT PARTNERS, and Client shall indemnify and hold harmless MANAGEMENT PARTNERS from all claims, damages, losses and expenses including attorney's fees arising out of or resulting there from.

## **Article 21. Notices**

All notices required or permitted under this Agreement shall be in writing and shall be deemed deliverable when delivered in person or deposited in the United States mail, postage prepaid, addressed as follows:

**If for the Client:**

Mary Rupp  
Interim City Manager

City of Norman  
201 West Gray  
Norman, Oklahoma 73069

**If for Management Partners, Inc.:**

Gerald E. Newfarmer  
President and CEO

Management Partners, Inc.  
1730 Madison Road  
Cincinnati, Ohio 45206

## **Article 22. Compliance with Applicable Laws**

MANAGEMENT PARTNERS agrees not to discriminate in its employment practices, and will render services under this Agreement without regard to race, color, religion, sex, national origin, veteran status, political affiliation or disabilities.

Any act of discrimination committed by MANAGEMENT PARTNERS, or failure to comply with these statutory obligations when applicable, shall be grounds for termination of this Agreement.

## **Article 23. General Provisions**

- A. Entire Agreement: This Agreement represents the entire and sole agreement between the Parties with respect to the subject matter hereof.

- B. Waiver: The failure of either Party to require performance by the other of any provision hereof shall in no way affect the right to require performance at any time thereafter, nor shall the waiver of a breach of any provision hereof be taken to be a waiver of any succeeding breach of such provision or as a waiver of the provision itself. All remedies afforded in this Agreement shall be taken and construed as cumulative; that is, in addition to every other remedy available at law or in equity.
- C. Relationship: Nothing herein contained shall be construed to imply a joint venture, partnership, or principal-agent relationship between MANAGEMENT PARTNERS and the Client; and neither Party shall have the right, power, or authority to obligate or bind the other in any manner whatsoever, except as otherwise agreed to in writing.
- D. Assignment  
Delegation: Neither Party shall assign or delegate this Agreement or any rights, duties, or obligations hereunder without the express written consent of the other. Subject to the foregoing, this Agreement shall inure to the benefit of and be binding upon the successors, legal representatives, and assignees of the Parties hereto.
- E. Severability: If any provision of this Agreement is declared invalid or unenforceable, such provision shall be deemed modified to the extent necessary and possible to render it valid and enforceable. In any event, the unenforceability or invalidity of any provision shall not affect any other provision of this Agreement, and this Agreement shall continue in force and effect, and be construed and enforced, as if such provision had not been included, or had been modified as above provided, as the case may be.
- F. Governing  
Law: This Agreement shall be governed by, and construed in accordance with, the laws of the State of Oklahoma.
- G. Paragraph  
Headings: The paragraph headings set forth in this Agreement are for the convenience of the Parties, and in no way define, limit, or describe the scope or intent of this Agreement and are to be given no legal effect.
- H. Third  
Party Rights: Nothing in this Agreement shall be construed to create or confer any rights or interest to any third party or third party beneficiary. It is the intent of the parties that no other outside, non-party claimant shall have any legal right to enforce the terms this agreement.

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IN WITNESS WHEREOF, the Parties have executed this Agreement by their duly



authorized representatives.

**The City of Norman**

Approved as to form and legality this \_\_\_\_\_ day of \_\_\_\_\_, 2019.

\_\_\_\_\_  
General Counsel

**City of Norman, Oklahoma**

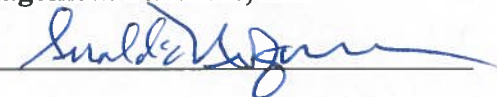
By: \_\_\_\_\_  
Signature

Mayor, City of Norman, Oklahoma  
Title

\_\_\_\_\_  
Date

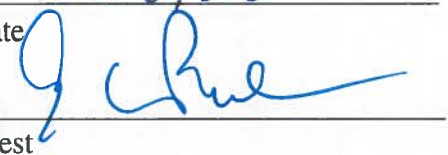
\_\_\_\_\_  
Attest: Brenda Hall, City Clerk

**Management Partners, Inc.**

By: 

President & CEO  
Title

Jan 16, 2016  
Date

  
Attest

This is to certify that an appropriation in the amount of this contract is available therefore and that

\_\_\_\_\_ has been authorized to execute the contract and approve  
all requisitions and change orders.

