

THIS AGREEMENT is entered into on _____, 20__ between the City of Redmond, Washington, hereinafter called "the CITY", and the above person, firm or organization, hereinafter called "the CONSULTANT".

WHEREAS, the CITY desires to accomplish the above-referenced project; and

WHEREAS, the CITY does not have sufficient staff or expertise to meet the required commitment and therefore deems it advisable and desirable to engage the assistance of a CONSULTANT to provide the necessary services for the project; and

WHEREAS, the CONSULTANT has represented to the CITY that the CONSULTANT is in compliance with the professional registration statutes of the State of Washington, if applicable, and has signified a willingness to furnish consulting services to the CITY, now, therefore,

IN CONSIDERATION OF the terms and conditions set forth below, or attached and incorporated and made a part hereof, the parties agree as follows:

1. **Retention of Consultant - Scope of Work.** The CITY hereby retains the CONSULTANT to provide professional services as defined in this agreement and as necessary to accomplish the scope of work attached hereto as Exhibit A and incorporated herein by this reference as if set forth in full. The CONSULTANT shall furnish all services, labor and related equipment necessary to conduct and complete the work, except as specifically noted otherwise in this agreement.

2. **Completion of Work.** The CONSULTANT shall not begin any work under the terms of this agreement until authorized in writing by the CITY. The CONSULTANT shall complete all work required by this agreement according to the schedule attached as Exhibit B and incorporated herein by this reference as if set forth in full. A failure to complete the work according to the attached schedule, except where such failure is due to circumstances beyond the control of the CONSULTANT, shall be deemed a breach of this agreement. The established completion time shall not be extended because of any delays attributable to the CONSULTANT, but may be extended by the CITY, in the event of a delay attributable to the CITY, or because of unavoidable delays caused by circumstances beyond the control of the CONSULTANT. All such extensions shall be in writing and shall be executed by both parties.

3. **Payment.** The CONSULTANT shall be paid by the CITY for satisfactorily completed work and services satisfactorily rendered under this agreement as provided in Exhibit C, attached hereto and incorporated herein by this reference as if set forth in full. Such payment shall be full compensation for work performed or services rendered and for all labor, materials, supplies, equipment, and incidentals necessary to complete the work specified in the Scope of Work attached. The CONSULTANT shall be entitled to invoice

the CITY no more frequently than once per month during the course of the completion of work and services by the CONSULTANT. Invoices shall detail the work performed or services rendered, the time involved (if compensation is based on an hourly rate) and the amount to be paid. The CITY shall pay all such invoices within 30 days of submittal, unless the CITY gives notice that the invoice is in dispute. In no event shall the total of all invoices paid exceed the maximum amount payable set forth above, if any, and the CONSULTANT agrees to perform all services contemplated by this agreement for no more than said maximum amount.

4. Changes in Work. The CONSULTANT shall make such changes and revisions in the complete work provided by this agreement as may be necessary to correct errors made by the CONSULTANT and appearing therein when required to do so by the CITY. The CONSULTANT shall make such corrective changes and revisions without additional compensation from the CITY. Should the CITY find it desirable for its own purposes to have previously satisfactorily completed work or parts thereof changed or revised, the CONSULTANT shall make such revisions as directed by the CITY. This work shall be considered as Extra Work and will be paid for as provided in Section 5.

5. Extra Work.

A. The CITY may, at any time, by written order, make changes within the general scope of the agreement in the services to be performed. If any such change causes an increase or decrease in the estimated cost of, or the time required for, performance of any part of the work or services under this agreement, whether or not changed by the order, or otherwise affects any other terms or conditions of the agreement, the CITY shall make an equitable adjustment in the (1) maximum amount payable; (2) delivery or completion schedule or both; and (3) other affected terms, and shall modify the agreement accordingly.

B. The CONSULTANT must submit any "proposal for adjustment" under this clause within 30 days from the date of receipt of the written order to make changes. However, if the CITY decides that the facts justify it, the CITY may receive and act upon a proposal submitted before final payment of the agreement.

C. Failure to agree to any adjustment shall be a dispute under the Disputes clause of this agreement, as provided in Section 13. Notwithstanding any such dispute, the CONSULTANT shall proceed with the agreement as changed.

D. Notwithstanding any other provision in this section, the maximum amount payable for this agreement shall not be increased or considered to be increased except by specific written amendment of this agreement.

6. **Ownership of Work Product.** Any and all documents, drawings, reports, and other work product produced by the CONSULTANT under this agreement shall become the property of the CITY upon payment of the CONSULTANT'S fees and charges therefore. The CITY shall have the complete right to use and re-use such work product in any manner deemed appropriate by the CITY, provided, that use on any project other than that for which the work product is prepared shall be at the CITY'S risk unless such use is agreed to by the CONSULTANT.

7. **Independent Contractor.** The CONSULTANT is an independent contractor for the performance of services under this agreement. The CITY shall not be liable for, nor obligated to pay to the CONSULTANT, or any employee of the CONSULTANT, sick leave, vacation pay, overtime or any other benefit applicable to employees of the CITY, nor to pay or deduct any social security, income tax, or other tax from the payments made to the CONSULTANT which may arise as an incident of the CONSULTANT performing services for the CITY. The CITY shall not be obligated to pay industrial insurance for the services rendered by the CONSULTANT.

8. **Indemnity.** The CONSULTANT agrees to hold harmless, indemnify and defend the CITY, its officers, agents, and employees, from and against any and all claims, losses, or liability, for injuries, sickness or death of persons, including employees of the CONSULTANT, or damage to property, arising out of any willful misconduct or negligent act, error, or omission of the CONSULTANT, its officers, agents, subconsultants or employees, in connection with the services required by this agreement, provided, however, that:

A. The CONSULTANT's obligations to indemnify, defend and hold harmless shall not extend to injuries, sickness, death or damage caused by or resulting from the sole willful misconduct or sole negligence of the CITY, its officers, agents or employees; and

B. The CONSULTANT's obligations to indemnify, defend and hold harmless for injuries, sickness, death or damage caused by or resulting from the concurrent negligence or willful misconduct of the CONSULTANT and the CITY, or of the CONSULTANT and a third party other than an officer, agent, subconsultant or employee of the CONSULTANT, shall apply only to the extent of the negligence or willful misconduct of the CONSULTANT.

9. **Insurance.** The CONSULTANT shall provide the following minimum insurance coverages:

A. Worker's compensation and employer's liability insurance as required by the State of Washington;

B. General public liability and property damage insurance in an amount not less than a combined single limit of two million dollars (\$2,000,000) for bodily injury, including death, and property damage per occurrence.

C. Professional liability insurance, if commercially available in CONSULTANT's field of expertise, in the amount of two million dollars (\$2,000,000) or more against claims arising out of work provided for in this agreement.

The amounts listed above are the minimum deemed necessary by the CITY to protect the CITY'S interests in this matter. The CITY has made no recommendation to the CONSULTANT as to the insurance necessary to protect the CONSULTANT'S interests and any decision by the CONSULTANT to carry or not carry insurance amounts in excess of the above is solely that of the CONSULTANT.

