

SERVICES AGREEMENT BETWEEN THE CITY OF VERNON AND RAFTELIS
FINANCIAL CONSULTANTS, INC. FOR SOLID WASTE MANAGEMENT
CONSULTING SERVICES

COVER PAGE

Contractor:	Raftelis Financial Consultants, Inc.
Responsible Principal of Contract:	Henrietta Locklear, Senior VP
Notice Information - Contractor:	Raftelis Financial Consultants, Inc 227 W Trade St #1400 Charlotte, NC 28202 Attention: Jennifer Porter, Principal Consultant Telephone: (347)979-4992
Notice Information - City:	City of Vernon 4305 Santa Fe Avenue Vernon, CA 90058 Attention: Freddie Agyin, Director of Health and Environmental Control Dept. Telephone: (323) 826-1448
Commencement Date:	May 20, 2025
Termination Date:	December 31, 2029
Consideration:	Total not to exceed \$205,000(includes all applicable sales tax); and more particularly described in Exhibit B
Records Retention Period	Three (3) years, pursuant to Section 11.20

SERVICES AGREEMENT BETWEEN THE CITY OF VERNON AND RAFTELIS FINANCIAL CONSULTANTS, INC. FOR SOLID WASTE MANAGEMENT CONSULTING SERVICES

This Agreement is made between the City of Vernon, a California charter City and California municipal corporation ("City"), and Raftelis Financial Consultants, Inc, a North Carolina corporation ("Contractor").

The City and Contractor agree as follows:

1.0 EMPLOYMENT OF CONTRACTOR. City agrees to engage Contractor to perform the services as hereinafter set forth as authorized by the City Council on May 20, 2025.

2.0 SCOPE OF SERVICES.

2.1 Contractor shall perform all work necessary to complete the services set forth in the City's Request for Proposals issued on or about March 10, 2025, and titled RFP for Solid Waste Management Consulting Services, and Contractor's proposal to the City ("Proposal") dated March 27, 2025, Exhibit "A", a copy which is attached to and incorporated into this Agreement by reference.

2.2 All services shall be performed to the satisfaction of City.

2.3 All services shall be performed in a competent, professional, and satisfactory manner in accordance with the prevailing industry standards for such services.

3.0 PERSONNEL.

3.1 Contractor represents that it employs, or will employ, at its own expense, all personnel required to perform the services under this Agreement.

3.2 Contractor shall not subcontract any services to be performed by it under this Agreement without prior written approval of City.

3.3 All of the services required hereunder will be performed by Contractor or by City approved subcontractors. Contractor, and all personnel engaged in the work, shall be fully qualified and authorized or permitted under State and local law to perform such services and shall be subject to approval by the City.

4.0 TERM.

The term of this Agreement shall commence on May 20, 2025 , and it shall continue until December 31, 2029, unless terminated at an earlier date pursuant to the provisions thereof.

5.0 COMPENSATION AND FEES.

5.1 Contractor has established rates for the City of Vernon which are comparable to and do not exceed the best rates offered to other governmental entities in and around Los Angeles County for the same services. For satisfactory and timely performance of

the services, the City will pay Contractor in accordance with the payment schedule set forth in Exhibit "B" attached hereto and incorporated herein by reference.

5.2 Contractor's grand total compensation for the entire term of this Agreement, shall not exceed [state amount] without the prior authorization of the City, as appropriate, and written amendment of this Agreement.

5.3 Contractor shall, at its sole cost and expense, furnish all necessary and incidental labor, material, supplies, facilities, equipment, and transportation which may be required for furnishing services pursuant to this Agreement. Materials shall be of the highest quality. The above Agreement fee shall include all staff time and all clerical, administrative, overhead, insurance, reproduction, telephone, air travel, auto rental, subsistence, and all related costs and expenses.

5.4 City shall reimburse Contractor only for those costs or expenses specifically approved in this Agreement, or specifically approved in writing in advance by City. Unless otherwise approved, such costs shall be limited and include nothing more than the following costs incurred by Contractor:

5.4.1 The actual costs of subcontractors for performance of any of the services that Contractor agrees to render pursuant to this Agreement, which have been approved in advance by City and awarded in accordance with this Agreement.

5.4.2 Approved reproduction charges.

5.4.3 Actual costs and/or other costs and/or payments specifically authorized in advance in writing and incurred by Contractor in the performance of this Agreement.

5.5 Contractor shall not receive any compensation for extra work performed without the prior written authorization of City. As used herein, "extra work" means any work that is determined by City to be necessary for the proper completion of the Project, but which is not included within the Scope of Services and which the parties did not reasonably anticipate would be necessary at the time of execution of this Agreement. Compensation for any authorized extra work shall be paid in accordance with the payment schedule as set forth in Exhibit "B," if the extra work has been approved by the City.

5.6 Licenses, Permits, Fees, and Assessments. Contractor shall obtain, at Contractor's sole cost and expense, such licenses, permits, and approvals as may be required by law for the performance of the services required by this Agreement. Contractor shall have the sole obligation to pay for any fees, assessments, and taxes, plus applicable penalties and

interest, which may be imposed by law and which arise from or are necessary for the performance of the Services by this Agreement.

6.0 PAYMENT.

6.1 As scheduled services are completed, Contractor shall submit to the City an invoice for the services completed, authorized expenses, and authorized extra work actually performed or incurred according to said schedule.

6.2 Each such invoice shall state the basis for the amount invoiced, including a detailed description of the services completed, the number of hours spent, reimbursable expenses incurred and any extra work performed.

6.3 Contractor shall also submit a progress report with each invoice that describes in reasonable detail the services and the extra work, if any, performed in the immediately preceding calendar month.

6.4 Contractor understands and agrees that invoices which lack sufficient detail to measure performance will be returned and not processed for payment.

6.5 City will pay Contractor the amount invoiced within thirty (30) days after the City approves the invoice.

6.6 Payment of such invoices shall be payment in full for all services, authorized costs, and authorized extra work covered by that invoice.

7.0 CITY'S RESPONSIBILITY. City shall cooperate with Contractor as may be reasonably necessary for Contractor to perform its services; and will give any required decisions as promptly as practicable so as to avoid unreasonable delay in the progress of Contractor's services.

8.0 COORDINATION OF SERVICES. Contractor agrees to work closely with City staff in the performance of Services and shall be available to City's staff, consultants, and other staff at all reasonable times.

9.0 INDEMNITY. Contractor agrees to indemnify City, its officers, elected officials, employees and agents against, and will hold and save each of them harmless from, any and all actions, suits, claims, damages to persons or property, losses, costs, penalties, obligations, errors, omissions or liabilities (herein "claims or liabilities"), including but not limited to professional negligence, that may be asserted or claimed by any person, firm or entity arising out of or in connection with the work, operations or activities of Contractor, its agents, employees, subcontractors, or invitees, provided for herein, or arising from the acts or omissions of Contractor hereunder, or arising from Contractor's performance of or failure to perform any term, provision, covenant or condition of this Agreement, except to the extent such

claims or liabilities arise from the gross negligence or willful misconduct of City, its officers, elected officials, agents or employees.

10.0 INSURANCE. Contractor shall procure and maintain for the duration of the Agreement insurance against claims for injuries to persons or damage to property that may arise from or in connection with the performance of the work hereunder by the Contractor, its agents, representative, or employees. The policies shall state that they afford primary coverage.

10.1 Automobile Liability Insurance – Primary insurance coverage shall be written on ISO Business Auto coverage form for all owned, hired, and non-owned automobiles or any auto. The policy shall have a combined single limit of not less than one million dollars (\$1,000,000). If Contractor is transporting one or more non-employee passengers in the performance of the services, the automobile liability policy shall have a combined single limit of two million dollars (\$2,000,000). If Contractor owns no autos, a hired, non-owned auto endorsement to the General Liability policy is acceptable.

10.1.1 Contractor agrees to subrogate automobile liability resulting from performance under this agreement by agreeing to defend, indemnify, and hold harmless, the City, and its respective employees, agents, and City Council from and against all claims, liabilities, suits, losses, damages, injuries and expenses, including all costs and reasonable attorney's fees ("Claims"), which are attributable to any act or omission by the Contractor under the performance of the services. The City of Vernon, its directors, commissioners, officers, employees, agents, and volunteers must be endorsed on the policy as additional insureds and, under the Contractors' policy, there shall be a waiver of subrogation, and the policy shall be primary and non-contributory and will not seek contribution from the City's insurance.

10.2 Commercial General Liability Insurance – Contractor shall carry General Liability Insurance covering all operations performed by or on behalf of the Contractor providing coverage for bodily injury and property damage with a single limit of not less than one million dollars (\$1,000,000) per occurrence and two million dollars (\$2,000,000) general aggregate limit written on an Insurance Services Office (ISO) Comprehensive General Liability "occurrence" Form CG 00 01 or its equivalent for coverage on an occurrence basis. The City of Vernon, its directors, commissioners, officers, employees, agents, and volunteers must be endorsed on the policy as additional insureds with respect to liability arising out of the Contractor's performance of this Agreement. The additional insured coverage under the Contractor's policy shall be

primary and non-contributory and will not seek contribution from the City's insurance. The policy shall be endorsed to include a waiver of subrogation.

10.2.1 If Contractor intends to employ other contractors as part of the services rendered, the City must approve and will establish the appropriate insurance requirements.

10.2.2 Contractor agrees to subrogate General Liability resulting from performance under this agreement by agreeing to defend, indemnify, and hold harmless, the City, and its respective employees, agents, and City Council from and against all claims, liabilities, suits, losses, damages, injuries and expenses, including all costs and reasonable attorney's fees ("Claims"), which are attributable to any act or omission by the Contractor under the performance of the services.

10.3 Professional Errors and Omissions Coverage in a sum of not less than one million dollars (\$1,000,000), where such risk is applicable. Applicable aggregate must be identified and claims history provided to determine amounts remaining under the aggregates. Contractor shall maintain such coverage for at least one (1) year after the termination of this agreement.

10.4 Umbrella Liability Insurance – An umbrella (over primary) may be used to comply with limits or other primary coverage requirements. When used, the umbrella policy shall apply to bodily injury/property damage and personal injury/advertising injury and shall include a "dropdown" provision providing primary coverage for any liability not covered by the primary policy. The umbrella policy shall have no additional exclusion or coverage difference from the primary policy. The coverage shall also apply to automobile liability.

10.5 Workers' Compensation/Employers Liability - Contractor shall comply with the applicable sections of the California Labor Code concerning workers' compensation for injuries on the job. Compliance is accomplished in one of the following manners:

10.5.1 Provide a copy of the permissive self-insurance certificate approved by the State of California; or

10.5.2 Secure and maintain in force a policy of workers' compensation insurance with statutory limits and Employer's Liability Insurance with a limit of one million dollars (\$1,000,000) per accident. The policy shall be endorsed to waive all rights of subrogation against City, its directors, commissioners, officers, employees, and volunteers for losses arising from performance of this Agreement or

10.5.3 If Contractor has no employees, it may certify or warrant to the City that it does not currently have any employees or individuals who are defined as "employees" under the Labor Code, and the requirement for Workers' Compensation coverage will be waived by completing the waiver form provided by the City.

