

MEETING DATE: 10.13.14

AGENDA ITEM: Approval of a Contract Award to Matrix Consulting Group to
Conduct an Evaluation of the Development Services Process

ATTACHMENTS

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Proposal to Conduct an Evaluation of the Development Services Process

CULVER CITY, CALIFORNIA



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July 10, 2014

Ms. Shelly Wolfberg
 Assistant to the City Manager
 City of Culver City
 9770 Culver Boulevard
 Culver City, CA 90232-0507

Dear Ms. Wolfberg:

The Matrix Consulting Group is pleased to present our response to your Request for Proposals to conduct an evaluation of Culver City's Development Services process. This proposal is based on our review of the information in the invitation to submit a proposal, our background research on the City, and our extensive experience conducting development services studies in California and elsewhere in the country.

The firm and the staff that we would assign to this engagement have extensive local government management consulting experience and specialize in the evaluation of development review functions. The following paragraphs summarize the experience of our firm and proposed project team:

- We have proposed an extremely experienced project team. For this engagement, we have assigned Mr. Gary Goelitz, a Senior Vice President, as the Project Manager, and Mr. Alan Pennington, Vice President, as the Lead Analyst. These two individuals have been involved in every development review study conducted by the firm since our founding.
- Our team also includes a former Permitting Manager who led several development review reengineering projects during her local government experience.
- We have conducted over 100 organization-wide evaluations that included assessments of the development review process. The following table provides a list of recent clients served in this context, with California agencies **bolded**:

Albuquerque, New Mexico Augusta, Georgia Barstow, California Brattleboro, Vermont Deltona, Florida Franklin Township, New Jersey Fort Morgan, Colorado Goodyear, Arizona Greenbelt, Maryland	Half Moon Bay, California Johnson County, Kansas Matanuska Borough, Alaska Monroe County, Michigan Monrovia, California Montpelier, Vermont Orland Park, Illinois Orleans, Massachusetts Portsmouth, New Hampshire	Rancho Mirage, California Rancho Palos Verdes, Calif. Raymore, Missouri Roseville, California San Clemente, California San Rafael, California Spokane, Washington Sunnyvale, California Waltham, Massachusetts
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- We have also conducted over 100 dedicated specifically to the evaluation of the development review process. The following table lists illustrative projects conducted in the last 10 years, with our California projects in **bold**.

Arlington County, Virginia	Lee's Summit, Missouri
Beverly Hills, California	Los Angeles, California (current client)
Cupertino, California	Manatee County, Florida
Dayton, Ohio	Marion County, Oregon
DeKalb County, Georgia (current client)	Napa, California
Des Moines, Washington	Oceanside, California
East Palo Alto, California	Pasadena, California
Glendale, California	Salem, Oregon
Greenville, South Carolina	San Francisco, California
Gresham, Oregon	San Mateo, California
Gwinnett County, Georgia	San Jose, California
Hanover County, Virginia	Santa Monica, California
Hilton Head Island, South Carolina	Springfield, Massachusetts
Johnson City, Tennessee	Tiburon, California
Kissimmee, Florida	Sunrise, Florida (2 studies)
Lake Oswego, Oregon	West Hollywood, California
Lawrence, Kansas	West Palm Beach, Florida

We are currently working with DeKalb County (GA) and Los Angeles (CA) on development review reengineering projects that include implementation assistance.

- We stay abreast of current issues in the development review field through memberships in the American Planning Association and the International Code Council. The APA selected our study conducted for Lawrence, Kansas for inclusion in its Essential Info Packet, "Evaluating and Improving the Development Review Process," which is distributed by its Planners Advisory Service.
- We are a national consulting firm, headquartered in California.

We appreciate this opportunity to provide you with our proposal. If there are any additional items you may need or if you would like to discuss our proposal, please feel free to contact me directly at either rbrady@matrixcg.net or 650.858.0507.

Richard Brady
President



Matrix Consulting Group

1. FIRM BACKGROUND

This section of our proposal provides relevant background information regarding our firm and services provided.

1. INFORMATION ABOUT THE MATRIX CONSULTING GROUP

The Matrix Consulting Group specializes in providing analytical services to local governments, to assist them in providing highly responsive, efficient, and effective services to their residents. Our market and service focus is financial, management, staffing and operations analysis of local government. Our firm's history and composition are summarized below:

- We were founded in 2002. However, the principals and senior staff of our firm have worked together in this and other consulting organizations *as one team* for between 10 and 30 years.
- Our *only* market and service focus is management, staffing and operations analysis of local government.
- Since our founding we have worked with hundreds of municipalities and counties, conducting management studies of their operations and recommending improvements.
- Our firm maintains offices in Mountain View, California (where we are incorporated), Illinois (St. Louis Metropolitan area), Massachusetts (Boston metro) and Texas (Dallas Metro).

We are proud of our service philosophy based on detailed analysis, as well as our customized strategy and partnership with our clients. This has resulted in high levels of implementation of our project recommendations – exceeding 85%.

The following table provides some additional general demographic and contact information on our firm.

Legal Name of Firm	Matrix Consulting Group, Ltd.
Year of Formation	2002 (Incorporated in California, January 2003).
Location / Mailing Address for Corporate Headquarters	201 San Antonio Circle, Suite 148 Mountain View, CA 94040 650.858.0507 (voice) 650.917.2310 (fax)

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Corporate Contact	Richard P. Brady, President 650.858-0507 rbrady@matrixcg.net
Current Staff	We currently have 15 full-time and 5 part-time staff.
Services Provided	Management, organizational, shared-services, staffing and operational (efficiency and effectiveness) analysis for public sector entities across the various functions, including: Administration (HR, Finance, IT, etc.) Business Process Documentation Community Development Finance studies, including user fee analysis Fire and Emergency Medical Services Law Enforcement (police, corrections, courts) Organizational Structure Analysis Parks, Recreation and Community Services Public Works Utilities / Infrastructure Maintenance

More detailed information regarding our experience, qualifications, and approach to providing services is contained in the following sections of our proposal.