By \_\_\_\_\_

\_\_\_\_\_  
Title

Seal



**MANAGEMENT PARTNERS proposal to City dated December 7, 2018**

December 7, 2018

Ms. Mary Rupp  
Interim City Manager  
City of Norman  
201 West Gray Street  
Norman, OK 73069

Dear Ms. Rupp:

Management Partners is pleased to have been selected to help the City of Norman to improve its development review process. As we discussed with Terry Floyd and his team, this proposal describes our recommended plan of work for the engagement and serves as the basis of our conversation about the content of a professional services contract.

As you know, the development review process is a highly visible and complex function of a local government. The significant resources the private sector devotes to developing property requires sensitivity to the timing and quality of the City's review work for both residential and commercial developments. Finding a balance between the public policy and legal requirements of such review work, and the need for frequent users of the development review process to feel they are well-served by it, is the challenge faced by cities across the country.

The plan of work below begins with individual interviews to develop an understanding of roles, internal and external process participants, and handoffs. We will also interview a representative group of frequent private sector customers/stakeholders to understand their experiences with the development review process including intake, plans review, permit issuance, inspections and other areas that may be of concern. We will examine current policies and procedures to understand how the system works and conduct benchmarking to compare Norman's performance information with that of comparable jurisdictions.

The observations and data collected in the analytical stage will lead to concrete steps for making Norman's development review process more efficient and effective. We use a facilitated technique called the GE Work-Out™ which was originally designed by the General Electric Company to determine the best way to realize and implement goals. This technique engages managers and front-line staff members who do the daily work for the development review process in identifying the actual changes to be implemented. Once management approves those changes, we support implementation with detailed action planning. By putting equal emphasis on the importance of engaging working level staff in deciding on changes to be implemented and by supporting responsible managers during implementation, we know that real improvements will happen as a result of the engagement.

#### **Plan of Work**

##### ***Activity 1 – Start Project***

Management Partners will begin this project by meeting with you and key staff to review and finalize the details of our plan of work. In this way the workplan and schedule can be precisely tailored, applying sensitivity to the needs and circumstances of City staff.

The project startup activity forms the foundation of our relationship with the City and provides a setting for the Norman project liaison and Management Partners' team members to meet and discuss relevant background information about the project and key participants. We will confirm the project activities, staff

and stakeholder interview schedule and locations, project deliverables and due dates to ensure the project is completed on time and on budget.

During this activity we will also identify the management team to drive this project, setting goals, determining implementation decisions, and establish the basis for identifying a team of front-line workers to serve as members of the GE Work-Out™ Team that will develop specific implementation recommendations for management.

We understand that the work associated with this project is in addition to the normal work of the City organization in general and staff from the Department of Planning and Community Development in particular. Our goal is to integrate our work activities in a manner that is thoughtful, thereby minimizing disruption to the divisions that are the focus of this effort.

### ***Activity 2 – Analyze Current Operations***

Management Partners will review and analyze the City's existing operations, including relevant policies, processes, and performance data. We will learn about development operations through interviews with key managers and staff members, in addition to our review of background information. These interviews will help us understand their various roles in the development review process and obtain feedback about strengths, weaknesses, and opportunities for improvement, as well as about perceived constraints on organizational effectiveness.

The information obtained from department managers and key process staff will be complemented by interviews with applicants and stakeholders in Activity 4. Doing so will round out our preliminary understanding of information and communication important to the submission of complete applications and timely reviews.

We will supplement information gathered during staff interviews by reviewing workflow and workload data as available to identify redundancies, process flow bottlenecks, inefficiencies in communication and the use of staff, technology, and other resources key to completing the review. Additionally, we will supplement our analysis with applicable industry best practices based on our expertise and knowledge as a national firm.

### ***Activity 3 – Create Process Maps***

Next, we will review and update and/or create process maps for up to four specific processes within the overall development process. A process map is a diagram that shows each step in a business process. Process maps are useful in ensuring each step in the process is documented, and also in identifying potential process changes for greater efficiency and improved customer service.

We will collaborate with City staff to determine which business processes to map. Examples are permits for single family homes and permits for a tenant improvement. We will convene staff that have knowledge of the detailed processes to understand work flow and create the maps. Once we have drafts prepared, we will meet with City staff to review them to ensure the steps we have identified are accurate.

### ***Activity 4 – Obtain Feedback from Users***

To understand the effectiveness of any service operation, it is important to understand the experiences of those who use the service. An important step to understanding the perspective of those who engage the City's development review process is to ask about their experiences.