10.6 If Contractor maintains broader coverage and/or higher limits than the minimums shown above, City requires and shall be entitled to the broader coverage and/or the higher limits maintained by the Contractor. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to the City.

10.7 Each insurance policy included in this clause shall be endorsed to state that coverage shall not be cancelled except after thirty (30) days prior written notice to City.

10.8 Insurance shall be placed with insurers with an A.M. Best rating of no less than A-VIII. Any self-insured retention or deductible in excess of \$25,000 must be approved in advance by the City. Any policies written on a claims-based basis must include a minimum of a 3-year tail.

10.9 Prior to the commencement of performance, Contractor shall furnish City with a certificate of insurance for each policy. Each certificate is to be signed by a person authorized by that insurer to evidence coverage on its behalf. The certificate(s) must be in a form approved by City. City may require complete, certified copies of any or all policies upon request.

10.10 Failure to maintain required insurance at all times shall constitute a default and material breach. In such event, Contractor shall immediately notify City and cease all performance under this Agreement until further directed by the City. In the absence of satisfactory insurance coverage, City may, at its option: (a) procure insurance with collection rights for premiums, attorney's fees, and costs against Contractor by way of set-off or recoupment from sums due to Contractor, at City's option; (b) immediately terminate this Agreement and seek damages from the Agreement resulting from said breach; or (c) self-insure the risk, with all damages and costs incurred, by judgment, settlement or otherwise, including attorney's fees and costs, being collectible from Contractor, by way of set-off or recoupment from any sums due to Contractor.

11.0 GENERAL TERMS AND CONDITIONS.

11.1 INDEPENDENT CONTRACTOR.

11.1.1 It is understood that in the performance of the services herein provided for, Contractor shall be, and is, an independent contractor, and is not an agent, officer or employee of City and shall furnish such services in its own manner and method except as

required by this Agreement, or any applicable statute, rule, or regulation. Further, Contractor has and shall retain the right to exercise full control over the employment, direction, compensation and discharge of all persons employed by Contractor in the performance of the services hereunder. City assumes no liability for Contractor's actions and performance, nor assumes responsibility for taxes, bonds, payments, or other commitments, implied or explicit, by or for Contractor. Contractor shall be solely responsible for, and shall indemnify, defend and save City harmless from all matters relating to the payment of its employees, subcontractors and independent contractors, including compliance with social security, withholding and all other wages, salaries, benefits, taxes, exactions, and regulations of any nature whatsoever.

11.1.2 Contractor acknowledges that Contractor and any subcontractors, agents or employees employed by Contractor shall not, under any circumstances, be considered employees of the City, and that they shall not be entitled to any of the benefits or rights afforded employees of City, including, but not limited to, sick leave, vacation leave, holiday pay, Public Employees Retirement System benefits, or health, life, dental, long-term disability or workers' compensation insurance benefits.

11.2 CONTRACTOR NOT AGENT. Except as the City may authorize in writing, Contractor and its subcontractors shall have no authority, express or implied, to act on behalf of or bind the City in any capacity whatsoever as agents or otherwise.

11.3 OWNERSHIP OF WORK. All documents and materials furnished by the City to Contractor shall remain the property of the City and shall be returned to the City upon termination of this Agreement. All reports, drawings, plans, specifications, computer tapes, floppy disks and printouts, studies, memoranda, computation sheets, and other documents prepared by Contractor in furtherance of the work shall be the sole property of City and shall be delivered to City whenever requested at no additional cost to the City. Contractor shall keep such documents and materials on file and available for audit by the City for at least three (3) years after completion or earlier termination of this Agreement. Contractor may make duplicate copies of such materials and documents for its own files or for such other purposes as may be authorized in writing by the City.

11.4 CORRECTION OF WORK. Contractor shall promptly correct any defective, inaccurate or incomplete tasks, deliverables, goods, services and other work, without additional cost to the City. The performance or acceptance of services furnished by Contractor shall not relieve the Contractor from the obligation to correct subsequently discovered defects, inaccuracy, or incompleteness.

11.5 RESPONSIBILITY FOR ERRORS. Contractor shall be responsible for its work and results under this Agreement. Contractor, when requested, shall furnish clarification and/or explanation as may be required by the City, regarding any services rendered under this Agreement at no additional cost to City. In the event that an error or omission attributable to Contractor occurs, then Contractor shall, at no cost to City, provide all necessary design drawings, estimates and other Contractor professional services necessary to rectify and correct the matter to the sole satisfaction of City and to participate in any meeting required with regard to the correction.

11.6 WAIVER. The City's waiver of any term, condition, breach, or default of this Agreement shall not be considered to be a waiver of any other term, condition, default or breach, nor of a subsequent breach of the one waived. The delay or failure of either party at any time to require performance or compliance by the other of any of its obligations or agreements shall in no way be deemed a waiver of those rights to require such performance or compliance. No waiver of any provision of this Agreement shall be effective unless in writing and executed by a duly authorized representative of the party against whom enforcement of a waiver is sought.

11.7 SUCCESSORS. This Agreement shall inure to the benefit of, and shall be binding upon, the parties hereto and their respective heirs, successors, and/or assigns.

11.8 NO ASSIGNMENT. Contractor shall not assign or transfer this Agreement or any rights hereunder without the prior written consent of the City and approval by the City Attorney, which may be withheld in the City's sole discretion. Any unauthorized assignment or transfer shall be null and void and shall constitute a material breach by the Contractor of its obligations under this Agreement. No assignment shall release the original parties from their obligations or otherwise constitute a novation.

11.9 COMPLIANCE WITH LAWS. Contractor shall comply with all Federal, State, County and City laws, ordinances, rules and regulations, which are, as amended from time to time, incorporated herein and applicable to the performance hereof. Violation of any law material to performance of this Agreement shall entitle the City to terminate the Agreement and otherwise pursue its remedies. Further, if the Contractor performs any work knowing it to be contrary to such laws, rules, and regulations Contractor shall be solely responsible for all costs arising therefrom.

11.10 ATTORNEY'S FEES. If any action at law or in equity is brought to

enforce or interpret the terms of this Agreement, the prevailing party shall be entitled to reasonable attorney's fees, costs, and necessary disbursements in addition to any other relief to which such party may be entitled.

11.11 INTERPRETATION.

11.11.1 Applicable Law. This Agreement shall be deemed an agreement and shall be governed by and construed in accordance with the laws of the State of California. Contractor agrees that the State and Federal courts which sit in the State of California shall have exclusive jurisdiction over all controversies and disputes arising hereunder, and submits to the jurisdiction thereof.

11.11.2 Entire Agreement. This Agreement, including any exhibits attached hereto, constitutes the entire agreement and understanding between the parties regarding its subject matter and supersedes all prior or contemporaneous negotiations, representations, understandings, correspondence, documentation, and agreements (written or oral).

11.11.3 Written Amendment. This Agreement may only be changed by written amendment executed by Contractor and the City Administrator or other authorized representative of the City, subject to any requisite authorization by the City Council. Any oral representations or modifications concerning this Agreement shall be of no force or effect.

11.11.4 Severability. If any provision in this Agreement is held by any court of competent jurisdiction to be invalid, illegal, void, or unenforceable, such portion shall be deemed severed from this Agreement, and the remaining provisions shall nevertheless continue in full force and effect as fully as though such invalid, illegal, or unenforceable portion had never been part of this Agreement.

11.11.5 Order of Precedence. In case of conflict between the terms of this Agreement and the terms contained in any document attached as an Exhibit or otherwise incorporated by reference, the terms of this Agreement shall strictly prevail. The terms of the City's Request for Proposals shall control over the Contractor's Proposal.

11.11.6 Construction. In the event an ambiguity or question of intent or interpretation arises with respect to this Agreement, this Agreement shall be construed as if drafted jointly by the parties and in accordance with its fair meaning. There shall be no presumption or burden of proof favoring or disfavoring any party by virtue of the authorship of any of the provisions of this Agreement.

11.12 TIME OF ESSENCE. Time is strictly of the essence of this agreement and each and every covenant, term, and provision hereof.

11.13 AUTHORITY OF CONTRACTOR. The Contractor hereby represents and warrants to the City that the Contractor has the right, power, legal capacity, and authority to enter into and perform its obligations under this Agreement, and its execution of this Agreement has been duly authorized.

11.14 ARBITRATION OF DISPUTES. Any dispute for under \$25,000 arising out of or relating to the negotiation, construction, performance, non-performance, breach, or any other aspect of this Agreement, shall be settled by binding arbitration in accordance with the Commercial Rules of the American Arbitration Association at Los Angeles, California and judgment upon the award rendered by the Arbitrators may be entered in any court having jurisdiction thereof. The City does not waive its right to object to the timeliness or sufficiency of any claim filed or required to be filed against the City and reserves the right to conduct full discovery.

11.15 NOTICES. Any notice or demand to be given by one party to the other must be given in writing and by personal delivery or prepaid first-class, registered or certified mail, addressed as follows. Notice simply to the City of Vernon or any other City department is not adequate notice.

If to the City:

City of Vernon
Attention: Freddie Agyin, Director of
Health and Environmental Control Dept.
4305 Santa Fe Avenue
Vernon, CA 90058

If to the Contractor:

Raftelis Financial Consultants, Inc.
Attention: Jennifer Porter, Principal Consultant
227 W Trade St #1400
Charlotte, NC 28202

Any such notice shall be deemed to have been given upon delivery, if personally delivered, or, if mailed, upon receipt, or upon expiration of three (3) business days from the date of posting, whichever is earlier. Either party may change the address at which it desires to receive notice upon giving written notice of such request to the other party.

11.16 NO THIRD PARTY RIGHTS. This Agreement is entered into for the sole benefit of City and Contractor and no other parties are intended to be direct or incidental beneficiaries of this Agreement and no third party shall have any right or remedy in, under, or to this Agreement.

11.17 TERMINATION FOR CONVENIENCE (Without Cause). City may terminate this Agreement in whole or in part at any time, for any cause or without cause, upon fifteen (15) calendar days' written notice to Contractor. If the Agreement is thus terminated by City for reasons other than Contractor's failure to perform its obligations, City shall pay Contractor a prorated amount based on the services satisfactorily completed and accepted prior to the effective date of termination. Such payment shall be Contractor's exclusive remedy for termination without cause.