All insurance shall be obtained from an insurance company authorized to do business in the State of Washington. Excepting the professional liability insurance, the CITY will be named on all insurance as an additional insured. The CONSULTANT shall submit a certificate of insurance to the CITY evidencing the coverages specified above, together with an additional insured endorsement naming the CITY, within fifteen (15) days of the execution of this agreement. The additional insured endorsement shall provide that to the extent of the CONSULTANT's negligence, the CONSULTANT's insurance shall be primary and non-contributing as to the City, and any other insurance maintained by the CITY shall be excess and not contributing insurance with respect to the CONSULTANT's insurance. The certificates of insurance shall cover the work specified in or performed under this agreement. No cancellation, reduction or modification of the foregoing policies shall be effective without thirty (30) days prior written notice to the CITY.

10. Records. The CONSULTANT shall keep all records related to this agreement for a period of three years following completion of the work for which the CONSULTANT is retained. The CONSULTANT shall permit any authorized representative of the CITY, and any person authorized by the CITY for audit purposes, to inspect such records at all reasonable times during regular business hours of the CONSULTANT. Upon request, the CONSULTANT will provide the CITY with reproducible copies of any such records. The copies will be provided without cost if required to substantiate any billing of the CONSULTANT, but the CONSULTANT may charge the CITY for copies requested for any other purpose.

11. Notices. All notices required to be given by either party to the other under this Agreement shall be in writing and shall be given in person or by mail to the addresses set forth in the box for the same appearing at the outset of this Agreement. Notice by mail shall be deemed given as of the date the same is deposited in the United States mail, postage prepaid, addressed as provided in this paragraph.

12. **Project Administrator.** The Project Administrator shall be responsible for coordinating the work of the CONSULTANT, for providing any necessary information for and direction of the CONSULTANT's work in order to ensure that it meets the requirements of this Agreement, and for reviewing, monitoring and approving the quality and quantity of such work. The CONSULTANT shall report to and take any necessary direction from the Project Administrator.

13. **Disputes.** Any dispute concerning questions of fact in connection with the work not disposed of by agreement between the CONSULTANT and the CITY shall be referred for resolution to a mutually acceptable mediator. The parties shall each be responsible for one-half of the mediator's fees and costs.

14. **Termination.** The CITY reserves the right to terminate this agreement at any time upon ten (10) days written notice to the CONSULTANT. Any such notice shall be given to the address specified above. In the event that this agreement is terminated by the City other than for fault on the part of the CONSULTANT, a final payment shall be made to the CONSULTANT for all services performed. No payment shall be made for any work completed after ten (10) days following receipt by the CONSULTANT of the notice to terminate. In the event that services of the CONSULTANT are terminated by the CITY for fault on part of the CONSULTANT, the amount to be paid shall be determined by the CITY with consideration given to the actual cost incurred by the CONSULTANT in performing the work to the date of termination, the amount of work originally required which would satisfactorily complete it to date of termination, whether that work is in a form or type which is usable to the CITY at the time of termination, the cost of the CITY of employing another firm to complete the work required, and the time which may be required to do so.

15. **Non-Discrimination.** The CONSULTANT agrees not to discriminate against any customer, employee or applicant for employment, subcontractor, supplier or materialman, because of race, creed, color, national origin, sex, religion, honorable discharged veteran or military status, familial status, sexual orientation, age, or the presence of any sensory, mental, or physical disability or the use of a trained dog or service animal by a person with a disability, except for a bona fide occupational qualification. The CONSULTANT understands that if it violates this provision, this Agreement may be terminated by the CITY and that the CONSULTANT may be barred from performing any services for the CITY now or in the future.

16. **Compliance and Governing Law.** The CONSULTANT shall at all times comply with all applicable federal, state, and local laws, rules, ordinances, and regulations. This Agreement shall be governed by and construed in accordance with the laws of the State of Washington.

17. **Subcontracting or Assignment.** The CONSULTANT may not assign or subcontract any portion of the services to be provided under this agreement without the express written consent of the CITY. Any sub-consultants approved by the CITY at the outset of this agreement are named on separate Exhibit attached hereto and incorporated herein by this reference as if set forth in full.

18. **Non-Waiver.** Payment for any part of the work or services by the CITY shall not constitute a waiver by the CITY of any remedies of any type it may have against the CONSULTANT for any breach of the agreement by the CONSULTANT, or for failure of the CONSULTANT to perform work required of it under the agreement by the CITY. Waiver of any right or entitlement under this agreement by the CITY shall not constitute waiver of any other right or entitlement.

19. **Litigation.** In the event that either party deems it necessary to institute legal action or proceedings to enforce any right or obligation under this agreement, the parties agree that such actions shall be initiated in the Superior Court of the State of Washington, in and for King County. The parties agree that all questions shall be resolved by application of Washington law and that parties to such actions shall have the right of appeal from such decisions of the Superior Court in accordance with the law of the State of Washington. The CONSULTANT hereby consents to the personal jurisdiction of the Superior Court of the State of Washington, in and for King County. The prevailing party in any such litigation shall be entitled to recover its costs, including reasonable attorney's fees, in addition to any other award.

20. **Taxes.** The CONSULTANT will be solely responsible for the payment of any and all applicable taxes related to the services provided under this agreement and if such taxes are required to be passed through to the CITY by law, the same shall be duly itemized on any billings submitted to the CITY by the CONSULTANT.

21. **City Business License.** The CONSULTANT has obtained, or agrees to obtain, a business license from the CITY prior to commencing to perform any services under this agreement. The CONSULTANT will maintain the business license in good standing throughout the term of this Agreement.

22. **Entire Agreement.** This agreement represents the entire integrated agreement between the CITY and the CONSULTANT, superseding all prior negotiations, representations or agreements, written or oral. This agreement may be modified, amended, or added to, only by written instrument properly signed by both parties hereto. These standard terms and conditions set forth above supersede any conflicting terms and conditions on any attached and incorporate exhibit. Where conflicting language exists, the CITY'S terms and conditions shall govern.

**page 8 – Consulting Services Agreement, Non-Public Work
City of Redmond, standard form**

**IN WITNESS WHEREOF, the parties hereto have executed this agreement as of the
day and year first above written.**

CONSULTANT:

CITY OF REDMOND:

By: _____
Title: _____

Angela Birney, Mayor
DATED: _____

ATTEST/AUTHENTICATED:

City Clerk, City of Redmond

APPROVED AS TO FORM:

Office of the City Attorney

RFP 10889-26

Procurement Process Improvement Consultant

Exhibit A – Scope of Work

City of Redmond's Finance Division seeks to engage with a consultant to review the City's purchasing and contracting policies and processes to make recommendations for best practices and ensuring our policies are effective and maximizing value for the City and taxpayers. The complete scope of work for consultant review includes existing policies and recommendations for additional policies, as described in the following sections. Existing policy documents are included as Attachments with this RFP.

Task 1: Policy Review and Comparative Analysis

The City's Purchasing, ProCard, and Travel Policies are due for updates to ensure compliance with state and federal laws, as well as best practices. The consultant will conduct a baseline analysis and policy review of the following areas: Purchasing Policy, ProCard Policy, and Travel Policy. Consultant will research and conduct a comparative analysis of peer cities.