2. PROJECT APPROACH, WORK PLAN AND STAFF TIME

In this section of our proposal, we outline our approach to providing management consulting services, provide a detailed project work plan, and outline the requirements and impacts on staff time during the engagement.

1. OUR MANAGEMENT STUDIES PHILOSOPHY

Our market niche is based on providing detailed analysis through extensive data collection, input and interaction with our clients. The cornerstone of our philosophy in conducting organization and management studies is summarized in the following points:

- A principal of the firm is always involved in every aspect of each of our studies. This includes interviews of staff, data collection, report writing, client meetings and public presentations. For this project we would commit the Senior Vice President of the company who heads our development services practice. He would be actively involved in every project task and managing the project team.
- Our projects are approached with a firm grounding in formal analytical methodologies. Our clients receive detailed analysis of their specific issues. All impacts are identified and analyzed in detail to ensure that recommendations are implemented and that our clients (and the public they serve) can understand the reasons for recommended changes. This is achieved by:
 - Use of substantive project management techniques.
 - Extensive input from City staff and extensive input from other stakeholders (e.g., elected officials as well as community representatives).
 - Detailed data collection and analysis derived from primary sources.
 - Extensive internal reviews at the departmental and steering committee levels of facts, findings, conclusions and recommendations.
 - Detailed implementation plans, which clearly describe the priority of each recommendation, who should be responsible for change management, the timing for implementation and performance measures to monitor progress.

This philosophy and approach has provided our clients with valuable assistance and advice in dealing with important public policy issues. It also provides a high level of buy-in from all affected stakeholders, as they have multiple opportunities for participation in the study and have the opportunity to be apprised of our progress throughout the term of the engagement. As noted above, it has also resulted in very high levels of implementation of our recommendations.

2. PROJECT MANAGEMENT AND CONTROLS

We believe very strongly in the science of our craft. As a result, we utilize formal project management techniques in our studies. These techniques include:

- All project work activities are defined in advance and tied to each project team member, deliverables, the schedule and the budget.
- The project manager briefs each project team member on his/her roles and expectations. This is accomplished in writing and in person.
- The project manager and lead analyst develop general and project specific data collection plans and interview guides for all of our staff in each departmental function.
- Internal (project team) and external (client) expectations and results are managed on a weekly basis. Formal project schedules and accountability reporting mechanisms are used to report progress.
- The project manager designs and personally reviews all interim and final products before they are delivered to the client.
- We have frequent client review meetings to discuss the quality and direction of the project through interim deliverables.

These project management approaches have resulted in all of our projects being delivered at a high level of quality, on time and on budget.

3. PROPOSED WORK PLAN.

Our proposed approach to providing services to Culver City, to conduct the scope of services outlined in the RFP for the Evaluation of the Development Services Process, is detailed in this section.

Task 1 Identify Key Issues and Develop a Profile of Operations.

To realistically assess the development process, it is important to attain a sense of the direction that Culver City is headed, and the key issues that impact and shape its service requirements. To develop this perspective, we plan to conduct a series of initial interviews with the City Manager, Community Development Director, as well as other key staff involved in the development services processes. These initial interviews will provide an opportunity to identify and isolate factors and constraints which impact current or near-term operations.

Following these initial interviews, we will complete the basic work steps defined below:

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Develop an understanding and map key processing steps involved in the services under review. This includes processes such as: discretionary permit review and approval, building permit plan checking, building permit issuance, capital project planning and management, and code enforcement.
Interview staff involved in the functions under review (at all levels of the organization and from all involved departments), focusing on such issues as: basic work responsibilities, workload and allocation of time on assigned duties, processes linking divisions and departments involved in the process, and documenting staff attitudes toward key strengths and weaknesses of the existing organization.
Interview staff in other City functions (i.e., IT, Finance) that interact with the development process.
Develop a detailed description of service demand and workload trends relating to the development and engineering processes over the past several years.
Document current performance targets for the development process.
Document the current coordination mechanisms and procedures in place to coordinate the development process among the different divisions and departments.
Document major management and information systems available to support operations such as geographic information systems, permitting systems, and project management systems.
Document the policies and regulations utilized by staff involved in the development process. This would include the development of an understanding of policies and regulations within the comprehensive plan and zoning ordinance, the cost recovery policies of the City for the development review process, etc.
Document the staffing, revenue and expenditure trends for the past several years.

Once these initial data collection activities have been completed, we will prepare a profile describing the organization, operations, and workload patterns of the development process for review with the City. This document serves as the “current state” analysis against which any recommended changes are compared.

Deliverable: Detailed profile of the processes, workloads, and staffing allocations for development services.

Task 2 Conduct an Online Survey and Hold Focus Group Meetings to Assess Customer Satisfaction with the Development Process.

To ensure that the project team has a good understanding of the customer’s perspective relative to the service levels provided by the City of Culver City, we will conduct both an online survey and focus groups with prior customers, to understand the key concerns impacting satisfaction levels. This will also be utilized to identify suggestions from customers for improvement opportunities.

- We would develop a comprehensive online survey that is designed to assess the current satisfaction level of customers with a variety of metrics related to development review. Questions would focus on such areas as: customer service, knowledge and helpfulness of staff, timeliness of services, online capabilities, identification of process and procedural issues that impact service provision, etc. The survey would be available online to all customers of the development review process, and specific invitations to participate would be provided to all prior customers from the last year – based upon email availability.
- The project team would also conduct three focus groups with prior customers to elicit more detailed and specific information. While focus groups take more time

and effort than customer satisfaction surveys, the interactivity of a focus group typically provides clearer feedback and enables the project team to follow-up on issues identified in the survey.

The Matrix Consulting Group would conduct up to three focus groups consisting of ten to fifteen participants. The focus groups would consist of different sets of customers, such as architects, contractors, and developers. The participants would be selected based on their knowledge and experience with the City and its development process.

Deliverable: Summary of customer feedback from online survey and focus group meetings identifying key trends and issues.

Task 3 Survey Staff Attitudes Toward the Development Process.