11.18 DEFAULT. In the event either party materially defaults in its obligations hereunder, the other party may declare a default and terminate this Agreement by written notice to the defaulting party. The notice shall specify the basis for the default. The Agreement shall terminate unless such default is cured before the effective date of termination stated in such notice, which date shall be no sooner than ten (10) days after the date of the notice. In case of default by Contractor, the City reserves the right to procure the goods or services from other sources and to hold the Contractor responsible for any excess costs occasioned to the City thereby. Contractor shall not be held accountable for additional costs incurred due to delay or default as a result of Force Majeure. Contractor must notify the City immediately upon knowing that non-performance or delay will apply to this Agreement as a result of Force Majeure. At that time Contractor is to submit in writing a Recovery Plan for this Agreement. If the Recovery Plan is not acceptable to the City or not received within 10 days of the necessary notification of Force Majeure default, then the City may cancel this order in its entirety at no cost to the City, owing only for goods and services completed to that point.

11.19 TERMINATION FOR CAUSE. Termination for cause shall relieve the terminating party of further liability or responsibility under this Agreement, including the payment of money, except for payment for services satisfactorily and timely performed prior to the service of the notice of termination, and except for reimbursement of (1) any payments made by the City for service not subsequently performed in a timely and satisfactory manner, and (2) costs incurred by the City in obtaining substitute performance. If this Agreement is terminated as provided herein, City may require, at no additional cost to City, that Contractor provide all finished or unfinished documents, data, and other information of any kind prepared by Contractor in connection with the performance of Services under this Agreement. Contractor shall be required to provide such document and other information within fifteen (15) days of the request.

11.19.1 Additional Services. In the event this Agreement is terminated in whole or in part as provided herein, City may procure, upon such terms and in such manner as it may determine appropriate, services similar to those terminated.

11.20 MAINTENANCE AND INSPECTION OF RECORDS.

The City, or its authorized auditors or representatives, shall have access to and the right to audit and reproduce any of the Contractor's records to the extent the City deems necessary to insure it is receiving all money to which it is entitled under the Agreement and/or is paying only the amounts to which Contractor is properly entitled under the Agreement or for other purposes relating to the Agreement.

The Contractor shall maintain and preserve all such records for a period of at least three (3) years after termination of the Agreement.

The Contractor shall maintain all such records in the City of Vernon. If not, the Contractor shall, upon request, promptly deliver the records to the City of Vernon or reimburse the City for all reasonable and extra costs incurred in conducting the audit at a location other than the City of Vernon, including, but not limited to, such additional (out of the City) expenses for personnel, salaries, private auditors, travel, lodging, meals, and overhead.

11.21 CONFLICT. Contractor hereby represents, warrants, and certifies that no member, officer, or employee of the Contractor is a director, officer, or employee of the City of Vernon, or a member of any of its boards, commissions, or committees, except to the extent permitted by law.

11.22 HEADINGS. Paragraphs and subparagraph headings contained in this Agreement are included solely for convenience and are not intended to modify, explain or to be a full or accurate description of the content thereof and shall not in any way affect the meaning or interpretation of this Agreement.

11.23 ENFORCEMENT OF WAGE AND HOUR LAWS. Eight hours labor constitutes a legal day's work. The Contractor, or subcontractor, if any, shall forfeit twenty-five dollars (\$25) for each worker employed in the execution of this Agreement by the respective Contractor or subcontractor for each calendar day during which the worker is required or permitted to work more than 8 hours in any one calendar day and 40 hours in any one calendar week in violation of the provisions of Sections 1810 through 1815 of the California Labor Code as a penalty paid to the City; provided, however, work performed by employees of contractors in excess of 8 hours per day, and 40 hours during any one week, shall be permitted upon compensation for all hours worked in excess of 8 hours per day at not less than 1½ times the basic rate of pay.

11.24 EQUAL EMPLOYMENT OPPORTUNITY PRACTICES. Contractor certifies and represents that, during the performance of this Agreement, it and any other parties with whom it may subcontract shall adhere to equal employment opportunity practices to assure that applicants, employees and recipients of service are treated equally and are not discriminated against because of their race, religion, color, national origin, ancestry, disability, sex, age, medical condition, sexual orientation or marital status. Contractor further certifies that it will not maintain any segregated facilities. Contractor further agrees to comply with The Equal Employment Opportunity Practices provisions as set forth in Exhibit "C".

[Signatures Begin on Next Page].

IN WITNESS WHEREOF, the Parties have executed this Agreement as of the Commencement Date stated on the cover page.

City of Vernon, a California charter City
and California municipal corporation

Raftelis Financial Consultants, Inc.,
a North Carolina corporation

By: _____
Brian Saeki, City Administrator

By: _____

Name: Henrietta Locklear

Title: Senior Vice President

ATTEST:

By: _____

Yonnie Parker, Deputy City Clerk

Name: Christine McIntyre

Title: Chief Financial Officer

APPROVED AS TO FORM:

Zaynah Moussa, City Attorney

EXHIBIT A
CONTRACTOR'S PROPOSAL

City of Vernon

Solid Waste Management Consulting Services

PROPOSAL / MARCH 27, 2025



March 27, 2025

Dulce Gonzalez
Management Analyst
City of Vernon
4305 S. Santa Fe Avenue
Vernon, CA 90058

Subject: Proposal for Solid Waste Management Consulting Services

Dear Dulce Gonzalez:

Raftelis is pleased to submit this proposal in response to the City of Vernon's Request for Proposals for Solid Waste Management Consulting Services. We appreciate the opportunity to support the City in evaluating its current non-exclusive franchise system and developing a forward-thinking model that improves operational efficiency, enhances service accountability, and aligns with Vernon's regulatory and sustainability goals.

We understand the importance of this work and the complexity of Vernon's current system. With 16 permitted haulers serving a predominantly industrial customer base, the City requires a partner that understands how to balance business needs, service performance, environmental compliance, and policy development. Raftelis has successfully led similar initiatives across California and the U.S.—evaluating collection systems, designing franchise models, facilitating stakeholder and Council engagement, and supporting implementation through competitive procurement and transition management.

Our proposal outlines a clear, phased approach built around your goals and timeline. We are confident in our ability to deliver each task—on time and within budget—while providing the technical, legal, and engagement expertise needed to ensure project success. We are excited about the opportunity to work with Vernon and contribute to building a more transparent, effective, and future-ready solid waste program.

Thank you for considering our proposal. We look forward to the opportunity to serve the City of Vernon and welcome any questions you may have. Please feel free to contact me at 845.481.1321 or jporter@raftelis.com.

Sincerely,



Thierry Boveri, CGFM
Vice President (Authorized to bind)



Jennifer Porter
Principal Consultant (Contact Person)

Firm Headquarters: 227 W. Trade Street, Suite 1400, Charlotte, NC 28202

Firm Phone: 704.373.1199 / **Firm Email:** vendor@raftelis.com

Raftelis states that our proposal shall remain valid for a period of not less than ninety (90) days from the date of submittal.

INTRODUCTION

The Raftelis Advantage: Experience That Works for Vernon

Vernon isn't a typical city—and this isn't a typical project.

With a heavy industrial base, complex hauler ecosystem, and ambitious goals for accountability and environmental compliance, the City of Vernon needs more than a consultant. You need a *partner who can guide you from strategic evaluation through long-term implementation*—while building consensus and delivering results every step of the way.

At Raftelis, we bring that level of partnership. Backed by more than 190 experts and a track record of success with over 700 agencies just last year, we offer unmatched depth in *solid waste planning, franchise structuring, financial modeling, stakeholder engagement, and program execution*. Here's what sets Raftelis apart:

Strategic Leadership in Franchise Reform

We've helped dozens of communities transform complex hauler systems into efficient, accountable programs. Raftelis brings extensive experience evaluating and redesigning non-exclusive and hybrid franchise models, particularly in business-dense and industrial communities. *We understand how to analyze current capacity, improve competitiveness, and balance flexibility with oversight.* Whether Vernon maintains, modifies, or consolidates its system, we'll help you build a model that's cost-effective, enforceable, and future-ready.

Built for Projects with Depth and Longevity

Multi-year, multi-phase projects require serious horsepower. We're built for it. With the largest utility- and local government-focused consulting team in the nation, Raftelis can dedicate specialized experts to each phase of Vernon's project—from technical assessment and legal coordination to stakeholder outreach and contract implementation. You'll never be short on capacity, and you'll always have the right people in the room.

Defensible, Data-Driven Recommendations

When it's time to justify changes to Council or the business community, you'll be ready. Our recommendations are backed by robust data, environmental impact modeling, rate benchmarking, and legal defensibility. We're not just industry-informed—we're industry-shaping. Raftelis staff serve in leadership roles with SWANA, co-author utility finance best practices, and are recognized nationally for our solid waste policy work. And as a *registered Municipal Advisor*, we're fully qualified to provide financial recommendations that *comply with federal regulations and stand up to public scrutiny.*

California-Specific Knowledge, Industrial City Experience

We understand Vernon's reality—and your regulatory landscape. From SB 1383 compliance and edible food recovery mandates to commercial generator-focused rate systems, we've helped cities across California build solid waste programs that work for businesses, meet CalRecycle standards, and minimize risk. We're fluent in California law and have hands-on experience working with legal teams, haulers, and businesses to draft *enforceable, effective franchise agreements that align with local priorities.*

Engagement That Builds Buy-In from Business

Outreach isn't just a checkbox—it's a strategy. With 1,800+ businesses operating in Vernon, many of them high-volume generators, *effective engagement requires more than a public meeting.* Raftelis designs targeted, stakeholder-specific engagement strategies that elevate the right voices, gather meaningful feedback, and translate community input into actionable insights. *We help you build momentum, secure support, and get to "yes" faster—with fewer surprises.*

Tools Designed for Decision-Making and Accountability

You'll walk away with more than a report. You'll have tools you can use. We develop financial models, cost allocation tools, and transition tracking dashboards that your team can use to monitor performance, compare service models, and prepare for Council presentations. From Microsoft Excel to web-based platforms, our tools are built to be **transparent, replicable, and accessible** long after we're gone. We'll even help design *key performance indicators* and *compliance reporting systems* tailored to your new franchise framework.

From Strategy to Execution: We Stay With You

Planning is only the beginning. Implementation is where it counts. Raftelis will support Vernon through every stage of transition—helping draft the RFP and franchise agreement, facilitating proposer interviews, negotiating contracts, and guiding the hauler onboarding process. We've done this in cities with multiple legacy haulers, conflicting stakeholder interests, and complex legal environments. *We know what can go wrong—and how to make it go right.*

Why Choose Raftelis?

You need a partner who understands how to:

- Navigate the realities of an **industrial-focused, non-exclusive hauler environment**
- Align environmental, financial, and service-level goals
- Communicate clearly with businesses, staff, and elected officials
- Translate analysis into **adoptable policies and enforceable contracts**
- Support long-term implementation—not just short-term studies

Project Understanding

The City of Vernon is taking a proactive and strategic step toward improving the efficiency, accountability, and sustainability of its solid waste management system. Raftelis is excited for the opportunity to serve as your partner through this effort—not just as consultants, but as trusted advisors equipped to help you navigate complex challenges, make informed decisions, and implement a system that works for Vernon today and well into the future.