We will conduct confidential individual interviews with a representative sample of developers, architects, engineers, and contractors who are knowledgeable users of the City processes, selected in consultation with staff, to ascertain their perspectives about perceived strengths, weaknesses and opportunities for

improvement. We will inquire about their experiences with cycle times, process complexity and transparency, and any other issues and insights relevant to the analysis. Since there are differences in perspective among users and various types of interactions within the City, care will be taken to reflect this diversity in the group of process users asked to participate in interviews.

Management Partners' team members are skilled at conducting confidential interviews and in sifting the resulting input to inform the overall process of learning. To preserve participant confidentiality Management Partners will work closely with the City's project liaison. Upon completion of the interviews we will prepare a summary of the common themes. This summary will be reviewed with the project management team.

#### ***Activity 5 – Gather Comparative Performance Information***

Comparing Norman's performance information with other service providers (benchmarking), is a useful complementary learning process. Successful benchmarking relies on carefully identifying criteria that allows for "apples to apples" comparisons. Management Partners will conduct benchmarking research with peer communities identified in conjunction with the City's project manager to obtain relevant comparisons and an understand the different approaches peer jurisdictions use to deliver services.

We will obtain information to enable us to compare various aspects of development review and permitting processes and requirements, with a focus on measurable performance data as available. Once we have collected the relevant data, we will analyze the results for applicability to Norman, focusing on processes, programs, policies, performance metrics, and fees.

#### ***Activity 6 – Summarize Opportunities for Improvement***

Using the information obtained during the analytical phase of our work coupled with our knowledge of development review best practices, we will prepare a summary of observations and ideas for improvement for review by the City's management team. This work will review the feedback that we have heard from frequent users of the City process and comparative performance information, as well as our observations about the opportunities we see for improvement on matters within the control of the City. These observations, and the feedback we receive from City officials about them, will serve as a basis for Activity 7.

Following this discussion, Management Partners will prepare a Work-Out Briefing Book containing the detailed background information developed to date in the project work. The Briefing Book will be reviewed with management and goals will be established to guide the Work-Out process. It will be the primary source of information for members of the Work-Out Team for use in Activity 7.

#### ***Activity 7 – Facilitate Decision-Making Process for Improvement***

While it is effective for professionals outside a business process to examine the process and suggest improvements, true organizational change is only possible when the staff responsible for executing the work is engaged to participate in developing the actual improvements to be implemented. To that end, Management Partners will plan and lead a three-day decision-making session involving members of City staff having responsibility for the daily processing of the City's development review function using the GE Work-Out™ technique.

This technique, developed by General Electric to develop the specific steps needed to adapt and existing organization or business process to new performance expectations, has been used successfully by Management Partners with staff teams in many local jurisdictions to improve the development review process. Unlike a traditional reengineering approach that is lengthy to

complete, this process will enable the involved staff members to work through needed improvements and the changes required to put them in place, for consideration by management. Although some of the improvements identified may be long-term, there is an emphasis on immediate implementation.

City staff members will be identified to work together in a workshop setting as the Work-Out Team, with the charge to prepare actions that, once implemented, will achieve the improvement goals established by management. Management Partners will facilitate the teams' deliberations as well as a concluding session in which specific action plan recommendations are presented to management for approval. The actual decision-making dimension of this part of the process is crucial; the basis upon which reform usually founders is inaction and indecision. With a built-in emphasis on decision-making, results become the defined outcome of this activity.

At the conclusion of the Work-Out and after presentations by and dialogue with management and the Work-Out Team, the City's management team will be expected to confirm the Team's recommendations.

### ***Activity 8 – Support Implementation***

Based on the results of the Work Out, Management Partners will prepare a draft Implementation Action Plan. This document will be based on the action planning developed during the Work-Out and approved by management, but will set forth the steps required to accomplish implementation, the relative priority level (immediate, near or long term) for each recommendation and a suggested manager to be designated as responsible for implementation of the item.

The action plan is prepared as a draft for management approval. To convert it to a final Implementation Action Plan, management will need to integrate the action steps into existing actual plans of work and establish actual dates for planned completion. The action plan offers an important management tool for managing the implementation of the work. As the City proceeds with implementation, our associates will remain available for informal consultation about implementation issues.

### ***Optional Activity – Lead Post-Plan Progress Checkup***

In a perfect world, City staff could devote all their time to making the improvements contained in the Implementation Action Plan. But as people who have worked in local government for many years, we understand the many responsibilities competing for the time and attention of your staff. We also want to make sure that the hard work leads to real change. Therefore, we recommend planning a structured process six months after the action plan is finalized to assess how implementation is proceeding and whether changes to the plan are needed. This will enable us to address any of the more complex implementation issues encountered and to support the government's work in driving implementation.