To provide an opportunity for staff input regarding the development review process, we are proposing to conduct an online electronic survey of all staff involved in the development review process. We would prepare and distribute a confidential survey for completion by employees, to gather their input into potential improvement opportunities and challenges they face in providing expected services. The questionnaire would be designed to:

Elicit attitudes toward organizational elements that impact job satisfaction, leadership, performance evaluation, and the like.
Document attitudes toward the level and quality of service provided.
Document attitudes toward the overall commitment of staff to exceptional customer service philosophies.
Determine attitudes toward the adequacy of resources available to employees to accomplish their jobs and deliver services.

Once questionnaires are completed, we will analyze results and prepare an analytical summary that presents the findings of the survey. This summary will be presented to the Project Steering Committee.

Deliverable: Summary report outlining findings of the employee survey.

Task 4 Benchmark Culver City's Development Process Against Best Practices.

The purpose of this task is to evaluate Culver City's development process against development review best practices. This effort provides a comprehensive view and assessment of the existing process and identifies improvement opportunities. In our experience analyzing these issues we have developed a number of "standards" of efficiency and effectiveness, which can be used against most jurisdictions. Illustrative examples of these quantitative and qualitative measures include:

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On-line submittal of minor building permits such as re-roofs, sewer lateral replacement, water heater change outs, and water services using an effective automated permit information system.
Interactive voice response (IVR) or online system for customer use in scheduling inspections 24/7.
Building plan submittal, redlining, and approval over the internet.
Remote inspection data entry by building inspectors.
Twenty-four hour (one workday) turnaround time to building inspection requests.
Cycle goals or performance targets for the completion of plan review activities.
Concurrent processing of building permit plan checks and discretionary permit applications.
Over-the-counter building permit plan check for minor permits (i.e., single family home remodels).
The delegation to a zoning administrator or to staff the authority to approve routine discretionary permits applications.
The concurrent noticing of those current planning applications requiring the approval of both the City Council and Planning Commissions.
The level of delegation to staff for administrative approvals to reduce approval times.
A "one-stop shop" that co-locates all of the functions involved in the development review process.

Once Culver City's development review practices, staffing, and service delivery approaches have been documented in the best practices assessment, we will compare them to results of previous tasks and, to the extent they exist, identify major deviations between the City and these benchmarks. We will note whether the City is currently performing the best practice or whether there is an opportunity for improvement. Each identified opportunity for improvement will be analyzed and considered as a potential process improvement/recommendation.

Deliverable: Detailed best management practices assessment of Culver City's development review and permitting process.

Task 5 Evaluate Development and Related Processes.

We will evaluate Development and related processes to identify opportunities to streamline and more proactively manage the processes. For recommended changes, we will provide an updated process map showing the impact on the current practice. This will be supplemented by the sampling of cases to determine the processing time for different types of permits.

We will then evaluate these processes from a number of perspectives, such as the examples presented in the following table:

The effectiveness with which the City's automated information systems are utilized for permit, plan check, and inspection services and opportunities to improve utilization.
The reasons for delay in the processing of permits based upon the sampling of cases.
The empowering of staff and/or a zoning administrator to approve minor planning permits.
The types of building permit applications that can be submitted on-line.
The proportion of building permits processed over the counter, and whether the City utilizes a hierarchy that results in smaller plans being processed using less complex processes than larger projects.
The extent discretionary permit services are proactively managed based upon performance targets.
The hand-offs between departments and potential to cross-train staff to reduce the number of reviewers.
The permitted uses within the zoning ordinance and the regulatory philosophy reflected by the ordinance.

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The approaches to simplifying the building permit process (such as reducing the number of departments/divisions involved in the review of simpler building permits, using plan checking staff from Building to provide zoning clearance for pools, etc.).

The clarity of submittal requirements for various applications and the completeness of information submitted by customers in discretionary permit and building permit applications and the degree that this impacts the ability of the City to process these applications in a timely fashion.
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The analysis of these issues needs to reflect the unique nature of the City and its service desires and targets. Potential improvement opportunities will be discussed with staff and the project steering committee.

Deliverable: Upon the completion of this task, we will summarize our recommendations in a detailed issues list/preliminary recommendations report regarding process improvements and operational changes.

Task 6 Evaluate Staff Utilization, Work Practices, and Service Levels.

This task involves an evaluation of staff utilization, work practices, and staffing requirements for the City for those staff involved in the development process. It will include drawing on the results of previous tasks. We will address this issue by employing several different approaches, such as those outlined below:

Identify the degree to which each of the divisions utilizes contractors to perform specialized tasks such as building permit plan checking, and the departments philosophy and guidelines for use of contractors (such as the use of contractors for workload peaks versus ongoing workload).

Evaluate opportunities to simplify or reduce staff workload. This analysis would focus on such issues as the use of technology to reduce the workload of staff like the use of IVR integrated into the automated permit information system for reducing the workload associated with scheduling building inspections (and improving customer service since inspections can then be requested on a 24/7 basis). Evaluate opportunities to reduce staff workload with targeted process changes.

Assess the efficiency and effectiveness with which the staff in each service area (building permitting, planning, engineering, etc.) are being utilized and the associated workload.
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Assess the adequacy of the permit issuance and tracking information system utilized in the land entitlement, building permitting and inspection processes. In performing this task, we will compare what exists in Culver City to what the consulting team would expect in modern and progressive city with the size and complexities found in Culver City. For example, is this system being utilized to track the actual processing times to performance targets that exist for development process?
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Assess and evaluate major enabling legislation and city policies regarding their impact on staff activities and service delivery. We would evaluate these policies and procedures from a variety of perspectives, including: clarity of these regulations, the ability to reduce or simplify them to improve service delivery, identify unneeded or duplicative steps, evaluate opportunities to automate steps, and evaluate opportunities to eliminate unnecessary approvals.

The completion of this task will allow the project team, in conjunction with previous tasks, to make recommendations regarding the optimum staffing levels and work practices in the City, opportunities to improve work practices, and opportunities to improve the efficient utilization of this staff.

Deliverable: Summary of the recommendations to improve/simplify work activities and identify the appropriate staffing required to conduct the workload.

Task 7 Document Recommendations in a Final Report and Provide a Detailed Implementation Plan.