We understand that Vernon’s non-exclusive franchise model—with 16 permitted haulers and a heavily industrial customer base—requires a detailed evaluation to assess operational effectiveness, cost equity, customer satisfaction, and regulatory compliance. The City is seeking expert support to not only review current conditions but to recommend a viable path forward, design the appropriate procurement structure, secure stakeholder and Council alignment, and ultimately oversee a successful implementation of the selected model.

Raftelis brings the full range of experience and expertise required to deliver these outcomes. Our phased, task-based approach includes hauler interviews and data collection, benchmarking, financial and environmental modeling, stakeholder engagement, policy development, franchise agreement drafting, RFP support, and hands-on implementation assistance. Each step will be guided by clear milestones, rigorous quality control, and regular communication with City staff. With more than 190 consultants—many of whom are solid waste, finance, and engagement specialists—we have the resources to deliver high-quality results on time and within your identified budget. Our goal is not only to meet your expectations, but to help Vernon build a system that reflects your values, strengthens community trust, and delivers long-term value.

GENERAL SCOPE OF WORK

General Scope of Work

In brief summary, Raftelis understands the scope of work for each proposed Service Area as follows:

Task 1 - Evaluation of Current Non-Exclusive Franchise System (May 1, 2025 - August 31, 2025): We will conduct a comprehensive assessment of the City’s existing non-exclusive franchise system, examining hauler performance, customer satisfaction, rate structures, service quality, and regulatory compliance. This will include data collection from permitted haulers, customer surveys, and benchmarking against peer agencies to identify opportunities for improvement and inform future system design.

Task 2 - Report Development and Recommendations (September 1, 2025 - December 31, 2025): Using insights from the evaluation, we will develop a detailed report presenting solid waste service model options (e.g., exclusive, tiered, or enhanced non-exclusive). Each option will include financial, operational, and environmental impact analysis. We will recommend a preferred model tailored to Vernon’s needs, supported by a phased implementation roadmap.

Task 3 - Stakeholder Engagement (January 1, 2026 - March 31, 2026): We will design and facilitate a targeted stakeholder engagement process to validate the recommended model, solicit input from businesses and community members, and build support for implementation. Feedback gathered through public meetings, surveys, and interviews will be used to refine the proposed approach.

Task 4 - City Council Report (April 1, 2026 - June 30, 2026): Raftelis will prepare and deliver a comprehensive presentation of findings and recommendations to the City Council, ensuring elected officials understand the service model options, stakeholder feedback, and financial and operational implications. We will also support City staff with communication materials and presentation briefings.

Task 5 - RFP Development and Publication (January 1, 2027 - March 31, 2027): Based on the approved model, we will draft a detailed Request for Proposals and updated franchise agreement(s) with enforceable performance standards. We will work closely with City staff and legal counsel to ensure alignment with policy goals and regulatory requirements, and support outreach to potential proposers.

Task 6 - RFP Response Evaluation and Franchisee Selection (April 1, 2027 - June 30, 2027): We will facilitate a fair, transparent evaluation process of the proposals received, support proposer interviews, and assist the City in selecting one or more franchisees. This will include scoring proposals, leading negotiations, and preparing a final recommendation for Council approval.

Task 7 - Implementation of New Solid Waste Management System (July 1, 2027 - December 31, 2029): Raftelis will provide transition support as the new service model is launched, including hauler coordination, performance tracking, customer communication planning, and compliance monitoring. We will ensure the new system is implemented effectively and aligned with the City’s goals for service quality, efficiency, and regulatory compliance.

WORK PLAN

Work Plan

Our work plan is intentionally structured to function as a **strategic, sequential roadmap**—moving the City of Vernon from system evaluation to successful implementation with clarity, efficiency, and momentum. Each task is purposefully designed to build on the outcomes of the previous phase, ensuring a seamless flow of insights, decisions, and deliverables.

The process begins with a **comprehensive evaluation** of Vernon’s current system (Task 1), which provides the data foundation and operational understanding needed to shape informed, customized recommendations (Task 2). These recommendations serve as the framework for **meaningful stakeholder engagement** (Task 3), ensuring that community input is reflected in the final strategy. Once refined, the recommended path is presented to **City Council** for review and adoption (Task 4), providing policy direction and approval to proceed.

With Council’s guidance in place, we move into the **procurement and implementation phase**: Task 5 transforms policy into enforceable contract documents, while Task 6 manages the competitive selection process to identify the best partners. Finally, Task 7 puts the plan into action—guiding the transition to the new system, tracking performance, and ensuring a smooth rollout for the City, haulers, and customers alike.

This phased and interdependent approach ensures that **every phase informs and strengthens the next**, eliminating redundancies, reducing risk, and maintaining alignment with the City’s goals throughout the project. By design, this structure delivers not only high-quality outcomes, but also confidence in every step of the process.

Task 1: Evaluation of Current Non-Exclusive Franchise System

Timeline: May 1, 2025 – August 31, 2025

Objective: Assess the current solid waste franchise system to identify gaps, inefficiencies, regulatory risks, and opportunities to optimize service delivery and system oversight.

Methodology:

- Interview all 16 permitted haulers to gather operational and customer data.
- Analyze current rate structures, City franchise fees, and service profiles.
- Review hauler compliance reports and insurance coverage.
- Benchmark rate structures, customer satisfaction, and hauler turnover against at least five peer jurisdictions.
- Develop and administer a survey to Vernon businesses to assess satisfaction, hauler awareness, and perceived service quality.
- Evaluate extent of market competitiveness.

Meetings:

- Project kickoff meeting with City staff
- One-on-one sessions with each hauler
- Biweekly progress check-ins with City staff

Deliverables:

- Hauler Performance Report
- Benchmarking Report (Including Rate Comparisons)
- Customer Satisfaction Survey Results
- Franchise System Evaluation Memo

Interrelationship of Tasks: This task sets the foundation for the entire project. All subsequent work—including model recommendations (Task 2), stakeholder outreach (Task 3), and RFP development (Task 5)—relies on the data, insights, and findings generated here. A comprehensive and accurate evaluation ensures that future decisions are grounded in the current system’s realities.

Raftelis Advantage: We specialize in evaluating non-exclusive systems and know how to extract actionable insights from fragmented hauler markets. Our deep experience with similar

franchise reviews ensures Vernon receives a candid, data-driven diagnosis that leads directly to targeted, practical recommendations.

Task 2: Report Development and Recommendations

Timeline: September 1, 2025 – December 31, 2025

Objective: Translate the findings from Task 1 into a strategic, forward-looking report that recommends the optimal solid waste management model for the City of Vernon.

Methodology:

- Analyze Task 1 data to identify key trends, performance gaps, and opportunities.
- Compare Vernon’s system structure with those of 5–7 jurisdictions that have recently updated or restructured their programs.
- Assess financial, environmental, and service-level impacts of multiple collection models (e.g., exclusive, tiered, enhanced non-exclusive).
- Develop cost projections, environmental implications, and enforcement pathways for each option.
- Prepare an implementation roadmap for the preferred model, including resource needs and timeline.

Meetings:

- Strategy session to review alternatives
- Internal working group meeting to finalize recommendations

Deliverables:

- Comprehensive Solid Waste Evaluation and Recommendations Report
- Service Model Comparison Matrix
- Implementation Plan and Timeline

Interrelationship of Tasks: This task builds directly from Task 1’s findings and analysis. The recommended model will form the basis of stakeholder engagement (Task 3), Council approval (Task 4), and the RFP process (Task 5). By evaluating multiple paths and aligning them with Vernon’s regulatory and operational realities, Task 2 sets the strategic direction for the project’s second half.

Raftelis Advantage: Our unique strength lies in converting complex system data into clear, actionable alternatives that weigh costs, compliance, and customer experience. We don’t just recommend—we model, compare, and forecast so you know exactly what each option means for Vernon.

Task 3: Stakeholder Engagement

Timeline: January 1, 2026 – March 31, 2026

Objective: Gather meaningful input from key stakeholder groups—including businesses, residents, and environmental partners—to validate and refine the proposed service model.

Methodology:

- Identify and segment key stakeholders based on geography, generator type, and volume.
- Design and distribute tailored outreach materials (online surveys, presentations, flyers).
- Conduct a facilitated public meeting to share findings and collect feedback.
- Offer targeted one-on-one meetings or interviews for major business generators.
- Analyze responses and adjust recommendations as appropriate.

Meetings:

- Stakeholder focus session
- Outreach coordination meeting
- Feedback review session with City staff

Deliverables:

- Stakeholder Engagement Summary Report
- Revised Recommendation Brief (if needed)
- Public Comment Matrix

Interrelationship of Tasks: Task 3 serves as the critical link between analysis (Tasks 1–2) and policy direction (Task 4). Stakeholder feedback provides essential context that helps shape the final model recommendation and builds buy-in that will be essential during Council review and eventual implementation. The outcomes here directly impact messaging and decision-making in subsequent tasks.

Raftelis Advantage: We’re known for creating engagement processes that are inclusive, efficient, and politically astute. Our focus on industrial and commercial stakeholders gives Vernon an advantage in reaching the right people with the right message at the right time.

Task 4: City Council Presentation

Timeline: April 1, 2026 – June 30, 2026

Objective: Present findings and final recommendations to City Council in a clear, accessible, and persuasive format to facilitate policy decision-making.

Methodology:

- Refine messaging and visuals based on stakeholder feedback.
- Prepare a formal presentation and executive summary aligned with Council priorities.
- Support City staff with Q&A briefings, talking points, and communication materials.
- Attend Council meeting(s) to present and assist in discussion.

Meetings:

- Presentation planning and rehearsal
- City Council study session
- Staff debrief and follow-up

Deliverables:

- Council Presentation Deck
- Staff Report and Executive Summary

- Talking Points and FAQ Document

Interrelationship of Tasks: The Council presentation reflects the culmination of work done in Tasks 1–3. The recommendation presented here must be defensible, stakeholder-informed, and financially sound. Council feedback in this task will guide the final form of the RFP and franchise agreement developed in Task 5.

Raftelis Advantage: Our team excels at presenting complex operational and financial recommendations in ways that elected officials can easily grasp and champion. We help staff feel confident and well-prepared, which increases the likelihood of smooth Council approval.

Task 5: RFP Development and Publication

Timeline: January 1, 2027 – March 31, 2027

Objective: Develop and issue a Request for Proposals (RFP) and draft franchise agreement(s) aligned with the City’s selected solid waste management model.

Methodology:

- Translate the adopted model into enforceable RFP specifications.
- Draft franchise agreement terms with clear performance metrics and compliance provisions.
- Coordinate closely with City legal staff to ensure enforceability and risk mitigation.
- Develop proposer evaluation criteria and outreach strategy.
- Conduct pre-proposal meeting(s) to clarify expectations and maximize proposer quality.