### ***Project Team***

Management Partners has a highly qualified project team to complete this work. This project will be a top priority for Management Partners. Our team members will be available in to ensure successful completion of the project. Amy Paul, Corporate Vice President, will serve as project manager and will oversee the substantive work of the project. She will be supported by Steve Chase, Jacquelyn McCray, Sam Lieberman, and Kristin Youngmeyer.

**Amy Cohen Paul**, Corporate Vice President, has more than 30 years of experience in local government management, performance measurement and strategic planning. She has led organization reviews and process improvement projects in many jurisdictions. A sampling of clients she has assisted with development review improvement projects include Santa Rosa, San Leandro, Stockton and Gilroy, California; Aurora, Colorado; Howard County, the Maryland-National Capital Park and Planning Commission and the City of Rockville, Maryland; Lexington and Louisville, Kentucky; Largo and North Port, Florida; and Oklahoma City, Oklahoma. The common thread among these projects is the ability to increase efficiency without jeopardizing quality. In addition to implementing organizational improvements, identifying alternative service delivery methods, designing and implementing performance management systems, Amy also helps local governments develop strategic and business plans. She is a skilled facilitator and trainer. Amy was part of the original management team of the International City/County Management Association's Center for Performance Measurement and she helped produce ICMA's training materials on outcome measurement. She is the editor of the book *Managing for Tomorrow: Global Change and Local Futures* and is the author of many articles in professional publications, including *The Municipal Year Book*.

**Steve Chase**, Special Advisor, brings four decades of wide-ranging public service to cities, counties, regional boards and community organizations across California, most recently as director of community development in the City of Stockton. Earlier in his career Steve served as a policy advisor and field deputy to members of the Ventura County Board of Supervisors, overseeing the Board's agendas on children and family services, public works and recreation infrastructure, land use planning, and open space conservation for six years. He also worked for the City of Ventura in the roles of deputy city manager, assistant to the city manager—city environmental coordinator, recycling office manager, and as the lead negotiator of franchise services for ambulance transport and waste disposal/recycling pick-up. Steve also has experience as Santa Barbara County's Energy Czar, regulating offshore oil and gas permitting and spill prevention/safety compliance, and also serving as the County's deputy director of planning and development for the South Coast Region. In addition, he served as a secretary to planning commissions, historical building review boards, design review boards, and various city council committees on economic development, downtown revitalization, regional mall development, beach sand stabilization and restoration, the dredging of marinas, and the conservation of rivers, estuaries and open space mesas.

**Jacquelyn McCray, Ph.D.**, is a Senior Manager with extensive local government consulting experience. She is a certified urban planner and has extensive experience assisting local governments to reform and improve development review processes, organizational and workflow analyses, performance measurement, succession planning and strategic benchmarking and planning. Jacquelyn has expertise in process improvement and re-engineering of local government development review processes and procedures. She also has excellent interview and facilitation skills, and she frequently conducts employee and stakeholder focus group meetings, strategic planning sessions. Before joining Management Partners, Jacquelyn held positions as a budget analyst, project manager and land-use manager with the City of Cincinnati. She served as vice chairperson and member of the Cincinnati City Planning Commission for nine years. Jacquelyn is a member of the American Institute of Certified Planners (AICP).

**Sam Lieberman**, Senior Management Advisor, is responsible for conducting complex financial and operational analyses to support many different types of clients including organization reviews, process improvement studies, service sharing projects, and financial planning and budgeting studies.



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

**Kristin Youngmeyer**, Management Analyst, joined Management Partners after serving in the City of Hamilton, Ohio, as an ICMA City Management Fellow. In her role as a Management Fellow she completed numerous special analysis projects for the City Manager's Office, Public Works, Parks Department, Community Development Department, and Finance Department. Prior to her experience in Hamilton, Kristin helped the Children's Mental Health Bureau in Helena, Montana by researching best practices in the systems of care to create a strategic plan for the state agency to effectively implement a statewide youth advocacy network. She also served as a community health worker with the Children's Hunger Alliance, where she evaluated program engagement statistics and made suggestions to improve reconnection rates with clients. Kristin has a bachelor of arts in biology and obtained her MPA from The Ohio State University, John Glenn College of Public Affairs.

#### Hours and Fees

Management Partners anticipates devoting 476 hours of our staff time to execute the plan of work described above in Activities 1 through 8. The total cost to complete the project in these activities is \$91,500 which includes our expenses. If the optional post-plan checkup activity described above is desired, the additional cost is \$6,100.