After completing our analysis, we will document our findings and recommendations in a final project report. This report will include:

An evaluation of the City's development review and permitting processes, including its work practices, management systems, and the use of technology – including GIS and automated permit systems.
A detailed evaluation of how the Culver City compares to best practices in development review.
Opportunities to streamline processes, increase effectiveness, enhance customer services, etc.
Identification and evaluation of key service levels, including the gaps between target and actual service levels. The analysis will include definition of the relationship between staff utilization and these service levels and explanation of enhancement opportunities.
Detailed staffing recommendations for all functions under review, including short, medium and long term needs based upon projected population and development activity.
An implementation plan covering all recommended process improvements consisting of: • Specific implementation work steps. • Suggested responsibility for implementation. • Timing/phasing for accomplishing each work step. • Cost and/or savings impact of each recommended improvement.

We would plan to review the draft report with project steering committee, if one is established. Based on the results of that review, clarifications and additional analysis will be provided as appropriate and a final report developed. We will present the final report to the City at a public meeting, or another forum, as requested.

Deliverable: Final report containing detailed recommendations and a process improvement plan for the development review process.

2. PROPOSED PROJECT SCHEDULE.

As shown in the following table, we are proposing a twelve (12) week schedule to complete this engagement.

Task	1	2	3	4	5	6	7	8	9	10	11	12
1. Initial Interviews and Profile												
2. Customer Input - Survey/ Focus Groups												
3. Employee Input - Survey												
4. Best Practices Assessment												
5. Evaluate Processes												
6. Operational / Staffing Analysis												
7. Report Development												

At the conclusion of each task, the project team will provide a written deliverable, as previously outlined in our work plan, for review.

3. PROJECT BUDGET

The Matrix Consulting Group would be prepared to enter into a contractual agreement with Culver City to conduct the Evaluation of the Development Services Process project for a not-to-exceed cost of **\$50,000**. This price includes the cost of all professional time and reimbursable expenses.

We have shown the project costs, including estimated costs to conduct each task outlined in our proposal, in the following table.

Tasks	PM / Lead Analyst	Analyst	Total Hours
1. Initial Interviews and Profile	32	32	64
2. Customer Input - Survey / Focus Groups	16	12	28
3. Employee Input – Survey	4	16	20
4. Best Practices Assessment	24	16	40
5. Evaluate Processes	20	24	44
6. Operational / Staffing Analysis	20	24	44
7. Report Development	24	16	40
TOTAL HOURS	140	140	280
Hourly Rate	\$200	\$125	
Professional Cost	\$28,000	\$17,500	\$45,500
Travel and Expenses			\$4,500
Total Cost			\$50,000

We would be happy to enter into a fixed price, not-to-exceed contract for this engagement. We typically bill monthly for actual expenses incurred in completing the project tasks. However, we are amenable to payment terms based upon completion of deliverables.

4. FIRM QUALIFICATIONS AND REFERENCES

This section of our proposal provides background regarding our qualifications and prior experience conducting comparable studies of development services functions, and provides specific project references.

1. FIRM EXPERIENCE AND QUALIFICATIONS.

Our firm has extensive experience conducting development review studies, both as part of city-wide organizational studies evaluating all departments, and in dedicated studies focused entirely on the development review functions. The following table outlines our experience evaluating development review functions as part of an organization-wide study (California communities in **bold**):

Albuquerque, New Mexico Augusta, Georgia Barstow, California Brattleboro, Vermont Deltona, Florida Franklin Township, New Jersey Fort Morgan, Colorado Goodyear, Arizona Greenbelt, Maryland	Half Moon Bay, California Johnson County, Kansas Matanuska Borough, Alaska Monroe County, Michigan Monrovia, California Montpelier, Vermont Orland Park, Illinois Orleans, Massachusetts Portsmouth, New Hampshire	Rancho Mirage, California Rancho Palos Verdes, California Raymore, Missouri Roseville, California San Clemente, California San Rafael, California Spokane, Washington Sunnyvale, California Waltham, Massachusetts
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The following table outlines our recent experience evaluating development review activities as stand alone studies. Our California experience is in **bold**:

Arlington County, Virginia Beverly Hills, California Cupertino, California Dayton, Ohio DeKalb County, Georgia (current client) Des Moines, Washington East Palo Alto, California Glendale, California Greenville, South Carolina Gresham, Oregon Gwinnett County, Georgia Hanover County, Virginia Hilton Head Island, South Carolina Johnson City, Tennessee Kissimmee, Florida Lake Oswego, Oregon Lawrence, Kansas Lee's Summit, MO	Lee's Summit, Missouri Los Angeles, California (current client) Manatee County, Florida Marion County, Oregon Napa, California Oceanside, California Pasadena, California Salem, Oregon San Francisco, California San Mateo, California San Jose, California Santa Monica, California Springfield, Massachusetts Tiburon, California Sunrise, Florida (2 studies) West Hollywood, California West Palm Beach, Florida West Palm Beach, FL
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We would also like to highlight our work with the City of Los Angeles (CA) and DeKalb County (GA), where we are currently assisting them in the implementation of our recommendations.

2. FIRM REFERENCES.

The following table provides specific project references for comparable studies completed by the firm:

Client	Abstract	Contact
City of Los Angeles, California Management Study of the Development Services Process	In this study, the Matrix Consulting Group evaluated opportunities to streamline and improve the management of the development services process. This included an evaluation of the Department of City Planning, Department of Building and Safety, Department of Public Works and the Department of Transportation. The report contained over 300 recommendations that focused on enhancement of technology, co-location of staff, streamlining of business processes, the regulatory framework, how to engage employees in the transformation of the development review process, and the organizational structure of the departments involved in the development review process. The City has retained the Matrix Consulting Group to assist the City in implementation of the recommendations.	Ray Chan General Manager Department of Building and Safety (213) 792-6123 raymond.chan@lacity.org or Jason Killeen Senior Administrative Analyst Office of the City Administrative Officer (213) 473-7574 jason.killeen@lacity.org
Beverly Hills, California Analysis of the Community Development Department	The Matrix Consulting Group conducted an organizational and operational review and analysis of the Community Development Department. This analysis included an evaluation of the permit, plan check, and inspection processes, the plan of organization, a best practices analysis, an evaluation of staffing levels, the adequacy of the use of technology, and an evaluation of the processing of entitlement and ministerial permits against cycle time performance targets.	George Chavez Public Works Services Director (formerly Asst. Director of Community Services / Chief Building Official) (310) 285-1141 gchavez@beverlyhills.org

