



perspective  
**GAINED**

PROPOSAL FOR  
City of Port St. Lucie, FL  
TO PROVIDE A  
Study of Commercial and Residential Fees  
for the Public Works Department

**BerryDunn**

100 Middle Street, Portland, ME  
04101  
207-541-2200

**Chad Snow, Principal**

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

**Fred Turnier, Project Manager**

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

**Proposal Submitted On:**

May 16, 2019 before 2:00 p.m. in  
response to RFQu #20190061

May 16, 2019

June Raymond  
Procurement Management Department  
121 S.W. Port St. Lucie Boulevard  
Port St. Lucie, FL 34984-5009

Dear Ms. Raymond,

BerryDunn McNeil & Parker, LLC (BerryDunn) is pleased to submit this proposal in response to the City of Port St. Lucie's (City's) Request for Qualifications (RFQu) #20190061 for a Professional Consultant for a Study of Commercial and Residential Fees for the Public Works Department. We have read the RFQu, understand its contents, and agree to the terms and conditions therein. Our proposal is a firm and irrevocable offer valid for 90 days from the proposal due date of May 16, 2019.

BerryDunn is an independent management and information technology (IT) consulting and certified public accounting firm headquartered in Maine and serving clients nationally. We are a stable and well-established firm that has preserved our core values and reputation for excellence for 45 years. We have enjoyed steady growth by providing consistent, high-quality services to our clients in all 50 states and in Canada.

We have thoughtfully augmented our team with the specialized expertise of our subcontractor, Illinois-based Fiscal Choice Consulting, LLC (Fiscal Choice). Fiscal Choice works nationally with cities, counties, and state governments of all sizes on rate setting, user fee, cost allocation, and operational improvement studies. The combined experience of Fiscal Choice's two partners, both of whom are proposed for the City's project, features hundreds of similar studies. Their recent experience includes fee studies for some of the largest and fastest growing local governments in the country.

As a principal in our Local Government Practice Area, I am authorized to bind BerryDunn to the commitments made herein. Should you have any questions regarding our proposal or updates on the evaluation process, my contact information is as follows:

Chad Snow, Principal  
100 Middle Street  
Portland, ME 04101  
207-541-2294  
[csnow@berrydunn.com](mailto:csnow@berrydunn.com)

We appreciate the opportunity to submit this proposal and look forward to working with City on this important initiative.

Sincerely,



Chad Snow  
Principal

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**RFQu Reply Sheet**  
**Study of Commercial and Residential Fees for the Public Works Department # 20190061**

**1. ORGANIZATIONAL PROFILE- COMPANY NAME:** Berry Dunn McNeil & Parker, LLC

PHYSICAL ADDRESS: 100 Middle Street; Portland, ME 04101

MAILING ADDRESS: 100 Middle Street; Portland, ME 04101

TELEPHONE NUMBER: (207) 541-2294

FAX NO. (207) 774-2375

CONTACT PERSON Chad Snow

E-MAIL : csnow@berrydunn.com

Is the firm incorporated? Yes--No If yes, in what state? Provide a list of officers for this entity.

Yes, we are incorporated in the State of Maine. Please see attach listing of officers.

**2. PROPOSAL RESPONSE- Please attach responses to the following:**

**2.1.** Please provide an Executive Summary.

**2.2.** Provide a listing of firm's current contracts.

**2.3.** What is your proposed Management Plan for this project?

**2.4.** What is your proposed Work Plan for this project?

**2.5.** Making adjustment for issues that may arise during this project, what is your proposed Schedule for this project?

**2.6.** Does the firm recommend any optional value-added services to this project?

**2.7.** Has the Proposer or any of its principals ever been declared bankrupt or reorganized under Chapter 11 or put into receivership?

**2.8.** List any lawsuits pending or completed within the past five (5) years involving the corporation, partnership or individuals with more than ten percent (10%) interest: (N/A is not an acceptable answer).

**2.9.** List any judgements from lawsuits in the last five (5) years: (N/A is not an acceptable answer).

**2.10.** List any criminal violations and/or convictions of the Proposer and/or any of its principals: (N/A is not an acceptable answer).

**2.11.** Please provide firm's financial disclosure documents as described in section 8 of this document.

**2.12.** Is your firm claiming, "Local Preference"? If so, please provide documentation as described in section 8 of this document.

**2.13.** Does your firm hold a Minority Business Certification as described in section 8 of this document? If so, please attach.

**2.14.** Using the reference form below please provide three (3) references for projects within the last three (3) years similar in scope to the services described in this RFQu.

**3. VENDOR'S LIST** - If your company offers commodities other than the one (1) specified for this bid, and you wish to be put on the vendor's list, please contact Onvia.com at (800) 711-1712. Bid Tabulation Reports are advertised on the City's Web Site at [www.cityofpsl.com](http://www.cityofpsl.com).

**4. INSURANCE CERTIFICATES LICENSE** - Proposers are required, to submit a copy of their Insurance Certificate for the type and dollar amount of insurance they currently maintain. Proposers are required to submit all licenses and certifications required to perform this project.

**5. COMPLETION OF FORM** - An authorized representative of the firm offering this RFQu must complete this form in its entirety. Terms entered herein shall not be subject to withdrawal or escalation by Proposer. The City reserves the right to hold proposals and bid guarantees for a period not to exceed one hundred twenty (120) calendar days after the date of the bid opening stated in the Invitation to Bid before awarding the Contract. Contract award constitutes the date that City Council executes the motion to award the bid.

- 6. **CONTRACT** - Proposer agrees to comply with all requirements stated in the specifications for this RFQu.
- 7. **ADDENDUM ACKNOWLEDGMENT** - Proposer acknowledges that the following addenda have been received and are included in its proposal:

Addendum Number	date Issued
1	5/8/19
2	5/16/19

**CERTIFICATION:**

This RFQu is submitted by: Name (print) Charles Snow who is an officer of the above firm duly authorized to sign proposals and enter into contracts. I certify that this RFQu- #20190061 is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a proposal for the same materials, supplies, or equipment, and is in all respects fair and without collusion or fraud.

The proposer understands that information contained in this Reply will be relied upon by City in awarding the proposed Contract and such information is warranted by the proposer to be true. The undersigned proposer agrees to furnish such additional information, prior to acceptance of any proposal relating to the qualifications of the proposer, as may be required by the City.

I certify that the information and responses provided on this Reply are true, accurate and complete. The City may contact any entity or reference listed in this Reply. Each entity or reference may make any information concerning the Consultant available to the City.

I agree to abide by all conditions of this RFQu.:

  
 \_\_\_\_\_  
 Signature

\_\_\_\_\_  
 Principal  
 \_\_\_\_\_  
 Title

If a corporation renders this RFQu , the corporate seal attested by the secretary shall be affixed below. Any agent signing this RFQu shall attach to this form evidence of legal authority.