Meetings:

- Legal coordination session
- RFP and contract review
- Pre-proposal conference

Deliverables:

- Final RFP and Franchise Agreement
- Evaluation Criteria and Scoring Matrix
- Distribution Plan and Hauler Outreach List

Interrelationship of Tasks: Task 5 relies on the Council-approved recommendations from Task 4 and codifies them into actionable contract documents. The clarity and strength of the RFP will directly impact the quality of responses evaluated in Task 6. Early planning here also sets expectations for future implementation and enforcement.

Raftelis Advantage: We have written dozens of successful solid waste RFPs and negotiated complex franchise agreements across California. Our blend of legal, financial, and operational expertise ensures Vernon gets a competitive process and a high-performing contract.

Task 6: RFP Response Evaluation and Franchisee Selection

Timeline: April 1, 2027 – June 30, 2027

Objective: Facilitate a transparent and defensible evaluation of proposals and assist with negotiations, contractor selection, and final agreement development.

Methodology:

- Coordinate and support the Evaluation Committee.
- Score proposals using objective, pre-approved criteria.
- Facilitate interviews and presentations with top proposers.
- Lead negotiations to refine contract terms.
- Prepare award recommendation report and assist with Council approval.

Meetings:

- Evaluation Committee kickoff
- Proposer interviews
- Negotiation strategy session
- City Council award meeting

Deliverables:

- Proposal Evaluation Report
- Final Scoring Matrix
- Draft Franchise Award Recommendation
- Negotiation Summary

Interrelationship of Tasks: Task 6 is where strategy becomes reality. The quality and clarity of work in Task 5 (RFP development) determines the caliber of responses received, while decisions made in Task 6 will shape the rollout strategy in Task 7. A defensible, transparent process here also ensures that the City can proceed without delay, risk of protest, or misalignment with Council’s direction from Task 4.

Raftelis Advantage: Our team’s experience evaluating hundreds of solid waste RFPs means we understand how to spot both value and red flags. We ensure fairness, transparency, and rigor throughout the selection process—backed by best practices in procurement and negotiation.

Task 7: Implementation of New Solid Waste Management System

Timeline: July 1, 2027 – December 31, 2029

Objective: Guide the City and selected hauler(s) through a smooth transition into the new service model while maintaining service continuity and achieving policy goals.

Methodology:

- Create a comprehensive implementation plan and timeline.
- Facilitate coordination between City staff and new hauler(s).
- Develop performance tracking tools, reporting templates, and monitoring dashboards.
- Support customer communication strategy (postcards, FAQs, multilingual notices).
- Monitor service roll-out, provide troubleshooting support, and recommend course corrections if needed.
- Conduct quarterly implementation review meetings and adjust KPIs as necessary.

Meetings:

- Transition planning workshop
- Monthly hauler check-ins
- Quarterly progress and performance review meetings

Deliverables:

- Final Implementation Plan and Timeline
- Franchisee Compliance Tracking Tools
- Customer Communication Templates
- Year-One Implementation Review Report

Interrelationship of Tasks: Task 7 brings the entire project to life—executing the plan developed through Tasks 2–6. A successful implementation depends on the clarity of franchise terms (Task 5), the quality of selected partners (Task 6), and the City’s ability to manage and monitor new service expectations. This task also provides real-world feedback that can inform future adjustments or refinements.

Raftelis Advantage: We stay involved beyond policy adoption—we embed with cities to make sure implementation works. Our operations, legal, and communications experts know how to manage transitions, track performance, and help haulers and staff meet expectations without disruption.

FEES AND COSTS

Fees and Costs

Raftelis proposes completing the full scope of services outlined in this proposal for a **total not-to-exceed fee of \$204,400**, inclusive of all labor, travel, meetings, and administrative costs. This budget reflects a **competitive blended hourly rate of \$280**, consistent with similar solid waste consulting efforts across California, and is structured in alignment with the City’s phased project timeline. Based on our extensive experience with multi-year waste planning and implementation projects, this budget includes ample time for project coordination, stakeholder engagement, internal quality control, and transition support. **We are fully confident in our ability to deliver all services within the proposed budget.** Any changes to scope or additional work will only be initiated upon mutual agreement in writing.

Task-Based Fee Schedule

Task	Task Name	Estimated Hours	Blended Rate	Not-to-Exceed Fee
Task 1	Evaluation of Current Non-Exclusive Franchise System	120 hours	\$280/hour	\$33,600
Task 2	Report Development & Recommendations	100 hours	\$280/hour	\$28,000
Task 3	Stakeholder Engagement	110 hours	\$280/hour	\$30,800
Task 4	City Council Report & Presentation	30 hours	\$280/hour	\$8,400
Task 5	RFP Development & Publication	110 hours	\$280/hour	\$30,800
Task 6	RFP Response Evaluation & Franchisee Selection	100 hours	\$280/hour	\$28,000
Task 7	Implementation of New Solid Waste Management System	160 hours	\$280/hour	\$44,800
Total		730 hours	\$280/hour	\$204,400

Annualized Cost Breakdown

Project Year	Tasks Included	Estimated Annual Cost
2025	Tasks 1 & 2	\$61,600
2026	Tasks 3 & 4	\$39,200
2027	Tasks 5 & 6	\$58,800
2028–2029	Task 7 (Implementation Support)	\$44,800
Total		\$204,400

Rate Transparency and Team Structure

This proposal is based on a **blended hourly rate of \$280/hour**, incorporating:

- **Project Manager / Senior Consultant** – Leading coordination, client communication, and strategic direction
- **Subject Matter Experts** – Specializing in solid waste finance, policy, franchise systems, and procurement
- **Analysts / Associates** – Supporting research, data analysis, stakeholder documentation, and engagement
- **Principal Oversight** – Providing quality control, executive-level insights, and final deliverable review

We prioritize senior-level staffing for complex and client-facing deliverables to ensure accuracy, quality, and alignment with Vernon’s strategic goals.

Value-Added Services (Included at No Additional Cost)

To further support successful implementation, Raftelis will also provide:

- A customizable franchisee performance dashboard template
- Sample hauler reporting and compliance tracking forms
- One post-implementation performance review session with City staff at the 6-month mark

ABILITY OF THE PROPOSER TO PERFORM

Project Team

The organizational chart below outlines our project structure. Our team has worked together on similar efforts throughout the country, ensuring a seamless, collaborative approach from start to finish. In the following pages, you'll find brief project descriptions and references highlighting the experience and capabilities we bring to this engagement. See Appendix for resumes.

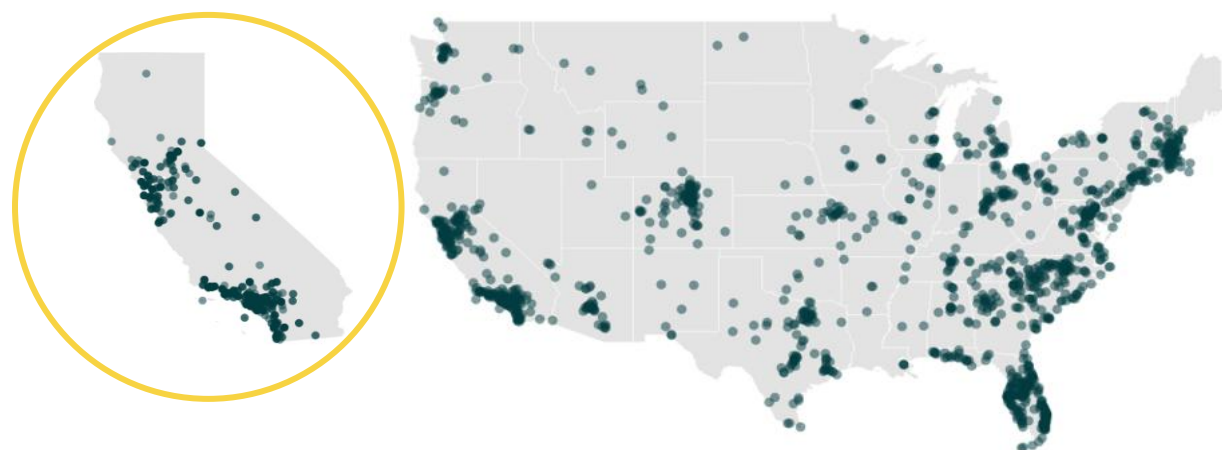


PROJECT TEAM HOUR ALLOCATION BY TASK

Staff	Role	T1	T2	T3	T4	T5	T6	T7	Hours
Morgan McCarthy	Project Manager / Legal	25	20	10	10	15	15	20	120
Jennifer Porter	Project Director	4	4	2	2	2	2	4	20
Thierry Boveri	Finance SME	15	10	-	-	5	5	5	40
Eugenia Manwelyan	Grant Funding SME	-	4	-	-	3	2	3	12
Gina DePinto	Stakeholder Engagement SME	-	2	25	4	-	-	-	31
Matt Wittern	Stakeholder Engagement SME	-	2	20	2	-	-	-	24
Jonathan Ingram	Operations SME	10	5	2	-	5	5	5	32
Scott Parker	Operations SME	11	8	1	-	5	6	6	37
Harold Mitchell	Solid Waste Operations	20	15	5	2	20	20	35	117
Sarah Neely	Finance Support	15	15	-	-	10	10	-	50
Claire Pritchard	Operations/Analyst	20	15	5	5	15	15	15	100
Total Task Hours		120	100	110	30	110	100	160	730

Past Performance

Raftelis has provided financial/organizational/technology assistance to utilities serving more than 25% of the U.S. population.



Partial list of California experience in the last 3 years

- Alameda County WD
- East Bay MUD
- City of Pomona
- East Palo Alto
- City of Hollister
- City of St. Helena
- City of Sonoma
- Rancho California WD
- East Valley WD
- Western Municipal WD
- City of Long Beach
- City of Lincoln
- City of Orange
- City of Chino
- City of Chino Hills
- City of San Francisco PUC
- City of Malibu
- City of Ontario
- City of Oxnard
- City of Thousand Oaks
- City of Huntington Beach
- East Orange County WD
- Madera County
- Municipal Water District of Orange County
- Sweetwater Authority
- Las Virgenes MWD
- City of Shafter
- Yorba Linda WD
- Elsinore Valley MWD
- City of San Clemente
- City of Santa Cruz
- City of Beverly Hills
- City of Simi Valley
- City of West Sacramento
- Rincon del Diablo WD
- San Juan Capistrano
- Santa Fe ID
- San Dieguito WD
- Channel Islands Beach Community Services District
- City of St. Helena
- Los Angeles DWP
- Los Angeles County Sanitation Districts

SOLID WASTE FRANCHISE SYSTEM DESIGN AND EVALUATION EXPERTISE

Relevant to: Tasks 1 & 2 – System Evaluation and Recommendations

Raftelis is a trusted leader in helping communities evaluate and enhance their solid waste systems. We specialize in designing franchise and in-house service models that meet local needs, improve efficiency, and support financial and environmental goals. Our team combines deep operational knowledge with strategic insight to analyze service levels, optimize vendor relationships, and ensure rate structures align with community priorities and regulatory requirements. From cost-of-service studies and benchmarking to contract review and compliance, we deliver practical, actionable solutions that promote transparency, equity, and long-term sustainability.