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Client	Abstract	Contact
San Jose, California Management Study of the Development Services Division, Public Works Department	In this assignment, the project team conducted a comprehensive analysis of the Development Services Division's existing operations, service levels, management, and staffing levels. The analysis included an evaluation of the organizational structure, including the division of labor and managerial / supervisory spans of control, the staffing and service levels including, but not limited to, staff assignments, workload, training, and the cost-effectiveness of service levels and service delivery, and the processes used by the Division to deliver services to its customers including opportunities to streamline and enhance managing these processes.	Primo DeGuzman Development Services Division Manager Public Works Department (408) 535-8466 primodeguzman@sanjose.gov
Glendale, California Analysis of Permit Processes	In this assignment, the project team analyzed cross-departmental issues relating to all development functions and designed to identify opportunities to improve processing times. The project team also recommended changes to the staffing of development functions, information and management systems supporting development services and performance metrics developed through the 'best practices' assessment.	William Fox Finance Director, City of Vernon (Previously the Internal Audit Manager for the City of Glendale) (323) 583-8811 x849 wfox@ci.vernon.ca.us
Lake Oswego, Oregon Management Study of the Community Development Department	The Matrix Consulting Group conducted a comprehensive organization and management analysis of the Community Development Department's existing operations, service levels, management, and staffing levels including code enforcement. This included the (1) organizational structure of the Department, including managerial / supervisory spans of control; (2) staffing and service levels including, but not limited to, staff assignments, workload, training, and the cost-effectiveness of service levels including long-range planning, current planning, building and safety (including code enforcement), engineering, and technology; and (3) the processes used to deliver services including opportunities to streamline and enhance the management of these processes.	Alex McIntyre City Manager of Menlo Park (Formerly the City Manager of Lake Oswego) (650) 330-6610 admccintyre@menlopark.org

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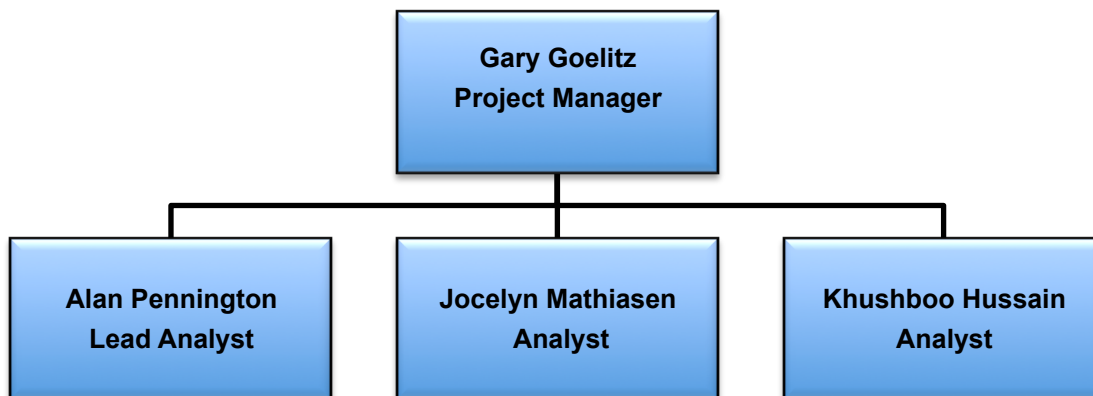
Client	Abstract	Contact
Pasadena, California Management Study of the Development Review Process	In this assignment, the project team analyzed the development review processes for the City, including building, planning, fire prevention, development engineering, utilities, and environmental health, but also included the analysis of code enforcement. Principal recommendations regarding code enforcement involved modifying the occupancy inspection program, developing protocols for multi-departmental responses to code enforcement complaints, enhancing relations with neighborhood associations and businesses, enhancing the effectiveness of case management, and reducing staffing.	Vince Bertoni Planning Director Pasadena Planning and Community Development Department (626) 744-4650 vbertoni@cityofpasadena.net

We would be happy to provide additional references or information on any prior studies conducted by the firm.

5. PROJECT TEAM

This study requires consultants who have extensive experience in evaluating municipal organizations and who are subject matter experts in the evaluation of development services functions. As such, we have proposed a very experienced project team, as shown below.

**Culver City Project Team
Development Services Process Project**



The following points provide brief biographies, including relevant experience, for each of our proposed team members.

- GARY GOELITZ** – Mr. Goelitz is a Senior Vice President with the Matrix Consulting Group and leads our development review practice. He has over 34 years of experience as an analyst in the public sector, both as a consultant and a manager in municipal operations. He has been with the Matrix Consulting Group since its founding in 2002. He also was a Director for MAXIMUS. Mr. Goelitz has served as a management analyst for the cities of Chula Vista (CA), Phoenix (AZ), and Beverly Hills (CA) as well as the Internal Audit Manager for Washoe County (NV). Mr. Goelitz has broad experience in the community development area and has completed multiple analyses of development services functions in the past several years – including Arlington County (VA), Beverly Hills (CA), Cupertino (CA), West Hollywood (CA), Gwinnett County (GA), Lawrence (KS), Lee’s Summit (MO), Napa (CA), Los Altos (CA) and others. He has been our project manager and lead analyst on our work for the past two years for the City of Los Angeles. He also led the analysis of these functions in our recent citywide studies, including Spokane (WA), Goodyear (AZ), Brattleboro (VT), Waltham (MA), Lathrop (CA), Los Gatos (CA), Roseville (CA) and Walnut Creek (CA). He holds both B.A. and MPA degrees from the University of Southern California. ***Mr. Goelitz will serve as the Project Manager on this engagement.***