**Witnesses:**

\_\_\_\_\_  
 Print name

\_\_\_\_\_  
 Print name

**If Partnership:**

\_\_\_\_\_  
 Print Name of Firm

By: \_\_\_\_\_  
 (General Partner)

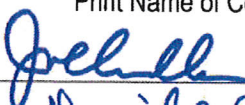
**If Individual:**

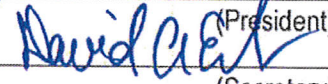
\_\_\_\_\_  
 Signature

\_\_\_\_\_  
 Print Name

**If Corporation:**

Berry Dunn McNeil & Parker, LLC  
 \_\_\_\_\_  
 Print Name of Corporation

By:   
 \_\_\_\_\_  
 (President)

Attest:   
 \_\_\_\_\_  
 (Secretary)

BerryDunn Entity Summary as of July 1, 2018

**Berry, Dunn, McNeil & Parker, LLC (formation: 2/9/1999; Tax ID # 01-0523282)  
Professional Limited Liability Company**

BDMP ENTITY SUMMARY

July 1, 2018

Berry, Dunn, McNeil & Parker, Inc.  
Payroll Company

Directors:     John M. Chandler  
                  Janice Latulippe  
                  David A. Erb  
                  Renee Bishop  
                  Timothy F. Masse

Officers:       John M. Chandler, President  
                  Timothy F. Masse, Vice President  
                  Janice Latulippe, Vice President  
                  Renee Bishop, Vice President  
                  David A. Erb, Vice President, Treasurer & Secretary  
                  Michael Quinlan, Clerk

## 1.0 Executive Summary

In the following sections, we will present the qualifications of BerryDunn and Fiscal Choice, the experience of our team members, and our approach to providing the services requested by the City. We believe that the following aspects of our proposal are most advantageous to the City:

- **We have assembled a team that offers extensive fee study experience as well as first-hand development services experience.** Our team includes two partners in Fiscal Choice who have collectively completed hundreds of fee studies over the course of their careers, as well as a former city community development director and city planner, who have hands-on experience in, and understanding of, development services. Our Fiscal Choice team members have presented at a national Government Finance Officers Association (GFOA) conference on best practices for user fee studies and had an article, *Weathering Fluctuations in Building Permit Revenues*, published in the April 2016 issue of *Government Finance Review*.
- **We regularly provide fee study services nationwide, including in Florida.** Our proposed team is currently working on a comprehensive fee study for the Town of Longboat Key and is familiar with Florida-specific fee and development requirements. The same team is recently completed a similar project for the City of Tucson, Arizona, and a comparative fee study for the City of Dallas, Texas.
- **We have relevant public-sector experience.** Our proposed project manager, Fred Turnier, has extensive experience in project management and development services, including fee and cost recovery analysis, business process improvement, system design and implementation, and policy analysis and formation. As a former community development and planning director of the cities of Reno and Fernley, Nevada, Fred is able to bring a unique and useful perspective to the City, supported by real-world experience.

## 2.0 Firm's Current Contracts

Our proposed project team has the full capacity and availability to engage in this project. Once we have a signed contract, our project manager manages the project according to the agreed-upon work plan, schedule, and budget. We have an excellent track record of meeting deadlines and, as a standard practice, we only allow changes to the timeline, scope, or project fees based on changes that are documented and approved by the client.

Some BerryDunn staff members work exclusively on one engagement, while others work on multiple engagements concurrently. On average, staff members work on two to four projects at any given time. Our consultants are accustomed to traveling to client sites based on the needs of the project. Consultants spend an average of 50% of their time working on-site at client locations and the remainder of their time working from one of BerryDunn's offices or their home office.

We have been providing professional consulting services for more than 30 years and use proven methodologies and tools to perform our work. As a result of this experience, we are skilled at developing realistic timelines that take the client's specific needs and common scheduling challenges into account. For example, when a project entails meeting with several agency stakeholders, we build time in the schedule for follow-up meetings, because we know that stakeholders' schedules can change on short notice, often due to circumstances beyond their control.

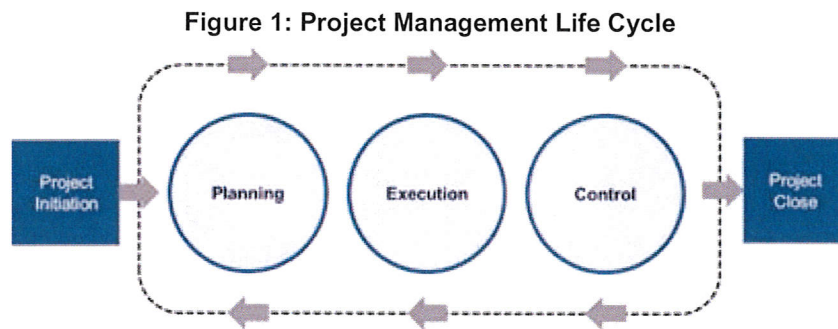
Because of our work with clients nationally, including in Alaska, Hawaii, and U.S. territories, we are accustomed to working with clients across all U.S. time zones. During project planning, we work with the client to discuss communication methods and identify strategies to promote effective communication—including communicating across time zones. We commit to responding to messages and calls within 24 hours of receipt—though our usual response time is much shorter. All team members are equipped with the technology and tools needed to perform their work (e.g., email, phone, project collaboration tools), which enables them to work from any location and be responsive to clients' needs.



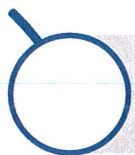


### 3.0 Management Plan

#### 3.1 Project Management Approach

To help ensure that project objectives are met, and initiation and completion of project work are conducted in a timely manner, an experienced project manager who understands and utilizes project management best practices leads each BerryDunn project. Our Government Consulting Group employs project management best practices from the Project Management Institute's (PMI®) Project Management Body of Knowledge (PMBOK®), Version 6. Our approach includes applying standard processes across the project management life cycle, as shown in Figure 1.



For the daily management and undertaking of project tasks, we strive to avoid unnecessary delays, enhance productivity, promote collaboration, and minimize barriers to participation. To that end, we utilize technology that is familiar or intuitive to most users, as detailed below.

-  **Collaborate**  
We will conduct remote meetings via **teleconference** or using **Zoom video conference** technology. Zoom also supports screen sharing and recording.
-  **Document**  
We will use common **Microsoft Office** (e.g., Word, Excel, Project, Visio) and **Adobe Acrobat** applications to develop deliverables for the City.
-  **Share**  
We will use the BerryDunn KnowledgeLink, a customized **Microsoft SharePoint** tool, to maintain project calendars and a secure repository of project documents.

A project with several team members, varied tasks, and a limited timeframe can fall below expectations if not kept in check. To keep our tasks and deliverables on schedule with quality measures to meet or exceed City's expectations, BerryDunn has established quality control guidelines that are shared among our team members and revisited often. Our work plan builds in time for quality checks so that the deliverables we produce are carefully reviewed prior to delivery to the City project manager.