1. Purchasing Policy

- A. Review Purchasing Policy and identify gaps
- B. Conduct comparative analysis with neighboring cities and GFOA best practices.
- C. Deliverable: Make recommendations for best practices, address areas of identified gaps
 - i. Primary areas to address:
 - a. Formal solicitation and bid process
 - b. Leasing and financing provisions and add policy
 - c. Bidding thresholds and signing limits
 - d. Sustainable purchasing options
 - e. Emergency Procurement for emergencies in the City of Redmond
 - f. RCW compliance matrix
 - g. OMWBE compliance

2. ProCard Policy

- A. Review ProCard Policy and identify gaps in usage, oversight, and reconciliation process.



B. Deliverable:

- i. Make recommendations for internal controls, spending limits, monitoring, best practices.
- ii. Identify gaps

C. Travel Policy

- i. Review city's travel policy for consistency with ProCard use and reimbursement controls.
- ii. Identify alignment opportunities between Travel and ProCard policies.
- iii. Deliverable:
 - a. Make recommendations for clarity, compliance, and administrative efficiency. best practices.
 - b. Identify gaps

D. Purchasing procedures and manual

- i. Review the operational procedures
- ii. Identify opportunities to standardize forms and templates
- iii. Deliverable:
 - a. Recommendations for streamlined procedures and workflow improvements

Task 2: CIP Contracting Process

CIP (Capital Improvement Projects) is a separate process that is led by the City's Public Works Construction Team. Finance owns the policy and both Public Works and Finance are responsible for ensuring compliance.

- A. Deliverable: Selected consultant will the review the CIP contracting process and make recommendations for best practices and suggested updates to the CIP contract process.

Task 3: BTIP Contract Process

BTIP (Business Technology Improvement Projects) is a separate process that is led by the City's Technology and Information Systems (TIS) Team. Finance owns the policy and both TIS and Finance are responsible for ensuring compliance.

- A. Deliverable: Selected consultant will the review the BTIP contracting process and make recommendations for best practices and suggested updates to the BTIP contract process.



Task 4: Contract Management Process Review

- A. Review the City's current contract management process and supporting tools, including Hummingbird (City's contract repository system)
- B. Deliverable: Recommendations for
 - i. Contract lifecycle management framework
 - ii. Roles, responsibilities, and approval workflows
 - iii. Vendor performance monitoring and contract renewal tracking

Task 5: Internal Controls and Risk Assessment

- A. The consultant will assess internal controls and risk exposure across the City's procure-to-pay process, from purchase initiation through vendor payment. This review will evaluate roles, approvals, documentation, and oversight to ensure appropriate separation of duties, accountability, and compliance with City policy and applicable state and federal requirements.
- B. Deliverable:
 - i. Identification of key control gaps
 - ii. Recommendations for segregation of duties, audit trail improvements, and policy alignment with state and federal requirements
 - iii. Risk mitigation strategies for purchasing activities occurring outside centralized procurement, sole source procurements, and emergency purchases

Task 6: Performance Measurement Framework

- A. Propose procurement-related performance measures and KPIs to monitor efficiency, compliance, and transparency. Align with Finance Department's performance measurement framework.
- B. Deliverable:
 - i. Recommended KPI set (e.g., procurement cycle time, competitive bid ratio, policy compliance rate, audit findings)

Task 7: Final Report and Recommendations

- A. A final report with all recommendations and analysis should be provided in a MS Word and PDF format.
- B. Deliverable:
 - i. Comprehensive report including:



- a. Summary
- b. Benchmark and peer analysis tables
- c. RCW Compliance Matrix
- d. Recommended policy revisions and sample language
- e. Implementation roadmap
- f. Suggested training outline
- g. Presentation to Leadership Team and City Council

Task 8: Project Management

The consultant will work in coordination with City staff to ensure project is executed in an integrated manner that utilizes time and resources efficiently. This will be accomplished by completing the following (at minimum):

- A. Kickoff meeting (Purchasing led)
- B. Bi-Weekly check-in meetings (virtual – Purchasing led)
- C. Core team coordination meetings (as needed)
- D. Assist with preparation for Leadership and Council briefings and presentations
- E. Maintain a project plan, issue/action log, and schedule updates



EXECUTIVE SUMMARY & OVERALL APPROACH

Executive Summary & Overall Approach

The methodology proposed for the City of Redmond centers on a comprehensive analysis and modernization of its procurement, ProCard, and travel functions through a four-stage process. The approach begins with project alignment and data collection, followed by a collaborative "Current State" assessment that utilizes Lean Six Sigma process mapping, staff interviews, and focus groups to identify operational bottlenecks and risk exposures. The third phase involves a deep-dive analysis of regulatory compliance (RCW), peer benchmarking against five neighboring municipalities, and specialized reviews of Capital Improvement and Business Technology workflows. Finally, the project concludes with the delivery of an actionable "toolkit" that includes a comprehensive report, ready-to-adopt policy language, and a phased implementation roadmap to ensure the City can efficiently transition from recommendations to practical application.

Contact Information: Jonathan Ingram, Vice President – Organizational Assessment
P: 513.221.0500 / E: jingram@raftelis.com



Who We Are

RAFTELIS: HELPING LOCAL GOVERNMENTS AND UTILITIES THRIVE.



Since our founding in 1993, local government and utility leaders have partnered with Raftelis to transform their organizations by enhancing performance, planning for the future, identifying top talent, improving their financial condition, and telling their story. We've helped more than 700 organizations in the last year alone. We provide trusted advice, and our experts include former municipal and utility leaders with decades of hands-on experience running successful organizations. People who lead local governments and utilities are innovators—constantly seeking ways to provide better service to the communities that rely on them. Raftelis provides management consulting expertise and insights that help bring about the change that our clients seek.

We believe that Raftelis is the *right fit* for this project. We provide several key factors that will benefit the City and help to make this project a success.

RESOURCES AND EXPERTISE: This project will require the resources necessary to effectively staff the project and the skillsets to complete all required components. With more than 190 consultants, Raftelis has one of the largest local government management and financial consulting practices in the nation. Our depth of resources will allow us to provide the City with the technical expertise necessary to meet your objectives. In addition to having many of the industry's leading management and financial consultants, we also have experts in key related areas, like stakeholder engagement and data analytics, to provide additional insights as needed.

DECADES OF COLLECTIVE EXPERIENCE: Our associates and subject matter experts have decades of experience strengthening local municipalities and nonprofit organizations. They've served in a wide range of positions, from city manager to public works director to fire chief.

PERSONAL SERVICE FROM SENIOR-LEVEL CONSULTANTS: You appreciate it when deadlines are met, phone calls are returned, and your challenges are given in-depth, out-of-the-box thinking. While other firms may assign your business to junior-level people, our approach provides exceptional service from senior-level consultants.

NICHE EXPERTISE: Our expertise lies in strengthening public-sector organizations. We're consulting specialists rather than generalists, focusing our strengths to do a highly effective job for a specific group of clients.