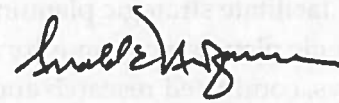
ACTIVITY	HOURS
1 – Start Project	14
2 – Analyze Current Operations	58
3 – Create Process Maps	62
4 – Obtain Feedback from Users	30
5 – Gather Comparative Performance Information	44
6 – Summarize Opportunities for Improvement	26
7 – Facilitate Decision-making Process for Improvement	200
8 – Support Implementation	40
<b>TOTAL</b>	<b>476</b>

#### Conclusion

The ultimate test of a quality project is that the client is pleased with the results and we are committed to achieving that goal. We look forward to this opportunity to be of assistance to you and your management team. Please feel free to contact me at 513-313-0503 if you have any questions about Management Partners or this proposal.

Sincerely,





Gerald E. Newfarmer  
President and CEO

c: Mr. Terry Floyd

Project Description		Estimated Cost
1 - Staffing		\$50,000
2 - Travel and Lodging		\$25,000
3 - Local Project Work		\$25,000
4 - Project Management		\$25,000
5 - Project Coordination		\$25,000
6 - Project Reporting		\$25,000
7 - Project Monitoring		\$25,000
8 - Project Evaluation		\$25,000
<b>Total</b>		<b>\$250,000</b>

#### Conclusion

The primary test of a quality project is that the client is satisfied with the results and we are committed to achieving that goal. We have provided you with the opportunity to be of assistance to you and your organization. Please feel free to contact me at 213-313-0808 if you have any questions about Management and Partners of the project.

Sincerely,

## **Martinez Public Works Succession Planning**

### **Critical Position - Interview Guide Questions**

Introduction: Management Partners was hired to assist the City of Martinez with developing a succession planning framework and supporting the Public Works department's program. Investing in an organization's human resources is critical for long-term success. This interview is confidential and the information and suggestions that are provided will be reviewed in the context of all other interviews and analysis.

**Succession Planning is defined as** "A multi-dimensional strategy to promote career growth and the development of leadership talent."

Briefly review the components of a succession planning program, i.e., critical position identification; management level training; mentoring/coaching; etc.). *The purpose of this interview is to help us develop a profile for this position.*

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#### **INTERVIEW NAME/POSITION:**

##### **General Succession Planning Questions**

1. What succession planning methods/techniques and tools have you used (or observed)?
2. What obstacles could get in the way of the City's interest succession planning?
3. What has helped you personally to advance in your career?
4. What leadership competencies are necessary for success at the City of Martinez?

##### **Position-Specific Questions**

5. Describe your key responsibilities or tasks.
6. How many hours per week do you need to spend on your most lengthy tasks? (List those tasks mentioned in question. Or, have them describe their areas of responsibility and list percentages associated.)

7. What recommendations or changes to the current configuration of job duties would you suggest, if any?

8. When thinking about the next person to assume your job, what do you think they need to be aware of? What tips or advice would you offer to someone interested in moving into your position?

9. What particular competencies (or skills) should they have? What skills can only be developed on the job?

10. Describe the technical job requirements and skills associated with your position (e.g. certifications, degrees, and special knowledge/skills).

11. With whom do you work most closely, either in your department or in other departments? Who are your primary internal and external customers or suppliers?

*Time permitting: Beyond your own position, what are your perceptions of the necessary competencies for leadership positions in the department?*

## **Martinez Public Works Succession Planning**

### **Interview Guide Questions**

***Succession Planning is defined as*** “A multi-dimensional strategy to promote career growth and the development of leadership talent.”

#### **General Succession Planning Questions**

1. What succession planning methods/techniques and tools have you used (or observed)?
2. What obstacles could get in the way of the City's interest succession planning?
3. What has helped you personally to advance in your career?
4. What leadership competencies are necessary for success at the City of Martinez?

#### **Position-Specific Questions**

5. Describe your key responsibilities or tasks.
6. How many hours per week do you need to spend on your most lengthy tasks? (List those tasks mentioned in question. Or, have them describe their areas of responsibility and list percentages associated.)
7. What recommendations or changes to the current configuration of job duties would you suggest, if any?
8. When thinking about the next person to assume your job, what do you think they need to be aware of? What tips or advice would you offer to someone interested in moving into your position?
9. What particular competencies (or skills) should they have? What skills can only be developed on the job?
10. Describe the technical job requirements and skills associated with your position (e.g. certifications, degrees, and special knowledge/skills).
11. With whom do you work most closely, either in your department or in other departments? Who are your primary internal and external customers or suppliers?