The following quality assurance guidelines apply to the preparation, submission, review, and approval of project deliverables:



### 3.2 project team

A carefully assembled team of BerryDunn and Fiscal Choice professionals with complementary skills will be responsible for providing the proposed services to the City. Please see Table 1 for a summary of our proposed team members, their project roles, and backgrounds.

**Table 1: Project Roles and Responsibilities**

	Name/Title	Project Role and Background
BerryDunn Team	<p><b>Chad Snow, PMP, CFE</b> Principal</p>	<p>A principal at BerryDunn and the leader of the Local Government Practice Area, Chad is dedicated to serving local government clients. He is a Certified Project Management Professional (PMP) and a Certified Fraud Examiner (CFE).</p> <p>Chad will serve as the principal in charge of this project. In this role, he will work with the project manager to monitor the progress of the project, track the initiation and completion of tasks and milestones, and oversee the quality and timeliness of all deliverables.</p>
	<p><b>Kevin Price, MPP, PMP</b> Engagement Manager</p>	<p>Kevin is a manager in BerryDunn’s Government Consulting Group. A certified PMP, he has extensive experience in assessing the business needs and processes of municipal clients for permitting, land management, electronic plan review, and enforcement functions. In addition, Kevin leads BerryDunn’s Community Development and Utility Operations Practice.</p>
	<p><b>Fred Turnier, MPA, AICP</b> Project Manager</p>	<p>Fred is a <b>former city manager and community development director</b> with more than 20 years of experience working with local government agencies and extensive experience assisting public sector entities with project management, business process improvement, fee and cost recovery analysis, system implementation and design, and policy analysis and formation. He focuses in the areas of planning, inspections, plan checking, code enforcement, business licensing, housing, and homeless services.</p> <p>As project manager, Fred will serve as BerryDunn’s primary point of contact with the City, monitor the progress of the project, track the initiation and completion of tasks and milestones, and oversee the work of our project team. He will also facilitate our information-gathering activities and lead the development of project deliverables. Fred will work in collaboration with all team members to facilitate meetings, conduct research, and analyze the City’s needs.</p>
	<p><b>Alex Kee, MPPM</b> Business Analyst</p>	<p>Alex is a consultant in BerryDunn’s Government Consulting Group. As a business analyst, Alex will support the project manager in the facilitation of on-site meetings and helping to ensure the timely completion of all project deliverables.</p>

Name/Title		Project Role and Background
		Alex is a former city management associate for the City of South Portland, Maine, and, most recently, served as <b>city planner</b> for the City of Westbrook, Maine. In this role, Alex was responsible for assisting developers, contractors, and the public in understanding planning-related items and processes. He was also responsible for the coordination of the planning review process, review of applications, and facets of the approval process.
	<b>Don Poland, PMP</b> Business Analyst	Don is a Florida-based senior consultant with a 30-year industry tenure. Before coming to BerryDunn, Don served as a consultant and project manager for the Florida Department of Environmental Protection (DEP), Office of Technology and Information Services Operations (OTIS); and the Florida Department of Environmental Protection (DEP), Division of State Lands/Office of Operations (DSL/OOO).  As a business analyst, Don will support the project manager in the facilitation of on-site meetings, and helping to ensure the timely completion of all project deliverables.
	<b>Additional BerryDunn Resources</b>	BerryDunn’s team will also include consultant(s) and/or senior consultant(s) from BerryDunn’s Government Consulting Group, comprised of more than 160 personnel. As business analysts, these resources will support the project team with efforts relating to fact-finding, research, and deliverable development.
<b>Fiscal Choice</b>	<b>Bruce Cowans, MA</b> <b>Jerry Wolf, MBA, CPA</b> Subject Matter Experts	Bruce and Jerry are partners with Fiscal Choice and have more than 30 years of experience helping public officials make choices regarding how to serve their constituents and fund their efforts, and have provided <b>hundreds of fee studies</b> .  They will serve as subject matter experts for this project, assisting with the facilitation of meetings with City personnel, conducting research, and developing project deliverables.

### 3.2.1 Resumes

On the following pages, we have provided resumes for our proposed project team.



#### **Chad Snow, PMP, CFE** **Principal**

Chad has more than 27 years of experience working with local government agencies and has extensive experience assisting government clients with project management, technology planning, business process improvement, system implementation and design, and enterprise systems. Prior to joining BerryDunn in 2006, Chad worked for a public sector system vendor, where he provided in-depth demonstrations on ERP, revenue, and public safety

applications to prospective government clients in addition to providing project management and implementation support. He also served as a police officer in Maine for 10 years.

#### **Key Qualifications**

- Leads Local Government Consulting Practice Area
- Project leadership for planning, selection, and implementation of a variety of public sector systems for dozens of clients
- Experienced in full life cycle of planning for and procuring new systems
- Experienced in leading IT assessments and strategic planning efforts
- Former employee of system vendor

#### **Relevant Experience**

**Enterprise Systems Planning:** Chad is experienced in the full life cycle of planning for and procuring new enterprise systems, having assisted cities, counties, and school districts across the country with their software replacement initiatives. He has managed every step of the process, from assessing the current environment to conducting needs assessments, defining functional and technical requirements, developing an RFP and scoring methodology, assisting with evaluation of proposals, and leading contract negotiations. He is knowledgeable about the functionality and limitations of various public sector systems available in the market, as well as best practices in automation of business processes, and brings this insight to every engagement.

**Tyler Technologies:** Chad worked for a vendor of public safety applications for six years. In this role, he provided process consulting and software reviews to more than 40 municipal, county, and state agencies, as well as conducted gap-fit analyses and developed business process recommendations to meet the needs of his implementation clients.

**City of Saco, Maine:** Chad was a police officer for a city in Maine for 10 years, focusing in accident reconstruction, field training, and investigations, as well as serving as a school resource officer.

#### **Key Clients:**

- City of Midland, TX
- City of Sioux Falls, SD
- Goochland County, VA
- Loudoun County, VA
- Minnehaha County, SD
- Outagamie County, WI

## **Education and Memberships**

BA, Criminology, University of Southern Maine

AS, Law Enforcement Technology, Southern Maine Technical College

Project Management Professional (PMP), Project Management Institute

Certified Fraud Examiner (CFE) Association of CFEs



## Kevin Price, MPP, PMP, Prosci® CCP Manager

Kevin is a manager in BerryDunn's Government Consulting Group. He leads our Community Development and Utility Operations Practice, assisting local government clients with business process improvement, system replacement, and fee analysis projects.

### Key Qualifications

- Experienced manager in BerryDunn's Government Consulting Group
- Leads the Community Development and Utility Operations Practice
- Strong understanding of system replacement and implementation project life cycle

### Relevant Experience

**Fee Analysis:** Kevin has assisted BerryDunn clients with fee analysis projects, including comparative fee analysis and cost of service projects. Kevin previously served as the Project Manager for the City of Dallas Comparative Fee Analysis Project and served as the Engagement Manager for the City of Tucson Cost of Service Project. Kevin is currently serving as the Engagement Manager for the City of Tucson Fee Schedule Redesign Project.