METHODOLOGY

Methodology

The City of Redmond is seeking a comprehensive analysis of its procurement function to ensure that its organizational structure, policies, and technology are all pulling in the same direction: toward the efficient and transparent delivery of services to the public. Specifically the City's Finance Division is looking to modernize its Purchasing, ProCard, and Travel policies, while ensuring full compliance with Washington State law (RCW) and best practices

Our team has extensive experience working with local government clients, including many in Washington and surrounding states. We understand the unique complexities of the Washington regulatory environment and the importance of balancing administrative efficiency with rigorous internal controls. Our role is to help Redmond scale its efforts, fill gaps in current policies, and optimize the workflows for specialized areas like Capital Improvement Projects (CIP) and Business Technology Improvement Projects (BTIP).

THE FOLLOWING DETAILS THE PROPOSED WORK PLAN FOR THE CITY.

Activity 1: Project Alignment and Information Gathering

Project Kick-Off Meeting and Governance Alignment

We will conduct a virtual kick-off meeting with the City's project team to finalize the project schedule and stakeholder list. The meeting will provide an opportunity to discuss the City's specific goals, confirming the primary areas for policy updates, and desired level and type of stakeholder engagement.

Engage Purchasing Staff

To begin to engage them in the process, Raftelis will also hold a virtual meeting with the staff who manage the City's procurement function as a group to review the project schedule, work plan, and process steps.



Regular Progress Meetings

To ensure the project remains on track and highly integrated with City staff, Raftelis will facilitate regular check-in meetings for the duration of the project. These meetings will serve to review project progress, address immediate issues, and coordinate data needs.

Gather and Review Information

Raftelis will coordinate with designated City staff to initiate the collection of key data and documentation. We will perform a deep-dive review of the current operating environment, including the City's current Purchasing, ProCard, and Travel policies and procedure manuals, any recent audit findings, current workflows, available workload data, and relevant RCW sections.

Meetings: • Virtual kick-off meeting with the City project team • Virtual meeting with procurement staff • Regular virtual status meetings	Deliverables: • Confirmed project work plan and schedule • Detailed data request
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Activity 2: Understand the Context and Internal Controls

Our approach is grounded in the philosophy that “those who do the work, know the work.” To fully understand the City’s purchasing function, our project team will visit the City to engage with procurement staff and customer departments. In this phase, we also incorporate a specific focus on Redmond’s internal control environment and risk exposure.

Individual Staff Interviews

Our team will individually and confidentially interview City leadership as well as key staff across Finance and Purchasing. During these interviews, we will discuss their responsibilities, business processes, resources, current use of technology, and perceptions of strengths and challenges associated the City’s approach to procurement.

Internal Customer Focus Groups

We will schedule and conduct targeted focus groups with a cross-section of internal procurement customers, including representatives from the Public Works Construction Team and the Technology and Information Services Team. Discussions during these focus groups will include staff perceptions and experiences with purchasing workflows, with a focus on identifying friction points and their operational impacts.



Current State Process Mapping Workshop

Leveraging our team’s Lean Six Sigma expertise, we will facilitate a half-day onsite process mapping workshop with staff from both the purchasing team and customer departments. During this workshop, staff will work together to physically map out the current procurement process from start to finish, identifying non-value added activities, redundancies, and bottlenecks.

Issue Summary and Validation

Following completion of the staff and stakeholder engagement and on-site workshop, Raftelis will synthesize qualitative findings gained from these activities. These engagement insights will be synthesized into an Overall Issue Summary presentation, designed to support structured discussion and validation with City staff prior to advancing to detailed research, analysis and benchmarking activities. Raftelis will present the Issue Summary virtually to the City project team.

Meetings: • Confidential interviews with City leadership and Finance and Procurement Division staff (two on-site days) • Targeted focus groups with internal and external customers (one on-site day) • Current state process mapping workshop (half-day)	Deliverables: • Overall Issue Summary PowerPoint presentation
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Activity 3: Comprehensive Policy, Process, and Contract Management Analysis

This activity combines the review of regulatory compliance, specialized departmental workflows, and the existing contract management infrastructure into a single, integrated analysis phase.

Regulatory and Best Practice Review

We will perform a rigorous review of the city’s purchasing, ProCard, and travel policies against Washington State RCWs and GFOA best practices. Specifically, we will address leasing/financing provisions, emergency procurement protocols, signing limits, social equity goals, and sustainable purchasing practices.

Specialized Process Review (CIP and BTIP)

We will conduct a focused review of the distinct processes for Capital Improvement Project contracting (led by Public Works) and Business Technology Improvement Projects (led by Technology and Information Services). We will develop recommendations to ensure these specialized tracks are efficient, while remaining compliant with overarching Finance policies.

Contract Lifecycle and Hummingbird Review

We will assess the effectiveness s of the Hummingbird (eDocs) repository in supporting the current contract lifecycle. In addition, we will review current roles, responsibilities, and workflows for contract renewals and vendor performance monitoring.

Peer Benchmarking

Raftelis will select up to five (5) neighboring municipalities to compare Redmond’s approach. This study will provide a data-driven baseline for operational considerations such as signing thresholds, staffing levels, and RCW compliance strategies.

Purchasing Procedures and Manual Review

We will review the City’s operational procedures to identify opportunities to standardize forms and templates. Our goal is to provide recommendations for streamlined procedures and workflow improvements that can be memorialized in an updated Purchasing Manual.

Preliminary Findings and Recommendations

At this point in the project, our project team will have conducted stakeholder engagement, process mapping, and detailed research and analysis in order to identify potential opportunities for the City to promote a more efficient and effective procurement approach. Our team will conduct a virtual meeting to review our preliminary findings and recommendations with the City. These will be designed to optimize the City’s approach to purchasing while maintaining strong internal controls.

Meetings: Meeting with City project team to review preliminary analysis (virtual)	Deliverables: Preliminary Findings and Recommendations PowerPoint presentation
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Activity 4: Prepare Project Deliverables

The final phase of our engagement is focused on turning analysis into action. We understand that a report is only valuable if it is practical and easy to implement. Our goal is to synthesize the data gathered in the previous stages into a cohesive “toolkit” the City can use immediately to modernize its procurement function, ensure compliance, and track success over time.

Comprehensive Project Report

We will prepare a detailed project report that documents our methodology and findings for the entire project. This report will serve as a comprehensive record of the project, including current and recommended future state process maps, an RCW compliance matrix, benchmarking analysis, and our full set of recommendations for the purchasing, ProCard, and travel policies. This report will also include a set of recommended Key Performance Indicators (KPIs) that can be used by the City to track ongoing progress.

Ready-to-Adopt Policy Language

To help the City move quickly from recommendation to adoption, we will provide specific sample language for all proposed policy revisions. This includes new sections for areas like leasing/financing, sustainable purchasing, and emergency procurement, formatted so they can be easily integrated into Redmond’s existing documents.

Phased Implementation Roadmap

We will develop a sequenced roadmap that categorizes recommendations into “Quick Wins” (immediate adjustments to thresholds or workflows) and “Strategic Initiatives” (long-term changes to contracting processes or organizational structure). This ensures the City can manage the pace of change effectively.