- **ALAN PENNINGTON** – Mr. Pennington is a Vice President with the Matrix Consulting Group and is based in our St. Louis area office. He has been with the firm since 2005. He has over 15 years of experience as a top manager in the public sector in Illinois and Maine before joining Matrix. His experience conducting development review studies includes Cupertino (CA), Dayton (OH), DeKalb County (GA), Des Moines (WA), Greenville (SC), Gwinnett County (GA), Hanover County (VA), Hilton Head Island (SC), Johnson City (TN), Kissimmee (FL), Lawrence (KS), Lee's Summit (MO), Manatee County (FL), San Jose (CA), Springfield (MA), Sunrise (FL), and West Palm Beach (FL). In addition to these studies, Mr. Pennington has evaluated building and planning departments as part of larger organization-wide studies. This experience includes the following clients: Fort Morgan (CO), Franklin Township (NJ), Johnson County (KS), Montpelier (VT), Mt. Lebanon (PA), Orland Park (IL), Rancho Mirage (CA), Rancho Palos Verdes (CA), and Raymore (MO). Mr. Pennington is trained in the deployment of Six Sigma for governmental agencies. Mr. Pennington is a member of the following professional associations: American Planning Association, International Code Council and American Association for Code Enforcement. Mr. Pennington has a BA (Public Management) and MPA from the University of Maine. ***Mr. Pennington will serve as Lead Analyst.***

- **JOCELYN MATHIASSEN** is a Manager with Matrix Consulting Group and brings over 15 years of consulting and public sector experience at the local and state levels. Her primary work areas include streamlining municipal operations to enhance customer service and efficiencies, often in areas that cross departmental lines. Most recently she served as Director of Permitting and Land Use for the city of Milford, Connecticut. Ms. Mathiasen's recent clients involving review of development review functions include: DeKalb County (GA), Kissimmee (FL), and Los Angeles (CA). She received a Master of Public Policy from Harvard University and a BA in Government from Oberlin College. ***Ms. Mathiasen will serve as an Analyst on this engagement.***

- **KHUSHBOO HUSSAIN** is a Consultant with the Matrix Consulting Group. Most recently, Ms. Hussain has assisted with financial and management studies and analysis for the following jurisdictions: Elk Grove (CA), Fresno (CA), Long Beach (CA), Montville (NJ), Pasadena (CA), Rancho Mirage (CA), San Pablo (CA), San Mateo (CA), Springdale (AR), University of Maryland University College (MD) and Willits (CA). Prior to joining the Matrix Consulting Group, Ms. Hussain was an analyst in international relations and government service delivery. She received a BA in International Economics and an MA in International Affairs from the University of California – San Diego. ***Ms. Hussain will serve as an Analyst on this engagement.***

More detailed resumes for our senior team members are located on the following pages.

CULVER CITY, CALIFORNIA**Proposal to Conduct an Evaluation of the Development Services Process**
GARY GOELITZ
SENIOR VICE PRESIDENT, MATRIX CONSULTING GROUP
BACKGROUND:

Gary Goelitz is a Senior Vice President with the Matrix Consulting Group. He has been providing management consulting and analytical services to government for 34 years. This experience includes being a management analyst for the cities of Chula Vista, Beverly Hills, and Hanford, California; the Senior Internal Audit for Washoe County (Reno), Nevada; and, most recently as the west coast Director of a national consulting firm where Mr. Goelitz was a consultant to local government specializing in the analysis of development review services prior to founding the Matrix Consulting Group. Mr. Goelitz has been involved with the analysis of hundreds of local government service.

Agency-Wide Studies: Conducts studies of all departments and functions within a city or county during one comprehensive project. Scopes of work include assessing organizational and operational efficiency, business process and re-engineering, allocation of functions, management spans of control, and service and staffing levels.

Barstow, California
 Brattleboro, Vermont
 Lathrop, California
 Los Gatos, California
 Palo Alto, California

Prescott Valley, Arizona
 San Clemente, California
 Sunnyvale, California
 Waltham, Massachusetts

Planning, Building and Safety, and Development Engineering: Conducted studies of development review functions for local government including planning, building and safety, and development engineering. Studies included evaluations of the organization of these functions, overlaps and duplications of functions, cycle times for permits, technology, fees and cost recovery.

Arlington County (VA)
 Beverly Hills (CA)
 Campbell (CA)
 Cupertino (CA)
 Dublin (CA)
 Emeryville (CA)
 Glendale (CA)
 Goodyear (AZ)
 Gresham (OR)
 Gwinnett County (GA)
 Lake Oswego (OR)
 Lawrence (KS)
 Lee's Summit (MO)
 Livermore (CA)
 Los Altos (CA)
 Los Altos Hills (CA)
 Modesto (CA)
 Morgan Hill
 Mountain View (CA)
 Napa (CA)
 Newark (CA)
 Novato (CA)

Oceanside (CA)
 Oxnard (CA)
 Palo Alto (CA)
 Peoria (AZ)
 Pismo Beach (CA)
 Poway (CA)
 Riverside (CA)
 San Clemente (CA)
 San Francisco (CA)
 San Luis Obispo (CA)
 San Mateo (CA)
 San Rafael (CA)
 San Ramon (CA)
 Santa Monica (CA)
 Southlake (TX)
 Spokane (WA)
 Springfield (MA)
 Tiburon (CA)
 Walnut Creek (CA)
 Waltham (MA)
 West Hollywood (CA)

CULVER CITY, CALIFORNIA**Proposal to Conduct an Evaluation of the Development Services Process**
GARY GOELITZ
SENIOR VICE PRESIDENT, MATRIX CONSULTING GROUP

Administrative Services: Conducting studies of internal service functions including Human Resources, Information Technology, Purchasing, Internal Audit, and Budget. Scopes of work including process improvement, best practice assessments, optimization of staffing and operations, and organizational structure.

Brattleboro (VT) Finance and IT
 Charlotte (NC) - Purchasing
 Hayward (CA) Finance
 Moorpark (CA) - Finance
 Salt Lake City (UT) – IT

San Rafael (CA) - Finance
 Sunnyvale (CA) – Finance
 Sunnyvale (CA) – Budget
 Sunnyvale (CA) - Purchasing
 Waltham (MA) – Finance and IT

Parks and Recreation: Evaluated parks and recreational functions for local government. Scopes of work included how services meet community needs, the utilization of programs and facilities, the depth of recreational programs, public-private partnerships, technology, parks preventive maintenance and coordination of services with other service providers.