**System Selection and Implementation:** Kevin has assisted BerryDunn clients with every stage of system replacement and implementation projects, from needs assessment to requirements definition, RFP development, proposal evaluation, facilitation of vendor demonstrations, contract negotiation, and implementation project management. He is currently assisting the City of Tucson, Arizona, with the implementation of a new permitting system.

**Community Development and Utility Operations Technology:** Kevin has assisted BerryDunn clients with Community Development and Utility Operations system replacement projects, business process analysis and improvement, and various technology assessments. He is currently assisting Outagamie County, Wisconsin, with the implementation of its replacement permitting and licensing system. Kevin also previously assisted the City of Manassas, Virginia with the implementation of work order and fleet management modules as part of an ERP implementation project.

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

**Maine Department of Transportation:** Kevin worked in the Bureau of Systems Planning. He assisted with project planning—specifically, stakeholder meeting facilitation and the application of cost-sharing policies. Kevin also conducted a national best practices report and an analysis of the risks and opportunities associated with public/private partnerships.

**U.S. Senate Committee on Small Business:** Kevin assisted in the material preparation for a variety of committee activities. He also prepared vote recommendations for amendments to pending legislation, and researched and identified issue area experts to testify at committee hearings.

### Key Clients:

- Berks County, PA
- City of Boca Raton, FL

- City of College Station, TX
- City of Dallas, TX
- City of Dover, DE
- City of Farmers Branch, TX
- City of Fredericksburg, VA
- City of Frisco, TX
- City of Homestead, FL
- City of Pearland, TX
- City of Philadelphia, PA
- City of South Jordan, UT
- City of Tucson, AZ
- City of Wilmington, NC
- Lake County, IL
- Outagamie County, WI
- Scott County, IA

### **Education and Memberships**

Master's in Public Policy and Management, Concentration in Financial Management, University of Southern Maine

BA, Economics and Political Science, University of Maine

Project Management Professional (PMP), Project Management Institute

Prosci® Certified Change Practitioner

Lean Six Sigma Green Belt Certified

Associate Member, Urban and Regional Information Systems Association (URISA)

Associate Member, American Planning Association (APA)





## Fred Turnier, MPA, AICP Senior Consultant

Fred has more than 20 years of experience working with local government agencies and extensive experience assisting public sector entities with project management and development services, business process improvement, fee and cost-recovery analysis, system design and implementation, and policy analysis and formation. He focuses in the areas of community development, planning, building, inspections, code enforcement, business licensing, housing and homeless issues, land management, utilities, and infrastructure planning.

### Relevant Experience

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

**Fee Analysis:** Fred has assisted BerryDunn clients with fee analysis projects, including comparative fee analysis and cost of service projects. Fred previously assisted the City of Dallas with a Comparative Fee Analysis Project and served as the Project Manager for the City of Tucson Cost of Service Project. Fred is currently serving as the Project Manager for the City of Tucson Fee Schedule Redesign Project.

**Management of Innovative Programs:** In his various public sector roles, Fred has helped to develop a model for training small businesses in working with local Nevada jurisdictions; worked with solar and geothermal clients on site selection and transmission through federal and private lands; participated in the development of policies regarding air quality, water quality, and urban runoff; and consistently expanded the scope and depth of strategic planning in each organization he has been a part of. He is well versed in leading forward-thinking and, in some cases, controversial initiatives.

**City of Reno, Nevada:** During his tenure as community development director and planning manager, Fred oversaw the preparation of an annual budget of \$17 million, conducted a citywide development fee and cost-recovery analysis, and worked with the existing land management tracking vendor to expand capabilities for internal building plan reviews and inspections. He expanded the use of mobile data collection for ensuring Housing and Urban Development (HUD) compliance and assisted in creating a public training program for local small businesses interested in working with the City, which later became a model for statewide change. He updated the City's development code to be more user-friendly and incorporated Transit Oriented Development corridors and Mixed Use development centers into the City's Master Plan.

**City of Fernley, Nevada:** In his role as city manager and community development director, Fred was responsible for the development and presentation of a budget of more than \$15 million. In his role, Fred also worked closely with elected officials and community boards on a wide variety of initiatives, including the City's first strategic planning process, and successfully acquired more than \$20 million in American Recovery and Reinvestment Act (ARRA) stimulus monies for energy audits, redevelopment, and flood victim assistance.

**Sierra Land Solutions/Nevada Planning:** As a member and owner, Fred specialized in project management, land and infrastructure planning and costs estimates, entitlement processing, right-of-way

acquisition, environmental permitting, negotiating entitlement conditions, and owner representation/public hearing presentations. His clients spanned California, Nevada, Idaho, and Arizona.

**CH2M Hill:** Fred was a division planning manager of an interdisciplinary team of planning, engineering, and environmental professionals. He led several complex and controversial development projects, which included power generation siting, land use, and environmental permitting. He also permitted transmission alignments through federal and private lands, including right-of-way negotiation, the NEPA process, and compliance plans for the U.S. Department of the Interior.

**Apex Industrial Park:** Fred was responsible for negotiating the hiring of a consulting staff with a \$2 million annual budget to plan for and develop a 21,000-acre industrial park. He managed multiple NEPA right-of-way applications and state environmental processes; served as technical liaison for the Mirant of Las Vegas power generation facility and other end users; and was the point of contact for interactions with Nellis Air Force Base and federal, state, and local agencies to permit transmission lines, roads, groundwater requests, land use applications, and Endangered Species Act (ESA) issues.

**Key Clients:**

- Berks County, PA
- City of Boca Raton, FL
- City of Dallas TX
- City of Philadelphia, PA
- City of Santa Fe, NM
- City of Tucson, AZ
- City of Frisco, TX
- Pitkin County, CO
- Beaverton, OR
- Town of Longboat Key, FL

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**Education and Memberships**

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

BA, Economics and Geography, University of Nevada, Reno

Certified Planner, American Institute of Certified Planners (AICP)

Member, American Planning Association

**Conferences and Events**

MIT Center for Advanced Urbanism, Future of Suburbia, 2015, expert panel participant

Washoe County Community Needs Health Assessment and Conference, 2015, member and conference speaker

IBM Smarter Cities, 2014, participant

Mayors Institute on City Design – West, 2013, participant



## Alex Kee, MPPM Consultant

Alex is a consultant in BerryDunn's Government Consulting Group who regularly serves as a business analyst to facilitate meetings, record findings, develop deliverables, and meet other project-specific needs. Alex has more than six years of experience working with local government agencies and extensive experience assisting public-sector entities with planning and community development.