Suggested Training Outline

To ensure staff across all departments understand the “why” and “how” of new processes, we will provide a training outline. This document will summarize key changes and provide a roadmap for the City to use when educating employees on the updated purchasing manual and internal controls.

Presentation to the City

Our team will present the draft comprehensive summary report to the City’s project team for review and discussion. We request that the City provide one consolidated list of comments within 30 days of receipt of the draft report. Raftelis will then prepare the final project report based on consolidated comments from the City. We will be prepared to make one virtual or in-person presentation of the final report to City leadership on the recommended path forward, ensuring buy-in at the highest levels of the organization.

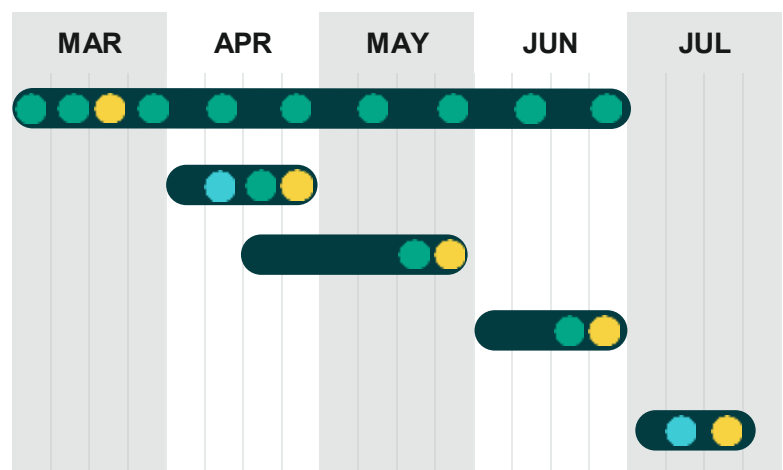
- Virtual meeting to discuss draft deliverables
- Formal presentation of final project report and to City leadership

- Draft and final comprehensive summary report
- Recommended policy revisions and sample language
- Phased implementation roadmap
- Suggested training outline
- Phased implementation roadmap

As an optional activity, Raftelis recommends conducting a Change Management and Implementation Planning Workshop, designed to bridge the critical gap between recommendations and execution. Under this optional service, Raftelis would facilitate an in-person, structured workshop with staff from the procurement team and customer departments. The workshop would build directly on the draft implementation roadmap developed as part of the assessment, and would focus on prioritizing recommendations based on impact, feasibility, and organizational capacity, and defining clear implementation steps, roles, and ownership. This facilitated process is designed to ensure that recommended changes are not viewed as standalone activities, but are integrated into the City's broader operational, financial, and strategic planning efforts.

Project Schedule

-  *In-Person Meetings*
-  *Web Meetings*
-  *Deliverables*



COST

Cost

The total fixed fee to complete the scope of work in Activities 1-4 as outlined in this proposal is \$74,950, which includes all professional fees and expenses, including travel for Raftelis.

A breakdown of costs by project activity is provided in the table below.

Activity	Description	Cost
1	Project Alignment and Information Gathering	\$11,900
2	Understand the Context and Internal Control	\$24,600
3	Comprehensive Policy, Process, and Contract Management Analysis	\$22,650
4	Prepare Project Deliverables	\$15,800
BASE TOTAL		\$74,950
Optional – Change Management and Implementation Planning Workshop		\$15,000
TOTAL WITH OPTION		\$89,950

Hourly rates and estimated hours by team member are provided below.

Classification	Team Member	Hourly Rate	Estimated Project Hours
Vice President	Ingram	\$375	8
Senior Manager	Teal	\$340	94
Senior Consultant	Flick	\$260	80
Consultant	Englot	\$230	118

It is our practice to invoice clients for monthly progress payments based upon work completed.

QUALIFICATIONS AND PROJECT LEAD & TEAM

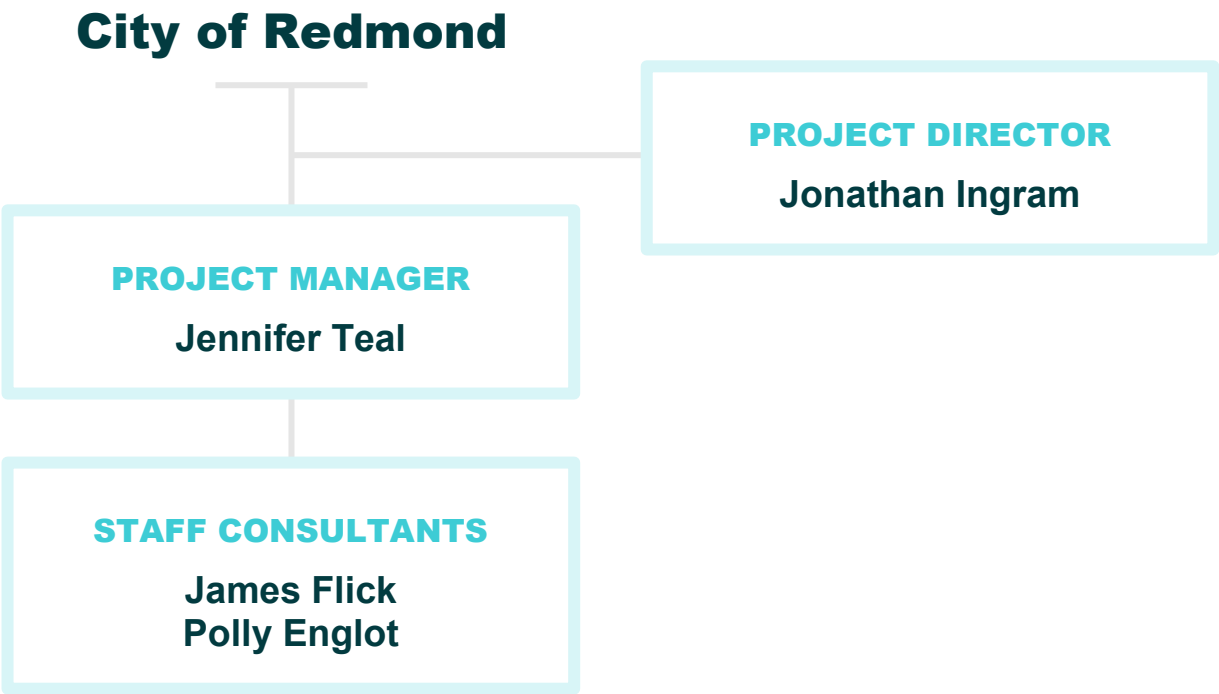
Qualifications and Project Lead & Team

WE HAVE DEVELOPED A TEAM OF CONSULTANTS WHO SPECIALIZE IN THE SPECIFIC ELEMENTS THAT WILL BE CRITICAL TO THE SUCCESS OF THE CITY’S PROJECT.

Our project team is made up of senior-level consultants with direct local government experience. What sets our project team apart is our ability to explore and relate to local community values while at the same time investigating realistic approaches for cost-effective solutions.

Because we possess the in-house knowledge and experience necessary for this work, no subconsultants will be used. All team members are Raftelis employees.