Leading this effort for Vernon is Morgan McCarthy, JD—a seasoned solid waste expert with a unique blend of legal, technical, and operational experience. Morgan has led more than 50 successful projects across California, supporting cities and counties through system evaluations, franchise transitions, RFP development, and contract negotiations. Her portfolio includes work in Carlsbad, Oceanside, Oakland, Contra Costa County, Kern County, and over 23 community service districts. Highlights of her work include:

- Drafting and negotiating agreements for collection, processing, and disposal of trash, recycling, food waste, and organics
- Leading procurement efforts for both franchise and in-house service models
- Guiding elected officials, legal teams, and stakeholders through complex transitions with clarity and confidence

Morgan brings the proven expertise and leadership needed to help Vernon build a solid waste system that is efficient, equitable, and future-ready.

Louisville-Jefferson County Metro Government KY

Reference: Pete Flood, Director Compliance & Enforcement / P: 502.574.1100 / E: pete.flood@louisvilleky.gov / **Key Personnel Involved:** Morgan McCarthy (PM), Jennifer Porter (PD), Harold Mitchell (Support) / ***Municipal Service Feasibility Study and Regional Benchmarking*** Raftelis is currently working with the Louisville Metro Waste Management District (WMD) to evaluate the feasibility of transitioning waste and recycling collection services from contracted providers to a municipally operated system. The study covers all major service streams—garbage, recycling, yard waste, and bulky waste—and includes a detailed cost-per-household analysis. Our approach incorporates benchmarking against peer jurisdictions, service level evaluation, and community impact assessments using statistically significant, ZIP-code-level data. The outcome will be a set of actionable recommendations designed to improve cost efficiency, equity, and service quality across the District. This engagement supports WMD's broader goals outlined in Kentucky's Solid Waste Management Five-Year Plan, positioning Louisville Metro for a more sustainable, accountable, and community-responsive waste system.

City of Albemarle NC

Reference: Ross Holshouser, Public Works Director / P: 704.984.9675 / E: rholshouser@ci.albemarle.nc.us / **Key Personnel Involved:** Morgan McCarthy (PM), Jennifer Porter (PD), Harold Mitchell (Finance), Jon Ingram (Op SME) / ***Collection Feasibility Study and Implementation Planning***. In 2024, the City of Albemarle engaged Raftelis to assess the feasibility of transitioning its contracted municipal solid waste, recycling, and construction and demolition (C&D) debris collection services to in-house operations. The project focuses on evaluating the operational, financial, and infrastructure requirements of such a transition, with the goal of enhancing service quality, long-term sustainability, and local control. Raftelis conducted a comprehensive review of the City's current waste management system, identifying gaps in service, estimating staffing and equipment needs, and developing detailed cost comparisons between contracted and municipal models. The team is also facilitating ongoing engagement with City officials and stakeholders to ensure alignment with Albemarle's strategic priorities. The project will culminate in a phased implementation plan and set of actionable recommendations designed to position the City for a smooth transition, improved service delivery, and lasting financial resilience.

Oklahoma City Water Utilities Trust OK

Key Personnel Involved: Thierry Boveri (PM), Sarah Neely (Support) / ***Franchise System Evaluation, Feasibility Study, and Long-Term Financial Planning***. The City of Oklahoma City provides solid waste services to approximately 645,000 residents through a hybrid model—contracted haulers serve 60% of customers, while in-house crews serve the remaining 40%. Services include refuse, recycling, bulky waste, and City-run programs such as neighborhood cleanups, HHW collection, rural recycling centers, and street sweeping. Raftelis was engaged to conduct a comprehensive cost-of-service study and 10-year financial forecast, addressing fleet replacement, capital needs, and operational costs. We recommended rate adjustments and reserve strategies and calculated program-level costs for bulky waste, recycling, illegal dumping, and street litter. Raftelis also conducted a feasibility analysis for bringing contracted services in-house, modeling staffing, routing, equipment, fuel, and communications impacts. Our data-driven insights supported Oklahoma City in evaluating service delivery options and planning for a more sustainable and efficient system.

EFFECTIVE STAKEHOLDER ENGAGEMENT AND OUTREACH STRATEGIES

Relevant to: Tasks 3 & 4 – Stakeholder Engagement and Council Presentation

Raftelis has led some of the most thoughtful and inclusive stakeholder engagement efforts in California and beyond. Our approach combines strategic messaging with robust data gathering to ensure communities are not only informed, but meaningfully involved in shaping system improvements. We've led successful bilingual outreach campaigns, developed micro-targeted messaging, and designed public input strategies that strengthen political support and project outcomes.

Madera County CA

Reference: Jared Carter, P.E., Deputy Public Works Director / P: 559.675.7811 / E: jcarter@maderacounty.com / **Key Personnel Involved:** Thierry Boveri (PM), Sarah Neeley (Support), Matt Wittern (Engagement Lead). Raftelis led a comprehensive outreach campaign to support a solid waste system evaluation, combining data analysis with deep engagement. We designed bilingual digital campaigns, conducted 12 interviews, launched a microsite, and hosted four public meetings—helping the County navigate controversial rate changes and service policies. The Board of Supervisors unanimously approved our recommendations with no public opposition, due to the trust and transparency built during the process.

City of Santa Cruz CA

Key Personnel Involved: Gina DePinto (PM), Matt Wittern (Support). We partnered with the City to explain necessary water rate increases through multilingual messaging, interactive workshops, and targeted digital outreach. This proactive communication strategy improved public understanding and built trust around rate decisions.

City of West Sacramento CA

Key Personnel Involved: Gina DePinto (Lead). To support a utility rate study, we implemented a communications plan centered on equity and accessibility, using neighborhood events, hybrid meetings, and messaging in English, Spanish, and Russian. These efforts built foundational trust that led to the City's strategic pause and later resumption of the rate process.

SOLID WASTE FINANCIAL FORECASTING, RATE-SETTING, AND BENCHMARKING

Relevant to: All Tasks – Particularly foundational for Tasks 1, 2, 5, and 6

Raftelis brings unmatched experience in developing cost-of-service models, rate studies, and long-range financial plans. Our models are trusted across California and nationally, used by agencies to inform policy, ensure fairness, and maintain compliance with SB 1383, Prop 218, and more.

City of Oxnard CA

Reference: Brian Yanez, Asst Public Works Director / P: 805.200.5412 / E: brian.yanez@oxnard.org / **Key Personnel Involved:** Thierry Boveri (PM/ Finance Lead), Sarah Neely (Finance Support). The City of Oxnard, serving over 40,000 customers and operating the Del Norte Regional Recycling and Transfer Station, processes nearly 295,000 tons of waste annually. Facing rising costs and regulatory pressures, the City engaged Raftelis to conduct its first cost-of-service analysis in over a decade and a solid waste impact fee study.

Our work evaluated funding strategies for fleet and facility upgrades and developed a five-year financial plan and rate model aligned with SB 1383 requirements. We introduced equitable, cost-based rate structures across all customer classes and ensured adequate reserves. With this foundation, Oxnard is set to present a financially sustainable, regulation-ready rate plan to City Council in FY 2025.

City of Lincoln CA

Key Personnel Involved: Thierry Boveri (PM/ Finance Lead), Sarah Neely (Finance Support). The City of Lincoln provides solid waste collection to over 50,600 customers through a one-bin system combining garbage, recycling, and organics. Materials are processed at WPWMA's mixed-waste MRF and landfill. To support financial stability and compliance with SB 1383 and fleet electrification goals, the City engaged Raftelis to develop a multi-year financial plan and conduct a cost-of-service and rate study. We built a customized, scenario-based model to evaluate rate alternatives, capital planning, routing changes, and fleet needs. Raftelis delivered a five-year rate plan focused on full cost recovery, reserve building, and adaptability. We also benchmarked peer rates and prepared Proposition 218-compliant materials. The final plan advanced Lincoln's goals of sustainability, equity, and simplicity.

Seattle Public Utilities WA

Key Personnel Involved: Jennifer Porter (PD), Eugenia Manwelyan (PM). Raftelis played a key role in five comparative reports for Seattle Public Utilities (SPU) which tasked with managing the City of Seattle's water and waste resources to promote the well-being of its residents, the environment, and the local economy. SPU manages a wide range of essential services for Seattle's 1.4 million residents, including Solid Waste Management, which encompasses collecting, transferring, processing, and disposing of garbage, recycling, compost, and other waste materials generated by residential, multifamily, commercial, and self-haul customers. Raftelis is currently working with SPU on a Solid Waste Benchmarking Research and Report that will help SPU decrease the waste stream, decrease garbage can size, and responded to expected changes in housing density. This report uses benchmarking and best practices in order to help SPU develop specific strategies and programs to meet its goals. Topics covered include: bulky and special waste, waste management for increased urban density, managing waste at special events, trash compaction, and transparent customer billing.

Hillsborough County FL

Key Personnel Involved: Thierry Boveri (PM/ Finance Lead), Sarah Neely (Finance Support). Raftelis partnered with Hillsborough County to develop a comprehensive six-year financial forecast and revenue sufficiency analysis for its Solid Waste Division, covering both disposal and collection operations. The study supported long-term fiscal health, infrastructure reinvestment, and strategic rate design. Key tasks included analyzing waste flow and revenue by type and source, forecasting customer growth and waste generation, projecting operating and capital expenses, and designing equitable rates based on cost-of-service principles. Raftelis also prepared board-ready deliverables such as assessment resolutions, fee schedules, and financial models. We continue to support the County with annual model updates to guide budgeting and ensure alignment with its solid waste business plan—helping maintain a fiscally sound, efficient, and forward-looking program.

PROCUREMENT AND CONTRACTING FOR SOLID WASTE SERVICES

Relevant to: Tasks 5 & 6 – RFP Development and Evaluation

Raftelis has deep experience in developing solid waste RFPs and facilitating hauler selection processes. Our procurement support includes drafting clear scopes of work, evaluation criteria, performance metrics, and stakeholder engagement to ensure a smooth, defensible process.