### Key Qualifications

- Experienced business analyst for BerryDunn's Government Consulting Group
- More than six years of experience working with local government agencies
- Skilled facilitator who has assisted public-sector entities with planning and community development

### Relevant Experience

**Community Development:** As a former city planner for the City of Westbrook, Maine, Alex has direct experience with many facets of public-sector planning and community development.

**System Implementation:** Alex has recently assisted with implementation oversight projects for our work with the City of Manassas, Virginia, and Outagamie County, Wisconsin. Alex's role included conducting readiness assessments and participating in vendor status calls.

**City of Westbrook, Maine:** In his role as city planner, Alex was responsible for assisting developers, contractors, and the public in understanding planning-related items and processes. He was also responsible for the coordination of the planning review process, review of applications, and facets of the approval process.

**City of South Portland, Maine:** As a city management associate, Alex was responsible for budget and financial analysis and management as well as customer service and general support of municipal operations. In addition, Alex applied research techniques, survey methods, and data collection for the city manager and council.

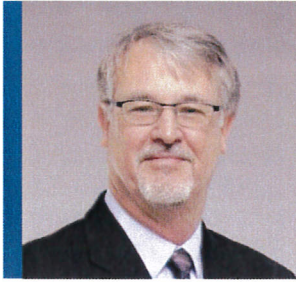
### Key Clients:

- City of Broken Arrow, OK
- City of Dallas, TX
- City of Frisco, TX
- City of Manassas, VA
- City of Midland, TX
- City of Rockville, MD
- City of Vancouver, WA
- Outagamie County, WI
- Pitkin County, CO
- Town of Wells, ME

### Education and Memberships

Masters in Policy, Planning, and Management (MPPM), University of Southern Maine

BA, Sports Management and Political Science



## Don Poland, PMP Senior Consultant

Don is a practiced project management professional with a customer focus. His experience demonstrates success in delivering software application projects on time, within budget, and exceeding customer expectations. As a senior consultant with BerryDunn's Government Consulting Group, Don brings strong listening skills and critical decision-making experience to meet client needs and implement necessary changes. He focuses on the client's needs to transform complex business requirements into creative and usable solutions.

### Key Qualifications

- 30-year industry tenure
- Extensive product expertise in ERP processes, including Accounting, Accounts Receivables, Account Payables, Services, Inventory Management, Job Costing, Time Tracking and Payroll
- Broad knowledge and experience in all phases of the SDLC (Waterfall and Agile)

### Relevant Experience

**Project Management.** Don has extensive experience as a project management consultant, focusing on systems solutions and implementation and software development, and working with public and private sectors.

**Brandt Information Services.** While at Brandt, Don acted as a consultant and project manager for the Florida Department of Environmental Protection (DEP), Office of Technology and Information Services Operations (OTIS); and the Florida Department of Environmental Protection (DEP), Division of State Lands/Office of Operations (DSL/OOO). He managed and led projects such as a \$400,000 project to create an electronic Lab Reporting submission for the Division of Water Resource Management. He also oversaw and managed a \$1.2M contract to extend FL-SOLARIS database and application to include all Florida Conservation Lands owned and Conservation Easements retained by the federal, county and municipal governments.

**Valens Software.** Don acted as Director of Customer Experience, where he provided leadership and product expertise to clients and internal implementations team to successfully implement and operate ProfitZoom in their organizations. He managed the initial and current development of ProfitZoom, including the Business Analysis of its preceding product for requirements definition, screen design, technical design, testing, resource assignments, and progress tracking and reporting.

**Independent Consultant.** As senior project manager, Don managed a team of six individuals to identify, design, and build services and applications for Public Health Interoperability relating to vocabulary and ontology services. He also managed various web-based software development projects with cross-functional teams comprised of 8 – 12 team members that included Business Analysts, Technical Writers, Content & Graphic Designers, Database Developers, JAVA Developers, Quality Assurance and Infrastructure Specialists.

### Education and Memberships

BS, Mathematics, University of Sioux Falls

Project Management Professional (PMP), Project Management Institute



## **Jerry Wolf, MA, MBA, CPA**

### **Subject Matter Expert**

As a partner at Fiscal Choice, Jerry is an experienced financial and revenue manager within the state and local agency environment and has led major assignments for the City of Chicago (enterprise and internal funds, user fees, and budget planning) as well as New York City. These projects focused on how the cost of services supported by the cities' general fund were to be shared by related governments and resulted in the recovery of billions of dollars for their respective general funds. He has practical experience in the areas of human services management and finance.

### **Key Qualifications**

- Public Consulting Group of Boston, Manager – Midwest
- MAXIMUS Consulting Services, Senior Vice President
- David M. Griffith & Associates, Senior Vice President, CFO, board member (merged with MAXIMUS in 1998)
- Arthur Young & Company, Manager – Public Sector Consulting
- An elected city council member and finance chair, 2005 – 2015

### **Relevant Experience**

**Fee Study Subject Matter Expert.** Jerry has extensive experience in the preparation, review, and negotiation of indirect cost rate proposals and cost allocation plans. This experience extends to all types of state and local governments, educational institutions, and nonprofit agencies. While at David M. Griffith & Associates, Ltd. (merged with MAXIMUS, Inc., in 1998), Jerry was responsible for directing cost allocation projects in 8 Midwestern and 12 Eastern states, with more than 600 clients. Clients ranged from small rural counties to the largest cities and counties in the region. He also developed cost allocation strategies and directed cost allocation projects for numerous state agencies including Illinois, Wisconsin, and Ohio.

### **Key Clients:**

- Alachua County, FL
- Catholic Charities of Chicago
- City of Chicago, IL
- City of Cleveland, IL
- City of Dallas, TX
- City of Detroit, MI
- City of New York, NY
- City of St. Louis, MO
- Cook County, IL
- Manatee County, FL
- Polk County, FL
- St. Louis County, MO
- Wakulla County, FL

### **Education and Memberships**

MBA, University of Chicago

MA, Social Policy, University of Chicago

BA, Political Science and Economics, University of Chicago

CPA, State of Illinois



## Bruce Cowans, MPP Subject Matter Expert

Bruce is a principal with Fiscal Choice with more than 30 years of experience helping hundreds of public agencies make decisions regarding how to serve the public and how to fund those efforts. He has conducted hundreds of user-fee and rate-setting studies for virtually every type of billable governmental service, and has analyzed service delivery methods, costs, and cost-recovery options.

### Key Qualifications

- A consultant to public agencies on cost-of-service and operations improvement with Price Waterhouse's Office of Government Services (Washington, D.C.)
- A budget analyst in the Office of the U.S. Treasury Secretary
- An elected city council member and finance chair, 2005 – 2015
- A real estate industry portfolio analyst with JMB Institutional Realty
- Senior Vice President with an NYSE-listed company (MAXIMUS), where he directed the user fee practice

### Relevant Experience

**Fee Study Subject Matter Expert.** Bruce has completed hundreds of user fee studies nationally of virtually every type of billable governmental service, analyzing service delivery methods, costs, and cost-recovery options. He has reviewed the service levels of all departments, validating staffing and spending levels and streamlining service delivery processes and established productivity standards, balance workflow, and staffing needs.