An organizational chart of our project team is as follows. Resumes for each team member are provided in the Appendix.



REFERENCES

References

RAFTELIS HAS THE MOST EXPERIENCED PUBLIC UTILITY FINANCIAL AND MANAGEMENT CONSULTING PRACTICE IN THE NATION.

Our staff has assisted more than 1,700 local government agencies and utilities across the U.S., including some of the largest and most complex agencies in the nation. In the past year alone, Raftelis worked on more than 1,300 financial, organizational, and/or technology consulting projects for over 700 agencies in 47 states, the District of Columbia, and Canada. Raftelis has assisted hundreds of local governments across the country. In many instances, we have worked with organizations over multiple years and established long-term partnerships to build capacity and lasting improvements throughout an organization. We have become trusted advisors to these local governments, as outlined in the following references.

Collier County FL

Reference: Ed Finn, Deputy County Manager
P: 239.252.8383 / E: ed.finn@colliercountyfl.gov

Collier County, Florida (County) engaged Raftelis in August 2024 to review the County's procurement process and identify areas for improved efficiency and effectiveness. This included a review of current practices against industry standards from organizations such as the Institute for Public Procurement (NIGP) and the Government Finance Officers Association (GFOA), as well as a benchmarking comparison with other local government organizations in Florida. To conduct this work, the project team completed interviews with 34 County staff, including staff from the Procurement Services Division (Division) as well as customers and stakeholders of the process. The project team also analyzed data provided by the County and collected benchmark data from eight peer organizations. The resulting report included recommendations to improve policy and process, employee training and development, and customer and stakeholder engagement.

City of Charleston SC

Reference: Hampton Logan, Special Projects Manager to the Mayor
P: 843.513.9572 / E: loganh@charleston-sc.gov

The City of Charleston (City) engaged Raftelis under a multi-year contract to conduct a comprehensive series of organizational, structural, and service delivery assessments across the City's operations. Over the course of this engagement, Raftelis has completed more than 40 individual assessments and analytical efforts, working in close partnership with the City's Process and Service Improvement Department and internal efficiency experts.

In addition, Raftelis conducted detailed organizational assessments of key services areas, including the City's procurement function in 2019. This project included a review of the City's procurement policy and procedures informed by best practices and benchmarking data and provided recommendations for modifying the City's procurement policy to streamline City processes while still providing appropriate oversight by staff and elected officials. Our team continues to support the City with various projects.

City of Milton WA

Reference: Shanna Styron Sherrell, Mayor

P: 253.922.8733 x2705 / E: sstyronsherrell@cityofmilton.net

In 2023 the firm was engaged by the City of Milton (City) to perform an organizational assessment of its finance department with a goal to review structure, staffing levels, and processes. Work included interviews with all Finance staff, a review of data and documents, and comparisons against best industry practices. Report recommendations included adding an administrative staff member for city hall front desk functions, improving performance management, enhancing department teambuilding, physical space improvements, and more.

City of Richmond CA

Reference: Nickie Mastay, Deputy City Manager

P: 510.620.6609 / E: nickie_mastay@ci.richmond.ca.us

In 2023, the City of Richmond (City) engaged the firm to perform a Citywide staffing analysis. Richmond, located in the Bay Area northeast of San Francisco, is a City of 120,000 with over 700 authorized staff positions. Our team conducted interviews across all departments, including Executive and Internal Services, including Finance, Public Works, Community Development, Community Services, Economic Development, Police, and Fire. We presented our observations and recommendations to the City Council, which included specific staffing and operating efficiency recommendations across all operating departments.

City of Moorpark CA

Reference: Hiromi Dever, Finance Director

P: 805.517.6271 / E: hdever@moorparkca.gov

In 2024 the City of Moorpark (City) engaged the firm to provide an assessment of its Finance Department operations and interim finance director assistance while the position was vacant. Work included interviews with all Finance staff members and other key internal City stakeholders, a review of internal data and documents, comparisons against other similar municipalities, and preparation of a memo with findings and recommendations for improvement. In addition, our consultant assisted in preparation of numerous Citywide policies, including revisions to the procurement and travel policies.

City of Laguna Beach CA

Reference: David Kiff, City Manager

P: 949.497.0704 / E: dkiff@lagunabeachcity.net

In 2024, the City of Laguna Beach (City) engaged Raftelis to provide a comprehensive assessment of its Finance Department, including process integrations with the City Treasurer. The Department had experienced significant staff turnover, the implementation of a new financial system, and performance concerns in recent years. Project work included interviews with staff and other City departments, a review of audit findings and City documents, and a comparison of GFOA and GASB best practices. The resulting project report addressed structure, staffing levels, performance measures, and improvements to internal controls and processes to serve as a Roadmap for the Department moving forward.

City of Victorville CA

Reference: Keith Metzler, City Manager

P: 760.955.5029 / E: kmetzler@victorvilleca.gov

In late 2023, the City of Victorville (City) engaged Raftelis perform an assessment of the Department to serve as a roadmap going forward for its new Finance Director. Raftelis interviewed key staff in each division, reviewed a wide variety of documents, performed a benchmarking comparison with other California peer cities, and identified best practices for adoption in Victorville. The resulting report included recommendations to strengthen written policies and procedures to mitigate the impacts of turnover, add staff in the Accounting function, and streamline the purchasing process with online capabilities, among others.

CLIENT LIST

Client List

As a firm, Raftelis serves hundreds of clients each year across our 14 offices nationwide. Below is a list of just the clients active in Washington and Oregon at the time of this proposal. An exhaustive list of all clients can be provided upon request.

- Albany, City of (OR)
- Beaverton, City of (OR)
- Bellevue, City of (WA)
- Bothell, City of (WA)
- Clean Water Services (OR)
- Coos Bay, City of (OR)
- Des Moines, City of (WA)
- Gresham, City of (OR)
- Hillsboro, City of (OR)
- Issaquah, City of (WA)
- King County (WA)
- King County Dept. of Natural Resources & Parks (WA)
- Lane County (OR)
- LOTT Clean Water Alliance (WA)
- McMinnville, City of (OR)
- Metro (OR)
- Newport, City of (OR)
- Orting, City of (WA)
- Portland, City of (OR)
- Seattle Public Utilities (WA)
- Snohomish, City of (WA)
- Southwest Suburban Sewer District (WA)
- Tacoma - Public Works, City of (WA)
- TMF Expansion Project Company, LLC
- Washington County (OR)
- Westport Sewer District (OR)
- Worksystems Inc (OR)

WORK SAMPLES

Work Samples

A copy of our work performing an assessment of the Collier County, Florida procurement process can be found here: [Collier County Procurement Process Review](#).

BUSINESS NAME

Business Name

Official name of business: Raftelis Financial Consultants, Inc. (DBA Raftelis)

Official business address: 227 W. Trade Street, Suite 1400, Charlotte, NC 28202

Date and place of incorporation: Raftelis is a subchapter S-Corporation incorporated in the state of North Carolina on April 23, 2004. The cover letter has been signed by a person duly authorized to legally bind the corporation.