Metropolitan Government of Nashville and Davidson County TN

References: Amanda Deaton-Moyer, Metro Finance Department, Asst Director

/ P: 615.862.4782 / E: amanda.deaton-moyer@nashville.gov / **Key Personnel Involved:** Scott

Parker (Lead), Harold Mitchell (Support). The Metropolitan Government of Nashville and Davidson County engaged Raftelis to evaluate the structure, capacity, and strategic direction of its solid waste services, with the goal of establishing a stand-alone Solid Waste Department. Historically housed within Public Works and later Metro Water Services, Waste Services needed a governance structure aligned with the City's ambitious Zero Waste Master Plan adopted in 2021. Raftelis conducted a comprehensive organizational assessment focused on aligning staffing, funding, and operational frameworks with Nashville's zero waste goals. We delivered two key outputs: (1) A memo to City Council recommending the creation of a new Director of Solid Waste position; and (2) A strategic report outlining a future-ready organizational structure, cost-of-service financial model updates, and prioritized actions for department launch and early success. Additionally, Raftelis supported Metro Water Services in designing and analyzing two large-scale customer satisfaction surveys, each with over 5,000 responses. The surveys provided valuable insights into public perceptions, helping MWS evaluate the effectiveness of recent service changes and reinforcing their commitment to continuous improvement and public transparency.

City of Memphis TN

Reference: Philip Davis, PG, Solid Waste Director / P: 901.636.6872 / E:

philip.davis@memphistn.gov / **Key Personnel Involved:** Harold Mitchell (Support). For nearly a decade, Raftelis has served as a trusted advisor to the City of Memphis Solid Waste Division, supporting over 200,000 service points across garbage, recycling, and bulk waste collection. Our partnership began with an evaluation of bulk waste service delivery options, leading to the development of a comprehensive multi-year rate plan that included cost benchmarking, operational revenue analysis, and full cost recovery modeling. Raftelis created a dynamic financial model incorporating baseline cost updates and scenario planning, enabling Memphis to make informed decisions about service levels and long-term sustainability. As customer demands, costs, and Council priorities have evolved, Raftelis has continued to support the Division in addressing funding challenges—most recently assisting with a new rate strategy to replenish depleted reserves in the solid waste enterprise fund. Beyond rate-setting, Raftelis provides monthly budget tracking, financial analysis, and support for the Division's annual budget process, including redline/blackline reviews. We also advise on enhanced service delivery strategies, particularly around bulk waste collection and city beautification. This enduring relationship demonstrates Raftelis' commitment to advancing Memphis' operational excellence, financial resilience, and community responsiveness.

IMPLEMENTATION PLANNING AND SYSTEM TRANSITION SUPPORT***Relevant to: Task 7 – Implementation of New Solid Waste Management System***

Raftelis goes beyond planning—we guide our clients through seamless transitions from concept to execution. Whether launching a new franchise agreement, transitioning to in-house services, or rolling out new customer billing systems, we provide comprehensive support that includes vendor onboarding, operational logistics, staff training, customer communications, and post-launch troubleshooting. Our experience ensures that new systems are implemented on time, within budget, and with minimal disruption.

Montgomery County Environmental Services OH

Raftelis partnered with Montgomery County to modernize its solid waste billing system, leading the design and implementation of the Montgomery County Annual Property Charge (MCAPC). This parcel-based solution connects hauler-reported service volumes directly to property billing, improving accuracy and efficiency. Raftelis oversaw the full 2023 launch—including system integration, stakeholder outreach, and customer support—and continues to provide frontline service. With only 150 inquiries after rollout, the transition was smooth and well-received. We also resolved business billing issues and staffed a support center for three months post-launch. The project highlights our ability to deliver complex operational changes with precision, responsiveness, and long-term impact.

STATE OF CALIFORNIA)
) ss
COUNTY OF LOS ANGELES)

- a. Did not directly or indirectly, induce or solicit anyone else to submit a false or sham bid/proposal;
- b. Did not directly or indirectly, collude, conspire, connive or agree with anyone else that said bidder or anyone else would submit a false or sham bid/proposal, or that anyone should refrain from bidding or withdraw his/her bid/proposal;
- c. Did not, in any manner, directly or indirectly seek by agreement, communication or conference with anyone to raise or fix the bid/proposal price of said bidder or of anyone else, or to raise or fix any overhead, profit or cost element of his/her bid/proposal price, or of that of anyone else;
- d. Did not, directly or indirectly, submit his/her bid/proposal price or any breakdown thereof, or the contents thereof, or divulge information or data relative thereto, to any corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof, or to any individual or group of individuals, except the City of Vernon, or to any person or persons who have a partnership or other financial interest with said bidder in his/her business.

Date: March 27, 2025

APPENDIX: RESUMES

Jennifer Porter

PROJECT DIRECTOR

Principal Consultant

ROLE

Jennifer will provide input and guidance as a Subject Matter Expert for the sustainability components of this project and work at the direction of Morgan.

PROFILE

Jennifer is a planning leader with more than 20 years of experience in government and private sector sustainability, circularity and solid waste/sustainable materials management initiatives. Jennifer has demonstrated team building skills and has led client projects in-person and virtually in 18 states and territories in the US and internationally, as well as with one of the world's largest retail brands. A Certified Practitioner in Zero Waste Principles/Practices, Jennifer's specializations include sustainability, zero waste, circular economy, solid waste, sustainable materials management, communications and team building. Skilled in program development, project management and scenario evaluation, Jennifer has worked on dozens of complex public- and private-sector client projects. She has also held past leadership positions with the Clean Cities Coalition and the Association of Oregon Recyclers and is the author of more than 25 published industry articles/speaking engagements promoting thought leadership.

KEY PROJECT EXPERIENCE

Orange County (NC): Road to Zero Waste Plan

Jennifer was project manager leading the team developing a long-term solid waste master plan, *Road to Zero Waste Plan*, aiming to identify a sustainable business model for managing waste that considers the



Professional History

- Raftelis: Principal Consultant (2024-present)
- GBB: Chief Operating Officer (2023-2024); Senior Vice President (2022-2024); Vice President (2020-2022); Senior Project Manager (2017-2020); Associate (2016-2017)
- Rivertown Composting: Chief Operating Officer (2014-2016)
- Healthy Buildings: Manager of Corporate Sustainability (2013-2014)
- Pike/Wayne Workforce: Director (2008-2013)
- City of Portland, Bureau of Planning and Sustainability: Conservation Program Coordinator (2002-2008)

Education

- Master of Urban and Regional Planning - Portland State University (2003)
- Bachelor of Arts in Psychology - Wells College (1998)

Certifications

- OSHA 30-Hour Construction
- SWANA / CRRA Certified Practitioner in Zero Waste Principles & Practices

financial, social, and environmental impacts on the community while setting forth the future programs, initiatives, facilities, and infrastructure needed to reach the plan goal of zero waste by 2045. The County moved to implementation with both a short- and long-term path forward. Engaging traditionally marginalized groups was mission critical for this project and the outreach included a farmer's market blitz, one-on-one meetings, engaging signage and materials, as well as an online community survey and on-site meeting interpreters in English, Spanish, Burmese and Mandarin.

Confidential Client (CA): Response to Municipal RFP for Solid Waste

For a confidential regional private-sector client, Jennifer was project manager for the preparation of a proposal in response to a public procurement for a 10-year franchise collection and processing (residential, multifamily, and commercial) services contract, competently completing tasks in a time-sensitive manner.

Professional Memberships

- American Planning Association (APA)
- Climate & Energy Working Group of the American Sustainable Business Network
- International Society of Sustainability Professionals
- Solid Waste Association of North America – Sustainable Materials Management Advocacy Committee

Morgan McCarthy JD

PROJECT MANAGER

Manager



PROFILE

With over **18 years of experience** in solid waste, recycling, yard waste, and food waste management across public and private sectors, Morgan McCarthy is a recognized leader in the industry. She has a proven track record of designing and implementing innovative and cost-effective solutions to complex environmental challenges for cities, counties, and states.

Morgan's expertise includes franchise agreement drafting and negotiation, RFP development, municipal code drafting, waste audits, feasibility studies, and regulatory compliance. She has delivered measurable results for a wide range of clients by developing sustainable strategies, improving operational efficiency, and ensuring alignment with local and state regulations. Her leadership and analytical skills make her uniquely qualified to guide the County toward achieving its waste management goals.

FEATURED EXPERIENCE

- Directed 56 high-impact projects, providing tailored solutions in waste audits, franchise agreements, RFP development, financial analyses, strategic planning, and management consulting services to municipalities throughout California.
- Developed and negotiated comprehensive agreements for solid waste, yard and food waste, and recycling collection, processing, and disposal. Delivered successful outcomes for diverse clients, including Taft, Carlsbad, Oceanside, Dublin, Oakland, Contra Costa County, Kern County, San Luis Obispo County, and over 23 community service districts.
- Created and released RFPs for material collection, processing, and disposal. Evaluated proposals,

Professional History

- Raftelis: Manager (2024-present)
- GBB: Project Manager (2022-2024)
- HF&H: Project Manager (2019-2022)
- MuniEnvironmental: Project Manager (2015-2019)
- EDCO: Director of Special Projects (2014-2015)
- Rent-a-Bin: Facilities Director (2006-2012)

Education

- Juris Doctor - Thomas Jefferson School of Law (2014)
- Bachelor of Science in Computer Science, minor in Business, Magna Cum Laude - Liberty University (2007)

Certifications

- SWANA / CRRA Certified Practitioner in Zero Waste Principles and Practices (2023)
- SWANA Certification for Integrated Solid Waste Management (2023)
- Project Management Professional (PMP) In Progress

Professional Memberships

- SWANA

negotiated complex contract changes, and provided actionable recommendations to help cities and counties select the best service providers.

Morgan's ability to blend technical expertise with strategic vision and collaboration ensures effective, sustainable solutions for her clients. Her experience working with a broad range of stakeholders positions her as a trusted partner in driving successful outcomes for complex waste management initiatives.

Thierry Boveri CGFM

FINANCE SME

Vice President

PROFILE

Thierry is a Vice President with Raftelis and brings a client focused approach with a desire to add value through creative problem solving and attention to detail. Thierry is a Certified Government Financial Manager (CGFM) and leads our firm's solid waste financial planning and cost of service practice. He customarily performs engagements within California and maintains west coast hours of operations for such engagements. He has served over 65 local governments, including many he has served on an on-going basis since he began his career. Thierry also has significant experience in the performance of financial feasibility and disclosure reports totaling over \$2 billion in proceeds issued through the traditional bond market, state revolving, and bank loans. His solid waste technical expertise includes:

- Long-Range Financial Modeling / Planning in Support of Master Plans
- Solid waste collection and disposal cost of service and rate studies
- Assistance in formation of Solid Waste Enterprise Fund and development of residential assessments
- Triple Bottom Line (TBL) Economic Analyses including financial, environmental, and social components
- Financial and economic evaluations of solid waste system operations
- E.g., full and marginal cost evaluations, cost benefit analyses, Landfill financial assurance, revenue enhancements (host fees, out-of-county rates, etc.), recycling market evaluations and other analyses.
- Landfill capacity utilization and closure and post-closure care financial assurance
- Review of contractual arrangements (e.g., evaluation of collection hauler bids / contracts)
- Assistance in development of municipal interlocal agreements
- Assistance in feasibility studies in the issuance of debt (i.e., Bond Feasibility studies) and assistance in development of Bond Resolution / Trust Indenture agreements



Professional History

- Raftelis Board of Director (2023 – Present)
- Raftelis: Vice President (2022-present); Senior Manager (2019-2021); Associate, PRMG (2005-2019)

Education

- Bachelor of Arts in Economics; Bachelor of Arts in International Business - Rollins College (2005)

Certifications

- Certified Government Financial Manager, No. 15483

Professional Memberships

- Solid Waste Association of North America: Finance & Planning Committee
- AWWA: Rates & Charges Committee
- WEF: Utility Management Committee
- Government Finance Officers Association

Thierry is an active member of several industry associations, including SWANA, and has been a primary author to several publications and a featured speaker at several conferences including *Solid Waste Legislation and Policies Panelist* at the 2020 national Swanapalooza Virtual Conference, *Landfill Topics* panel discussion panelist 2021 SWANA Spring Conference. He last presented on the “*Top 5 Keys to Successful Financial Planning for Solid Waste Mangers*” at the 2021 SWANA Wastecon and “*MRF Funding Roadmap for Local Governments*” at the 2022 SWANA Wastecon.