### Key Clients:

- Alachua County, FL
- City of Abilene, TX
- City of Atlanta, GA
- City of Chicago, IL
- City of Houston, TX
- City of Miami Beach, FL
- City of Midland, TX
- City of Pittsburgh, PA
- City of Reno, NV
- City of St. Louis, MO
- City of Sugar Land, TX
- Hillsborough County, FL
- Kenosha County, WI
- Manatee County, FL
- Metropolitan Government of Nashville & Davidson County, TN
- Montgomery County, MD
- Polk County, FL
- St. Louis County, MO

### Education and Memberships

BS, Environmental Studies, Pitzer College

MA, Public Policy, Duke University

### 3.3 Detailed Work Plan

We have developed a detailed work plan, presented on the following pages, to align with the City's Scope of Work as described in the RFQ.

#### Project Management

- 1. Conduct initial project kickoff teleconference.** BerryDunn will facilitate a project kickoff teleconference with the City project team. During this meeting, BerryDunn will work with the City to identify dates for the project schedule and confirm availability for the on-site current environment analysis meetings. In addition, BerryDunn will confirm with the City the approach for the 15-peer jurisdiction comparison.
- 2. Develop and review Draft Project Work Plan and Schedule.** Once dates have been confirmed with the City, BerryDunn will develop a Draft Project Work Plan and Schedule. BerryDunn will review the draft with the City via teleconference before finalizing the document.



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

- 3. Facilitate biweekly project status update teleconferences.** As part of BerryDunn's ongoing project management of this engagement, we will facilitate biweekly status calls with the City project team to provide project updates. These brief reports will include a description of the activities and accomplishments for the reporting period, plans for the upcoming weeks, any problems encountered during the reporting period, and any anticipated problems that may impact project deliverables.



#### *Deliverable 2: Biweekly Project Status Updates*

#### Phase 1: Current Environment Analysis

- 4. Review Existing Documentation.** Prior to conducting the on-site work, BerryDunn will submit an Information Request Sheet to the City to request available documentation to gain an understanding of the City's current environment and to determine emerging challenges that will likely be incorporated into the fee study. BerryDunn will review existing fee schedules and other available documentation, including, but not limited to department budgets, indirect rate, service demand, organization charts, and other available cost information.

BerryDunn respectfully requests that the City provide available documentation prior to the interviews, as reviewing this information in advance of the on-site work will enable us to be more efficient, become more knowledgeable of the current environment, and make best use of City personnel's time.

- 5. Develop Data Collection Model.** While reviewing the City's documentation, BerryDunn will develop a Data Collection Model. The Data Collection Model is a Microsoft Excel

spreadsheet that BerryDunn will use during our on-site interviews to collect and analyze data. This model will be populated by information provided in response to the Information Request Sheet.

6. **On-site Interviews with City Staff.** BerryDunn will interview Public Works, Finance, and other City staff as needed to review the data collection model, review existing staffing levels and demands for service such as number and type of plans being reviewed. We propose that during the on-site trip, we will interview the City Manager to confirm existing issues or strategic initiatives that will impact the report.
7. **Populate Data Collection Model.** Using the Data Collection Model as a framework, BerryDunn will be on-site for two and a half days, during which time we will interview various stakeholders, including, but not limited to Public Works staff, the Finance Department, the City Manager, and other department staff as needed to gain a better picture of the direct and indirect costs to provide the required services.

By conducting these interviews in a two and a half-day span, we are taking the City's time into consideration, as well as workload and volume. We believe that there is value in meeting with staff to discuss both fees and staffing levels as part of one trip. During the fee analysis discussions, we will also seek information related to the current fee volumes, annual trends, and available resources. All of these items are directly related to the current and future staffing level needs of the Building Division.

8. **Review and Complete Data Collection Model.** Following the on-site interviews, the BerryDunn team will conduct follow-up web conference work sessions to complete and review the Data Collection Model workbook. Our goal is to complete as much of the workbook as possible during our on-site meetings, but we recognize that there may be a need to follow up if specific individuals or information is unavailable during our meetings. The number of conferences to review the workbook is dependent on the status of the workbooks, as well as the City's time; however, we will not place any caps or limits of review sessions that will be required to complete the workbooks.
9. **Develop Draft Current Environment Analysis Memo.** Using the information that we have gathered, we will develop a comprehensive analysis report of the current staffing levels and costs of doing business for the Public Works Department and the costs of departments supporting Public Works.
10. **Review and Update Draft Current Environment Analysis Report.** We will conduct a web conference with the City project team to review the draft report.

Based on the City's feedback, we will update the draft report, and conduct additional web conferences as needed until the report is finalized.



### *Deliverable 3: Current Environment Analysis Report*

## **Phase 2: Future Environment Memo and Workbook**



11. **Develop Draft Future Environment Memo and Workbook.** BerryDunn will develop a draft Future Environment Memo and Workbook. The document will include recommended changes to the Public Works Department staffing levels, indirect and overhead costs for the Public Works Department contribution to the general fund. The document will have recommendations to amend the fee schedules for the Public Works Department, including justifications for change, and recommendations on reestablishing fees in future years. It will also include a detailed model for indirect cost allocations will be provided in Microsoft Excel as an Appendix.
12. **Review and Update Draft Future Environment Memo and Workbook.** Once the draft is complete, we will review the documents with the City via web conference and incorporate any feedback until the report is finalized.



**Deliverable 4:** *Future Environment Memo and Workbook*

13. **Review and Compare up to 15 Peer Jurisdictions.** BerryDunn will review up to 15 peer jurisdictions, using information gathered from their websites and through a Web survey. We will follow up with the peer cities, to encourage complete and timely responses, and to clarify understanding of findings. We will then develop a draft Peer Jurisdiction Comparison Memo, which will show each jurisdiction's fee schedule methodology and fees as a comparison against proposed new fees for the City. We will provide a draft of the Memo to the City, and facilitate a teleconference to review and implement any necessary updates.



**Deliverable 5:** *Peer Jurisdiction Comparison Memo*

14. **Develop Public Works Commercial and Residential Fee Report.** BerryDunn will compile the previous deliverables into a Final Draft Public Works Commercial and Residential Fee Report. BerryDunn will facilitate an on-site review the Final Draft with the City's leadership team to review and update based on the client's input.



**Deliverable 6:** *Public Works Commercial and Residential Fee Report*

### Phase 3: Public Process and Findings Presentation

15. **Develop and Deliver Presentation of Findings and Recommendations.** We will develop a draft of the Public Works Commercial and Residential Fee Report PowerPoint presentation. We will then provide the draft to the City's leadership team, review the presentation and update the draft to final. BerryDunn will present the report on-site, building buy-in for the recommendations and findings outlined in the report, and providing an opportunity for stakeholders to ask questions of our consultants and the City project team.
16. **Stakeholder Findings and Recommendations Presentation.** BerryDunn will be available to present the findings and recommendations to a stakeholder group identified by the City.