Alexandria, (VA)
 Benicia (CA)
 Beverly Hills, (CA)
 Brattleboro (VT)
 Clark County (NV)
 Danville (CA)
 Davis (CA)
 Hanford (CA)
 Livermore Parks and Recreation District (CA)
 Los Angeles (CA)

Los Gatos (CA)
 Palo Alto (CA)
 Poway (CA)
 Richmond (CA)
 Salt Lake City (UT)
 San Clemente (CA)
 San Rafael (CA)
 Stockton (CA)
 Waltham (MA)
 Washoe County (NV)

Public Works and Utilities: Conducted studies of road, parks, fleet, traffic and other infrastructure maintenance in addition to engineering. Study scopes included the effectiveness of maintenance management, responsiveness to urgent and emergency calls, technology, crew sizes, fleet utilization and specifications, staff utilization and the level of service to the community served,

Alameda County (CA)
 Beverly Hills (CA)
 Burbank (CA)
 Campbell (CA)
 Concord (CA)
 Danville (CA)
 Hayward (CA)
 Hermiston (OR)
 Imperial Irrigation District (CA)

Long Beach (CA)
 Modesto (CA)
 Oakland (CA)
 Nashville (TN)
 Pasadena (CA)
 Redwood City (CA)
 Salt Lake City (UT)
 Scottsdale (AZ)
 Springfield (MA)

EDUCATION:

Mr. Goelitz received his B.A. and M.P.A. degrees from the University of Southern California.

CULVER CITY, CALIFORNIA**Proposal to Conduct an Evaluation of the Development Services Process**
ALAN D. PENNINGTON
VICE PRESIDENT, MATRIX CONSULTING GROUP
BACKGROUND:

Alan Pennington is a Vice President with the Matrix Consulting Group based in the St. Louis regional office. He has been employed by the Matrix Consulting Group since 2005. Prior to that he served for over 15 years in public sector positions in Maine and Illinois. He served in Peoria, Illinois (from 1992 to 2005), in various positions including Assistant City Manager, Assistant Human Resources Director, and Labor Relations Manager. Mr. Pennington has conducted operational studies and analysis, budget preparation, implementation of performance measurement systems, direct supervision of an emergency communications center, equal opportunity unit and a labor negotiator.

Agency-Wide Studies: Participated on project teams conducting evaluations of entire city organizations. Work scope included evaluation of business processes, service levels, policies and procedures, staffing levels, evaluation of spans of control, and reviewing alternatives options for overall organizational structure.

Albuquerque, New Mexico
 Avon, Connecticut
 Fort Morgan, Colorado
 Franklin Township, New Jersey
 Half Moon Bay, California
 Johnson County, Kansas
 Montpelier, Vermont
 Mt. Lebanon, Pennsylvania
 Orland Park, Illinois

Orleans, Massachusetts
 Peoria County, Illinois
 Rancho Mirage, California
 Rancho Palos Verdes, California
 Raymore, Missouri
 Roseville, California
 South Coast Water District, California
 University at Albany, SUNY – New York
 Washington State Ferries

Administrative Services: Conducted studies of administrative support services including Human Resources, Finances, Procurement, and City Clerk. Study scope of work included performance measurement, customer service (internal and external), technology utilization, staffing evaluations, policy and procedure review, and comparison to best management practices.

Avon (CT) - HR, Finance, Maintenance
 Charlotte (NC) - Procurement
 CPS Consultants (CA) – Organizational, HR
 Highland Park (IL) – HR
 Ketchikan (AK) - HR
 Marshall University (WV) - Procurement
 Matanuska (AK) - School Site Selection
 Peoria County (IL) - HR, Procurement, Finance
 Portsmouth (NH) - Labor Relations, Overtime

Portsmouth (NH) - Labor Relations, Overtime
 Reno/Washoe County (NV) – Procurement
 Salt Lake City (UT) - Human Resources
 Santa Clara Valley Water (CA) - Procurement
 Springfield (MA) - City Clerk
 Springfield (MA) - Finance, Procurement
 Sunnyvale (CA) – Finance, Procurement
 Volusia County Transportation Planning
 Organization (FL) – Human Resources
 West Virginia University (WV) – Procurement

Community Development (Planning, Building, Code Enforcement): Evaluated the development review and permitting processes. Conducted assessment of staffing, operations, process mapping, technology utilization, performance level assessment, and customer service.

Cupertino, California
 Dayton, Ohio
 Des Moines, Washington
 Greenville, South Carolina
 Gwinnett County, Georgia
 Hanover County, Virginia
 Hilton Head Island, South Carolina
 Johnson City, Tennessee
 Kissimmee, Florida

Lawrence, Kansas
 Lee's Summit, Missouri
 Little Rock, Arkansas
 Manatee County, Florida
 Marion County, Oregon
 San Jose, California
 Springfield, Massachusetts
 Sunrise, Florida (two studies)
 West Palm Beach, Florida

CULVER CITY, CALIFORNIA**Proposal to Conduct an Evaluation of the Development Services Process**