BUSINESS LICENSE

Business License

Raftelis understands and agrees to obtain a City of Redmond business license as a requirement for performing these services.

APPENDIX: RESUMES

Appendix: Resumes



Jonathan Ingram

PROJECT DIRECTOR Vice President

ROLE

Jonathan will be responsible for overall project accountability and will be available to provide quality assurance and control, industry perspective, and insights into the project.

PROFILE

Jonathan is a nationally recognized executive consultant with over 20 years of leadership experience advancing performance, efficiency, and resilience in local government and utility service delivery. As the leader of Raftelis' Local Government Organizational Assessment Practice, he directs enterprise-level consulting engagements that help cities, counties, and public utilities across the country navigate complex operational and financial challenges to achieve long-term success.

With a unique blend of direct public sector experience and high-impact management consulting experience, Jonathan brings deep expertise across the full spectrum of municipal and utility functions—including public safety, public works, asset management, parks and recreation, finance, community development, internal services, and utility service delivery. He has successfully led transformative initiatives for over 1,000 local governments and utilities, delivering measurable results through operational reviews, staffing and deployment planning, departmental restructuring, performance management, intergovernmental collaboration, and strategic planning.

A cornerstone of Jonathan's approach is his ability to align operations and service delivery outcomes with organizational strategy and fiscal realities. He has extensive experience supporting fiscally distressed communities, developing long-term financial plans that connect operational needs—such as staffing, capital investment, and technology—with financial constraints and service level expectations. His strategies are tailored to maximize impact, attain organizational health, and ensure reliable service delivery to the public.

Jonathan has also developed and refined Raftelis' proprietary methodologies for workforce and resource planning, emphasizing employee engagement, data-driven workload analysis, and best practice alignment. These approaches yield realistic, aspirational, and implementable plans for departments seeking to modernize service delivery and improve internal performance.

His core areas of expertise include:

- **Comprehensive Operations Reviews** across police, fire, EMS, development services, public works, and administrative departments



Specialties

- Staffing and operations assessment
- Public safety staffing and operations
- Financial management and planning
- Process improvement

Professional History

- Raftelis: Vice President (2024-present); Senior Manager (2021-2023); Manager (2020-2021); Senior Associate, The Novak Consulting Group (2012-2020)
- City of Cincinnati, Ohio: Budget Manager (2010-2012)
- Management Partners: Senior Management Advisor (2005-2010)

Education

- Master of Public Administration - Northern Illinois University (2005)
- Bachelor of Arts in Political Science - Aurora University (2003)

Professional Memberships

- International City/County Management Association (ICMA)
- Ohio City/County Management Association (OCMA)

- **Public Safety Staffing and Deployment** strategies informed by workload analysis and service demand
- **Custom Performance Management Systems** designed to build accountability and support continuous improvement
- **Process Optimization and Service Delivery Innovation**, with emphasis on regulatory compliance, customer service, and interdepartmental collaboration
- **Strategic Financial Planning** that translates operational needs into fiscally sound, multi-year implementation strategies
- **Employee and Community Engagement**, including facilitation of workshops and stakeholder engagement initiatives
- **Intergovernmental Collaboration and Consolidation**, enabling shared services and cross-jurisdictional coordination

Jonathan is also a recognized thought leader in public safety operations and analytics. He co-authored the ICMA-published article *“Policing Parameters: How Gilroy, California Met New Workload Demands,”* showcasing his ability to apply data-driven methods to real-world operational challenges. He collaborates with subject matter experts to deliver integrated recommendations that balance technical rigor with organizational and political realities.

He holds a Master of Public Administration from Northern Illinois University and a Bachelor’s degree in Political Science from Aurora University. Jonathan is an active member of the International City/County Management Association (ICMA) and the Ohio City/County Management Association (OCMA).

Jennifer Teal

PROJECT MANAGER

Senior Manager

ROLE

Jennifer will manage the day-to-day aspects of the project ensuring it is within budget, on schedule, and effectively meets the City's objectives. She will work closely with the City to develop a staff and stakeholder engagement strategy and will lead the facilitation of process mapping exercises and stakeholder focus groups. Jennifer will lead the consulting staff in developing conducting analyses and preparing deliverables for the project and will serve as the City's main point of contact for the project.

PROFILE

Jennifer began consulting in 2017 after nearly 20 years of public sector experience, including 10 years of leadership experience in local government. Most recently, Jennifer served the City of Gahanna, Ohio where she worked as the deputy finance director, chief financial officer, and finally, city administrator. In her finance roles, Jennifer was instrumental in guiding the City out of the recession while strengthening its financial position and management strategies. Jennifer led the City through a bond rating increase, multiple debt issuances, the development of key financial policies, and multiple rounds of union negotiations with utility and public safety bargaining units. Working with the elected leadership, Jennifer transformed the City's budget and financial reporting processes to align with best practices and Government Finance Officers Association award standards, developed the community's first Citywide strategic plan, and led an in-house process improvement and innovation team.

As a consultant, Jennifer has worked on more than 125 projects across 27 states. She is a skilled facilitator, trainer, and problem solver, and a Certified Lean Six Sigma Black Belt. Jennifer's commitment to empowering others in the public sector has led to the development of the Raftelis Performance Academy (RPA), the only leadership development, performance improvement, and innovation training program in the country designed to meet the unique needs of local governments and utilities. Through the RPA, Jennifer has designed curricula and programs serving hundreds of utility and local government employees and supported the development of in-house innovation and leadership development programs in several organizations. In addition to this work, Jennifer works with local governments and utilities



Professional History

- Raftelis: Senior Manager (2025-present); Manager (2022-2024) Senior Consultant (2020-2022); Associate, The Novak Consulting Group (2019-2020)
- The Ohio State University: Lecturer (2019-2025)
- J Teal Consulting: Principal Consultant (2017-2019)
- City of Gahanna, Ohio: City Administrator (2016-2017), Chief Financial Officer (2011-2015), Deputy Finance Director (2009-2011)
- City of Colorado Springs, Colorado -Stormwater Enterprise: Business Administrator (2007-2009)
- Missile Defense Agency: Financial Manager (2006-2007)
- Department of Homeland Security: Budget Analyst (2003-2006)

Education

- Master of Public Administration - George Mason University (2003)
- Bachelor of Arts in Urban Planning and Public Administration - Miami University (2000)

Certifications

- Lean Six Sigma Black Belt Certification
- Everything DiSC® Certification

Professional Memberships

- International City/County Managers Association (ICMA)
- Ohio City/County Management Association (OCMA)
- Engaging Local Government Leaders (ELGL)
- Water Environment Federation (WEF)

across the country to develop impactful strategic plans, and conduct assessments of organizational culture and operations.

Jennifer is active in the local government and utility industries and has presented at several conferences on topics related to strategic planning and workforce development. She has recently co-authored articles that have appeared in the *Journal of Public Integrity* and *Water and Environment Technologies*. She is a frequent lecturer at the Ohio State University John Glenn College of Public Affairs, where she has taught graduate and undergraduate seminars in Local Government Administration.