BerryDunn will be available to present the findings and recommendations and to answer any questions that may arise.

17. **One-on-one presentations with the City Council Members.** BerryDunn will assist City staff with one-on-one briefings of the findings and recommendations. We will be available to answer questions, discuss methodology, best practices, and peer jurisdiction comparisons.
18. **City Council Findings and Recommendations Presentation.** BerryDunn will assist in the presentation to the City Council. Our team will be available to present the findings and recommendations and to answer any questions that may arise. The consultant will be available via phone or video conference for the second reading City Council meeting.



***Deliverable 7: Presentation of Recommendations to Stakeholder group meeting, City Council one-on-one briefings and First Reading meeting***

## 4.0 Work Plan

In developing our detailed work plan and schedule, we have made the following assumptions regarding the City's participation in the process:

- The City will assist in identifying and reserving space for on-site meetings.
- The City project team, with BerryDunn's assistance, will identify the appropriate City stakeholders for inclusion in our fact-finding, as well as facilitate communications and scheduling with these stakeholders.
- The City project team will review and provide input to deliverables according to the Project Work Plan and Schedule developed as our first deliverable.
- The City provided 15 jurisdictional comparisons and BerryDunn will investigate all 15 and provide up to 10 jurisdictional comparisons.

## 5.0 Proposed Schedule

In Table 2 below, we have provided a project schedule for the tasks detailed above, including significant milestones.

**Table 2: Project Schedule**

Phase/Task	Week
<b>Project Management</b>	
Initial kickoff teleconference	1
Develop draft Project Work Plan and Schedule	1
Review draft Project Work Plan and Schedule	1
Update draft Project Work Plan and Schedule to final	1
<b>Deliverable 1:</b> Project Work Plan and Schedule	
Facilitate Biweekly Project State Update Teleconferences	2 – 32 (ongoing)
<b>Deliverable 2:</b> Biweekly Project Status Updates	
<b>Phase 1: Current Environment Analysis</b>	
Review documentation from the Information Request Sheet.	2 – 4
Develop data collection model for on-site review with City staff.	4 – 5
Conduct on-site interviews with City staff to review data collection model and populate model workbook. ( <i>on-site</i> )	4 – 5
Conduct follow-up web conference work sessions to complete data collection model workbook and follow-up discussions with City stakeholders.	5 – 8
Develop comprehensive analysis report on the current staffing levels and costs of doing business.	8 – 12
City project team review of draft report via web conference.	8 – 12
Conduct follow-up web conference work sessions to complete data collection model workbook and follow-up discussions with City stakeholders.	8 – 12
<b>Deliverable 3:</b> Current Environment Analysis Report	
<b>Phase 2: Future Environment Recommendations</b>	
Develop Future Environment Recommendations Report	8 – 12
Conduct web conference review of draft report with City project team.	8 – 12

Phase/Task	Week
Update draft report based on City feedback, conducting additional web conferences as needed until finalization.	8 – 12
<b>Deliverable 4:</b> Future Environment Memo and Workbook	
Review 15 Peer Jurisdictions and Compare up to 10 Jurisdictions	2 – 12
Develop Peer Jurisdiction Comparison Memo, and review with City	2 – 12
<b>Deliverable 5:</b> Peer Jurisdiction Comparison Memo	
Develop Commercial and Residential Fee Report.	12 – 14
Review Commercial and Residential Fee Report with City ( <i>on-site</i> ).	14 – 16
<b>Deliverable 6:</b> Final Public Works Commercial and Residential Fee Report	
<b>Phase 3: Public Process and Findings Presentation</b>	
Develop Presentation of Findings and Recommendations Presentation.	17
Deliver Presentation of Findings and Recommendations Presentation ( <i>on-site</i> ).	18 – 19
Finalize presentation based on feedback, and confirm reports.	19
Deliver Presentation to the City Commission ( <i>on-site</i> )	20
<b>Deliverable 7:</b> Presentation of Recommendations to Stakeholder group meeting, City Council one-on-one briefings and First Reading Meeting	

## 8.0 Firm's Location and Documentation

### 8.1 BerryDunn Overview

BerryDunn is a consulting and certified public accounting firm headquartered in Maine and serving clients nationally. We were formed in 1974 with nine professionals and have experienced sustained growth throughout our 45-year history. We provide a full range of services, including IT consulting; management consulting; and audit, accounting, and tax services.

BerryDunn's Government Consulting Group has been providing management and IT consulting services to clients in local government since 1986. We maintain a national presence and have worked with more than **300 local and state agencies throughout the country**.



Within our Government Consulting Group, our Community Development Practice focuses on the municipal and county processes and systems related to permitting, inspections, planning, code enforcement, and land management functions. In addition to system selection projects, our Community Development Practice leads business process review and improvement projects.

As a result, we are able to leverage insight gained from our process review and improvement projects to better serve our system selection clients. This experience includes business processes related to permitting, planning and zoning, code enforcement, inspections and licensing, business licensing, and engineering.

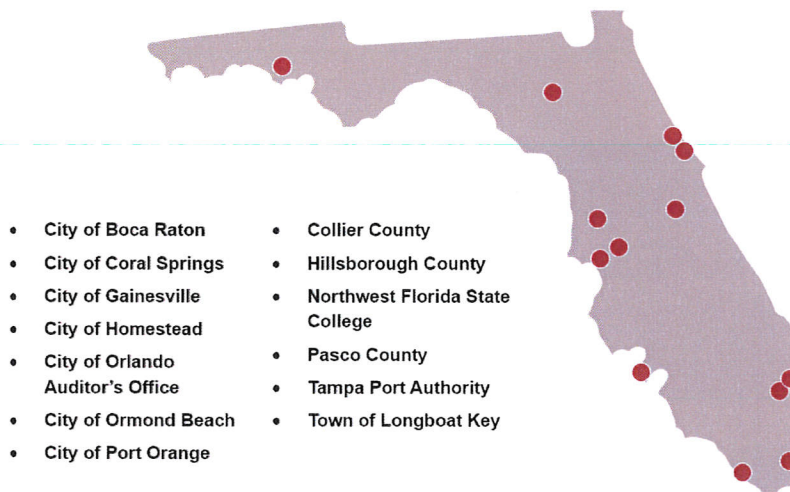
Our dedicated Local Government Practice Area is committed to understanding municipal and county government operations, as well as the systems and business processes required to provide necessary services to their internal departments and the constituents they serve. We participate in several industry groups and associations, including those listed in the Figure 4.