ALAN D. PENNINGTON VICE PRESIDENT, MATRIX CONSULTING GROUP	
Parks and Recreation: Evaluated parks and recreational functions including scope of services provided, utilization of facilities, public-private partnerships, preventive maintenance and long-range planning, and technology utilization.	
Grand Rapids, Michigan Los Angeles, California	Orleans, Massachusetts Southlake, Texas
Public Works and Utilities: Conducted studies of full service public works departments including maintenance, fleet, traffic, engineering, and roads. Studies have focused on evaluation of maintenance management, crew staffing and personnel, technology, organizational structure, standard operating procedures, levels of performance management, and feasibility of shares services with neighboring governmental units.	
Alexandria, Virginia Charleston County, South Carolina Franklin, Tennessee (Water/Wastewater) Franklin, Tennessee (Fleet Management)	Milwaukee, Wisconsin Nashville-Davidson County, Tennessee Orleans, Massachusetts Washington County, New York
Courts: Conducted evaluation of the Court Clerk Administrative Operations. Areas evaluated including Court Clerk utilization, training and allocation, technology, finances, human resources, revenue collection, and policies and procedures related to support the Court and Judges.	
Franklin County, Ohio (Municipal Court Clerk)	Nashville-Davidson, Tennessee (Juvenile Ct. Clerk)
Public Safety: Mr. Pennington has conducted a variety of studies related to public safety areas covering the range of Police and Fire Services. On larger studies, Mr. Pennington has focused on evaluation and assessment of the Administrative Services (Human Resources, Finance, Records Administration, etc.).	
Des Peres, Missouri (Public Safety) Jacksonville, Florida Sheriff (Admin. Services) Omaha, Nebraska (Collective Bargaining)	Orange County Sheriff, Florida (Admin. Services) Raymore, Missouri (Police) West Des Moines, Iowa (Fire)
PROFESSIONAL ASSOCIATIONS: American Association of Code Enforcement (AACE) American Planning Association (APA) International Code Council (ICC) International City/County Management Association (ICMA)	
KEY SKILLS: Six Sigma Deployment Champion Certified Mediator – DePaul University School of Law Certificate	
EDUCATION: BA, University of Maine – Public Management; 1990. MPA, University of Maine – Public Administration, 1992.	

CULVER CITY, CALIFORNIA**Proposal to Conduct an Evaluation of the Development Services Process****JOCELYN MATHIASSEN
MANAGER, MATRIX CONSULTING GROUP****BACKGROUND:**

Jocelyn Mathiasen is a professional manager with the ability to lead complex projects and programs, strong written and oral communications skills, and a commitment to excellence. She has experience working with local governments, businesses, development banks, and non-profits in the US and abroad.

Permitting and Use: As department director, led the reform of the Department of Permitting and Land Use for the City of Milford, Connecticut, transforming the agency into one focused on customer service and efficiency. Consolidated planning, wetlands, floodplain management, and building review processes to reduce duplication of time and effort, cross-trained clerical staff, and developed improved educational materials and website information to reduce confusion on the part of applicants. Implemented on-line permitting for all projects. Eliminated wait lines outside of the Building department (a major source of frustration) through establishment of an on-line, virtual queue. Established electronic field inspections so that inspectors could enter results into a tablet computer on-site with the information immediately uploaded to the internet and back-end permit tracking program.

Working for the Capitol Region Council of Governments, led a consortium of ten municipalities in the development of a regional permitting software program that could be used for on-line applications as well as back-office management of the permit review process across multiple disciplines, including health and fire as well as traditional land use agencies. Worked directly with IT directors and building officials from municipalities to ensure that the system met their needs and that concerns were addressed. Led creation of the web site www.viewmypermitct.org as a portal through which permit applicants could apply, pay for, and receive permits from numerous cities.

As Assistant to the City Manager in Bellevue, Washington, worked with five review agencies (building, land use, utilities, transportation, and fire) to make the land use and permitting process more efficient and customer friendly. Conducted a detailed fee study leading to City Council approval of a revised fee schedule that was consistent across reviewing agencies and allowed for greater stability in staffing through construction cycles. Oversaw the creation of a streamlined process for review and approval of simple residential remodel projects as well as commercial tenant fit-out projects. The project resulted in measurable improvements in timelines, customer satisfaction, and staff morale. It was selected as a case study at the 2005 Innovations in Government conference in Sarasota, Florida.

Service Delivery: Managed several initiatives to streamline and simplify service delivery to citizens and businesses seeking to do business with municipal government. In Bellevue, Washington led an initiative to organize and implement "Service First," combining multiple front-line services to simplify and streamline citizens' interactions with the city. Worked with all town departments to identify and address concerns related to the relocation of city operations from multiple locations to a single new downtown Civic Center. Identified opportunities to improve efficiencies and deliver better customer service through design of public areas.

CULVER CITY, CALIFORNIA**Proposal to Conduct an Evaluation of the Development Services Process**
JOCELYN MATHIASSEN
MANAGER, MATRIX CONSULTING GROUP

Administrative Services: For the city of Bellevue, Washington the Capitol Region Council of Governments in Hartford, Connecticut conducted studies of administrative functions, including budgeting, human resources, information technology, purchasing and risk management. Worked with elected officials to design and obtain approval for new procurement policies for professional services. Reviewed agency human resource benefits and, working with employees, unions, and benefits providers, identified changes to the overall benefits framework that would add value for employees while controlling costs. Reviewed outdated personnel policies, and worked with managers, employees, union officials, and elected officials to draft and obtained approval for revised policies in a broad range of areas including: internet usage, laptop security, parking and carpooling, and telecommuting. Revamped and prepared agency budget documents, resulting in CRCOG's first Government Finance Officers Association award for Excellence in Budget Preparation.

Emergency Preparedness and Emergency Response: Served as liaison to Emergency Operations Committees, participating in drills, assisting with after-action assessments, and working directly on two major disasters and their aftermath.

Regionalization: For the Capitol Region Council of Governments conducted a detailed study of opportunities for regional service sharing among Connecticut municipalities. Managed a complex grant application process that resulted in \$8.6 million in municipal Service Sharing grants for pilot projects demonstrating benefits of regional service sharing.

PUBLIC PRESENTATIONS:

- Regional Approaches to Municipal Finance, Assessment & Central Office Functions – Office of Policy Management Conference on Municipal Shared Services in Connecticut – 2010
- Regional On-Line Permitting - New England Association of Regional Councils Conference, Bretton Woods, NH – 2009
- Municipal Shared Services in Connecticut – New England Association of Regional Councils, Northampton, MA – 2008
- From Chaos to Harmony: Reforming Development Services – Transforming Local Government Conference, Sarasota, FL – 2005

EDUCATION:

Ms. Mathiasen received a BA in Government from Oberlin College in Oberlin, Ohio and a Master of Public Policy from Harvard University in Cambridge, Massachusetts.