Jennifer has led or participated in numerous local government and utility strategic planning, organizational development, and operations assessment engagements, including those outlined below:

- City of Charleston (SC) – Departmental Performance Assessments and BRIDGE Academy Program Development
- City of Pompano Beach (FL) - Process Improvement and Innovation Program Development and
- Greater Cincinnati Water Works (OH) – Strategic Business Plan Development
- Sacramento Regional Water Authority (CA) – Transformative Utility Leaders Training Program
- Fairfax Water (VA) – Human Resources Organizational Assessment
- WaterOne (KS) – Coaching and Facilitation Support
- City of Columbus Department of Public Utilities (OH) – Strategic Plan and Organizational Review
- Johnson City Water and Sewer Department (TN) – Process Improvement and Innovation Training Program
- Widefield Water and Sanitation District (CO) – Outstanding Customer Service Training Program
- Louisville Water Company (KY) – Operations Facility Design Guidelines
- City of Baltimore Department of Public Works (MD) – Strategic Plan and Implementation Support
- Virginia Chapter of the American Water Works Association (VA) – Customer Service Excellence Training Program
- Association of State Drinking Water Administrators (VA) – Effective Performance Improvement Training Program
- City of Raleigh (NC) – HR Services Assessment
- City of Wauwatosa (WI) – American Rescue Plan Act (ARPA) Community Engagement and Project Prioritization
- City of Long Beach (CA) – Development Services Department Strategic Plan and Implementation Support
- City of Asheville (NC) – Human Resources Organization Analysis
- Canton Township (MI) – Township-wide Organizational Assessment
- City of Sugar Land (TX) – Internal Change Strategy Development
- City of Watertown (MA) – Municipal Personnel Department Assessment
- City of Temple (TX) – Strategic Planning Facilitation
- Talbot County (MD) – Planning and Zoning Department Strategic Plan
- Beaverton (OR) – Process Improvement and Innovation Program Development and Site Development, Construction, and Close Out Process Review
- City of San Diego (CA) – Development Services Department Operations and Organizational Assessment
- City of Austin (TX) – Human Resources Department Operational Efficiency Assessment
- City of Cedar Falls (IA) – Strategic Plan Development
- City of Bloomington (IN) – City-wide Organizational Assessments

- Guilford County (NC) – Human Resources Organizational Assessment
- Franklin County (OH) – Transfer and Conveyance Process Review
- City of Rockville (MD) – Performance Measurement Program Development
- City of Piqua (OH) – Strategic Plan Development
- City of Morgantown (WV) – Strategic Plan Development and Implementation Support
- Hamilton County (OH) – Human Resources Assessment
- City of Fullerton (CA) – Human Resources and Administrative Services Assessment
- City of Owensboro (KY) – Finance and Internal Services Department Organization Assessment
- City of Oklahoma City (OK) – Private Development Process Improvement

James Flick

STAFF CONSULTANT

Senior Consultant

ROLE

James will work at the direction of Jennifer in conducting interviews, directing research and analysis, preparing recommendations, and drafting deliverables.

PROFILE

James has over 14 years of organizational leadership experience, including six years in local government. Most recently, James served as the Director of Economic Development and Public Information Officer for Deerfield Township in Warren County, Ohio. Previously, he was a Development Officer and oversaw the Policy and Communication Division for the Department of Community and Economic Development at the City of Cincinnati.

James' areas of expertise include economic development, project management, and performance measurement. In addition, he is a skilled communicator, analyst, and creative problem solver.

During his tenure at Deerfield Township, James worked closely with entrepreneurs looking to start a business, assisted existing companies with relocations and expansions, and managed development projects of varying scales. He also served on the Executive Board of the Warren County Small Business Development Alliance.

At the City of Cincinnati, James supported business attraction initiatives and evaluated commercial development opportunities in the Central Business District. He was also instrumental in developing policies, programs, and strategic plans to address smart city initiatives, small business growth, retail revitalization in the urban core, and foreign direct investment.

James has presented at several state and regional conferences on smart cities, data and demographics, and economic development's relationship to parks. He is also an Adjunct Instructor for the Northern Kentucky University Master of Public Administration program, where he teaches Community Development, Public Policy, and Budgeting.

James earned a bachelor's degree in political science from Eastern Michigan University and a master's degree in public administration from Northern Kentucky University.



Specialties

- Organizational assessment
- Strategic Planning

Professional History

- Raftelis: Senior Consultant (2021-present)
- Northern Kentucky University: Adjunct Instructor (2017-2021)
- Deerfield Township, Ohio: Economic Development Director/Public Information Officer (2018-2021)
- City of Cincinnati: Development Officer /Interim Division Manager, Policy and Communication (2016-2018)
- Cushman and Wakefield: Vice President of Research and Marketing (2010-2016)

Education

- Master of Public Administration – Northern Kentucky University (2010)
- Bachelor of Arts in Political Science – Eastern Michigan University (2006)

Certifications

- Economic Development Finance Professional Certification (Grow American formerly NDC)

Professional Memberships

- International City/County Management Association (ICMA)
- American Society for Public Administration (ASPA)

Polly Englot

STAFF CONSULTANT

Consultant

ROLE

Polly will work at the direction of Jennifer in conducting interviews, directing research and analysis, preparing recommendations, and drafting deliverables.

PROFILE

Polly has robust analytical experience throughout the public sector, having worked in local government, nonprofit, and international development settings. She is proficient in the areas of budget planning and analysis, process improvement, and project management. Polly is a detail-oriented problem solver who leverages data and organizational analysis to identify trends and actionable solutions.

Prior to joining Raftelis, Polly worked in Broward County's Office of Management and Budget in southern Florida. She supported monitoring and development of over \$100-million-dollar annual operating budgets for judicial offices and the county's extensive environmental agency. This work included forecasting for a dozen special revenue funds, monitoring state and federal grants, assessing payroll and benefit costs for over 500 employees, and evaluating new staffing and capital project requests.

Throughout her academic studies, Polly developed highly functional skills in GIS analysis, data visualization and communication, evaluation design, and public budgeting. She strengthened these skills in the classroom by learning from her prior tenure at Food Bank for New York City, where she supported planning and content development for over 90 marketing campaigns and events annually. In addition, she collaborated with stakeholders and donors at all levels to raise awareness, fundraise, and support the Food Bank's clients. Polly began her career in program operations supporting international public health programs based in West Africa, funded by major public and private grantors.

Polly earned a master's degree in public policy from Duke University's Sanford School of Public Policy and a bachelor's degree in geography, with minors in Arabic and French, from Bucknell University in Pennsylvania.



Specialties

- Municipal budget development
- Project management
- Organizational assessment
- Process improvement
- Event planning and facilitation
- Forecasting
- Data analysis

Professional History

- Raftelis: Consultant (2026-present); Associate Consultant (2024-2025)
- Broward County: Budget and Management Analyst (2022-2023)
- Food Bank for New York City: Marketing and Events Coordinator (2018-2020)
- Population Services International: Program Coordinator (2016-2018)

Education

- Master of Public Policy - Duke University, Sanford School of Public Policy (2022)
- Bachelor of Arts in Geography, minors in Arabic and French - Bucknell University (2016)