**Figure 4: Industry Group and Association Participation**

Alliance for Innovation	American Planning Association (APA)	American Public Works Associations (APWA)
American Water Works Association (AWWA)	International Association of Assessing Officers (IAAO)	International Code Council (ICC)
International City/County Managers Association (ICMA)	Project Management Institute (PMI)	Urban Regional Information Systems Association (URISA)

Our participation in these groups helps us to stay abreast of current topics and issues affecting our clients, as well as contributes to our expertise.

City will benefit from BerryDunn’s demonstrated commitment to serving public-sector clients in Florida. We have developed a strong understanding of the public-sector landscape in the State through recent or ongoing consulting engagements with the clients listed below.



## 8.2 Fiscal Choice Overview

Fiscal Choice works nationally with cities, counties, and state governments of all sizes on rate setting, user fee, cost allocation, and operational improvement studies.

For many years, Maximus, Inc.—a NYSE-listed company—was the dominant firm in this service category. When Maximus, Inc. decided to exit this type of consulting to focus on business process outsourcing, two former Maximus, Inc. senior vice presidents—Bruce Cowans and Jerry Wolf—founded Fiscal Choice.

Throughout their careers, Bruce and Jerry have completed hundreds of fee study projects similar to the one sought by the City. They regularly speak at industry events, publish in professional association publications, and serve as expert witnesses for legal proceedings. They continue to serve the needs of long-term clients, as well as new clients that need their expertise. Fiscal Choice is headquartered in Northfield, Illinois. They call upon several associates as needed to support their work.

Fiscal Choice's most recent experience with development services in large local governments includes work for the following:

- Alachua County, FL
- City of Bloomington, IL
- City of Melbourne, FL
- City of Pittsburgh, PA
- City of Reno, NV
- Hillsborough County, FL
- Manatee County, FL
- Metropolitan Government of Nashville & Davidson County, TN
- Nassau County, FL



**REFERENCE CHECK FORM**  
**Proposer Instructions:** Fill out top portion only.  
(Please print or type)

RFQu Number: 20190061	
Title: Study of Commercial and Residential Fees for the Public Works Department	
Proposer/Respondent: <u>Berry Dunn McNeil &amp; Parker, LLC d/b/a BerryDunn</u>	
Reference: <u>Hillsborough County, FL</u>	Fax #: _____
Email: <u>fernandezjr@HCFLGov.net</u>	Telephone #: <u>(813) 307-3435</u>
Person to contact: <u>Jose R. Fernandez, Business Manager II Development Services Department</u>	

**Reference Instructions:** The above Proposer has given your name to the City of Port St. Lucie as a reference. Please complete the information below and email within two (2) days to [jraymond@cityofpsl.com](mailto:jraymond@cityofpsl.com). It is the Bidder's responsibility to ensure that contacts are willing to provide a complete reference.

Describe the scope of work of the contract awarded by your firm/entity to this Consultant. What type of services were performed?

Was the project completed on time and within the specified guidelines?

What problems were encountered (claims)?

How would you rate the Consultant firm overall? Select one: Poor Fair Good Excellent

Would you contract with this Consultant again? Yes  No  Maybe

Comments if any:

Thank you.

**Note: All references must be submitted by the RFQu submittal deadline.**

**REFERENCE CHECK FORM**  
**Proposer Instructions:** Fill out top portion only.  
(Please print or type)

RFQu Number: 20190061	
Title: Study of Commercial and Residential Fees for the Public Works Department	
Proposer/Respondent: <u>Berry Dunn McNeil &amp; Parker, LLC d/b/a BerryDunn</u>	
Reference: <u>Town of Long Boat Key, FL</u>	Fax #: _____
Email: <u>aparsons@longboatkey.org</u>	Telephone #: <u>941-316-1966 ext. 2510</u>
Person to contact: <u>Allen Parsons, AICP, Director, Planning, Zoning &amp; Building Department</u>	

**Reference Instructions:** The above Proposer has given your name to the City of Port St. Lucie as a reference. Please complete the information below and email within two (2) days to [jraymond@cityofpsl.com](mailto:jraymond@cityofpsl.com). It is the Bidder's responsibility to ensure that contacts are willing to provide a complete reference.

Describe the scope of work of the contract awarded by your firm/entity to this Consultant. What type of services were performed?

Was the project completed on time and within the specified guidelines?

What problems were encountered (claims)?

How would you rate the Consultant firm overall? Select one: Poor Fair Good Excellent

Would you contract with this Consultant again? Yes  No  Maybe

Comments if any:

Thank you.

**Note: All references must be submitted by the RFQu submittal deadline.**

**REFERENCE CHECK FORM**  
**Proposer Instructions:** Fill out top portion only.  
(Please print or type)

RFQu Number: 20190061	
Title: Study of Commercial and Residential Fees for the Public Works Department	
Proposer/Respondent: <u>Berry Dunn McNeil &amp; Parker, LLC d/b/a BerryDunn</u>	
Reference: <u>City of Tucson, AZ</u>	Fax #: _____
Email: <u>Leslie.ethen@tucsonaz.com</u>	Telephone #: <u>520-837-6930</u>
Person to contact: <u>Leslie Ethen, Director, Planning, Zoning &amp; Building Department</u>	

**Reference Instructions:** The above Proposer has given your name to the City of Port St. Lucie as a reference. Please complete the information below and email within two (2) days to [jraymond@cityofpsl.com](mailto:jraymond@cityofpsl.com). It is the Bidder's responsibility to ensure that contacts are willing to provide a complete reference.

Describe the scope of work of the contract awarded by your firm/entity to this Consultant. What type of services were performed?

Was the project completed on time and within the specified guidelines?

What problems were encountered (claims)?

How would you rate the Consultant firm overall? Select one: Poor Fair Good Excellent

Would you contract with this Consultant again? Yes  No  Maybe

Comments if any:

Thank you.

**Note: All references must be submitted by the RFQu submittal deadline.**

## Appendix A: Exceptions

BerryDunn accepts the City's Terms and Conditions with the exceptions noted below:

- **Pg. 20, Section X – Indemnification/Hold Harmless:** Our firm carries a 10 million dollar professional liability policy which protects us and our clients from “claims of negligence in professional services.” However, the policy contains language within it that states that it will not apply to a project when we take on additional liabilities, such as an agreement to indemnify for something other than negligence under a contract. We suggest the following alternative language *“The Contractor agrees, to the fullest extent permitted by law, to indemnify and hold harmless the Client against damages, liabilities, and costs arising from the negligent acts of the Contractor in the performance of professional services under this Agreement, to the extent that Contractor is responsible for such damages, liabilities and costs on a comparative basis of fault and responsibility between the Contractor and Client. The Client shall not be obligated to indemnify the Client for the Client’s own negligence.”*
- **Pg. 26, City’s Public-Relations Image:** We consider this clause to be overly broad and request that the language we amended to read *“Any personnel in the employ of the Consultant involved in the execution of work that is deemed to be conducting him/herself in an unacceptable manner **directly relating to the work** shall be removed from the project at the request of the City Manager.”*