Eugenia Manwelyan

GRANT FUNDING SME

Manager

PROFILE

Eugenia is a well-versed planning practitioner with 15 years of experience in sustainability, resilience, community engagement, and environmental justice. She has occupied a wide range of multi-disciplinary roles as a consultant, county government senior planner, non-profit executive director, and visiting professor at Columbia University. She has implemented projects ranging from food waste recovery and community solar to circularity and climate resilience.

Eugenia has an up-to-date understanding of the newly available federal funding resources for environmental infrastructure and has extensive experience matching these resources with high impact projects that solve complex problems. She has helped public and private sector clients navigate and apply for grants, loans, and newly available tax credits. Eugenia has given talks and published articles about operationalizing equity, leveraging public private partnerships, and using federal resources to build climate resilient infrastructure.

PROJECT LIST

- Metro (OR) – Bulky waste collection study and pilot program development
- City of Falls Church (VA) – Twenty-year solid waste management plan
- Calaveras County (CA) – Integrated solid waste management system review, fee study, grant writing
- Campbell County (VA) – Solid waste disposal option review and five-year tactical plan
- Kent County (MI) – Grant writing
- National Energy USA – Grant research and writing
- Dem-Con Companies, Ramsey/Washington Recycling & Energy Board (MN) – Grant research



Professional History

- Raftelis: Manager (2024-present)
- GBB: Project Manager (2020-2024)
- Sullivan County, NY: Senior Planner (2018-2020)
- Eco Practicum: Founding Executive Director (2011-2015)
- Columbia University: Visiting Professor (2013-2015)

Education

- Master of Science, Urban Planning - Columbia University (2011)
- Bachelor of Arts, International Development - McGill University (2006)

Certifications

- OSHA General Industry

Professional Memberships

- American Planning Association (APA)
- American Sustainable Business Network (ASBN): Circular Economy Working Group
- Solid Waste Association of North America (SWANA): Diversity, Equity, and Inclusion Committee
- American Society of Adaptation Professionals

and writing; federal resource strategy to access technical assistance, loans, tax credits

- Confidential Client – Commodity pricing and waste shed analysis
- Charlottesville (VA) – Landfill diversion and waste reduction plan
- Southeast Berrien County Landfill Authority (MI) – Technical assistance for business growth strategy
- Charles County (MD) – Twenty-year solid waste management plan
- Central Virginia Waste Management Authority (VA) – Strategic plan and funding
- Barnstable County (MA) – Public outreach to increase waste diversion and recycling
- James City County (VA) – Waste collection and consolidation study
- Household & Commercial Product Association and the Can Manufacturers Institute (USA) – Research and technical support for the Aerosol Can Recycling Initiative

Gina DePinto APR

STAKEHOLDER ENGAGEMENT SME Manager

PROFILE

Gina is an award-winning and accredited public relations professional with more than 34 years of experience and leadership in crisis communications, community outreach, advocacy, stakeholder engagement, marketing, and media relations in the public and private sectors. Gina's leadership experience includes communications program management for \$2 billion in public transportation and water infrastructure projects, including the Port of Long Beach Gerald Desmond Bridge Replacement Project and the Orange County Groundwater Replenishment System. The GWRS has been covered by international media including National Geographic, Wall Street Journal, New York Times, BBC, CNN, and NPR to name a few. Prior to joining Raftelis, Gina served the residents of Santa Barbara County as the first executive Communications Manager in the county government's 171-year history. She advised the County Executive Team on strategic communications programs, crisis communication, media relations, issues management, internal communications, branding and culture change. During her tenure, the County Emergency Operations Center was activated 19 times and included two federally declared disasters, a global pandemic, two mass casualty incidents, and a \$2M embezzlement in the Public Works Department. Born and raised in Phoenix, Arizona, DePinto served as a public information officer for the City of Phoenix, public relations director for Farnam Companies, Inc. (animal health and pet products), and coordinated publicity for Olympic and World Champion figure skater Dorothy Hammill prior to relocating to California. Gina earned a bachelor's degree in organizational communication from Arizona State University, is accredited in public relations from the Public Relations Society of America (PRSA), and holds certificates in public participation from the International Association for Public



Professional History

- Raftelis: Manager, Strategic Communications (2022-present)
- County of Santa Barbara: Communications Manager (2016-2022)
- Westbound Communications: Account Director (2013-2016)
- Orange County Water District: Communications Specialist (2006-2013)
- Bylines Public Relations & Marketing: Owner/Principle (1996-2006)
- Farnam Companies: Public Relations Director (2000-2003)

Education

- Accredited in Public Relations – PRSA (2013)
- Bachelor of Arts in Organizational Communication - Arizona State University (1987)

Professional Memberships

- Public Relations Society of America
- California Association of Public Information Officials
- Municipal Management Association of Southern California

Participation (IAP2). Gina is currently a member of the California Association of Public Information Officials (CAPIO), Public Relations Society of America (PRSA), and the Municipal Management Association of Southern California (MMASC).

KEY PROJECT EXPERIENCE

Orange County (CA): Infrastructure Outreach and Communications For Water Reuse Project;
Groundwater Contamination Outreach; Water Education and Outreach Program Development;
Strategic Media Relations for Groundwater Replenishment System

Matt Wittern APR, PMP

STAKEHOLDER ENGAGEMENT SME Manager

PROFILE

Matt has a 25+ year public relations career serving clients and customers in the local government, public utility, engineering, and construction sectors. He excels at designing and implementing strategic communications campaigns that incorporate stakeholder input to inform, advocate and achieve behavior change. His specialty is successfully translating complex subjects and concepts into messages that are easily understood by target audiences. At Raftelis he manages strategic communications planning and implementation, as well as stakeholder engagement initiatives. Prior to joining Raftelis, Matt managed a variety of public affairs efforts at Denver Water, which included designing the public engagement and public information strategies for nearly a billion dollars' worth of infrastructure projects, spearheading the public process for the utility's policy decision regarding Community Water Fluoridation, and led development of processes to gain stakeholder support for preventative maintenance on critical infrastructure. He earned a B.A. in journalism, is Accredited in Public Relations (APR) from the Public Relations Society of America (PRSA) and achieved status as a Project Management Professional (PMP) from the Project Management Institute. Matt has presented at national conferences including the American Water Works Association's ACE and the City-County Communications and Marketing Association's (3CMA) Annual Conference. Matt's work has earned prestigious Gold Pick Awards from the Colorado Chapter of PRSA and SAVVY Awards from 3CMA.



Professional History

- Raftelis: Manager (2023-present); Senior Consultant (2019-2022)
- Denver Water: Senior Community Relations Specialist/Communications Manager (2015-2019)
- Communication Infrastructure Group: Counselor (2006-2015)
- CollegeInvest: Marketing Communications Manager (2005-2006)
- Transportation Expansion (T-REX) Project: Community Relations Manager (2002-2005)
- LawsComm: Client Service Coordinator (1998-2002)

Education

- Bachelor of Arts in Technical Journalism (Public Relations) - Colorado State University (1999)

Professional Memberships

- Public Relations Society of America: Accredited in Public Relations (APR)
- Project Management Institute - Project Management Professional (PMP)
- International Association of Public Participation (IAP2) - Certified in Public Participation
- WEF
- AWWA

KEY PROJECT EXPERIENCE**Madera County (CA): Solid Waste Management Study Stakeholder Engagement and Communications**

Matt served as lead strategist and facilitator for this solid waste management study in 2023. There were significant challenges, as a highly vocal and organized group in the east part of Madera County had sued the government about past solid waste management practices. Using stakeholder engagement techniques, Matt and the team at Raftelis brought all stakeholders to the table for discussions on what the best solution would be for them – providing value for the dollar, while also conforming to new more stringent state regulations. The study also benefitted from strong key messaging and use of myriad county-owned publications and earned media coverage. In the end, Raftelis was able to show where input from stakeholders greatly influenced the recommendations of the study, which was adopted by the County Board of Supervisors.

Jonathan Ingram

OPERATIONS SME

Vice President

PROFILE

Jonathan has 20 years of experience in management consulting and local government management, most recently as budget manager in the City of Cincinnati, Ohio, budget office. Before that, Jonathan served as a management consultant and worked in the city manager's office for the City of Highland Park, Illinois.

Jonathan is a skilled financial analyst in the areas of budget and revenue analysis and has led our work with fiscally distressed communities, supporting their efforts to restore operational and financial sustainability. Additionally, he has extensive experience as a management and operations consultant to local governments in the United States and abroad.

As a consultant, Jonathan has completed operations reviews for over 200 local governments and has helped to improve service delivery for a broad range of departments – from police to public works. He has developed staffing and deployment plans for city operating departments, analyzed and facilitated intergovernmental consolidations, helped local governments develop custom performance management systems, and facilitated the development of long-term strategic plans and financial models.

Jonathan's areas of expertise are in local government budgeting and finance, operations analysis, project management, public safety staffing analysis, process improvement, and performance measurement. He is adept at quickly assessing strengths and opportunities within a municipality, analyzing and developing actionable recommendations for improvement, and



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)

communicating findings and next steps to a wide variety of audiences, including staff, elected officials, and the public.

During his tenure with the City of Cincinnati, Jonathan managed the development and administration of a \$1 billion operating budget. He also conducted special analysis projects, served on the City's collective bargaining team, and co-managed the implementation of an enterprise budget system.

Jonathan earned a bachelor's degree in political science from Aurora University and a master's degree in public administration from Northern Illinois University. He is a member of the International City/County Management Association and the Ohio City/County Management Association.

J. Scott Parker

OPERATIONS SME

Vice President



PROFILE

Scott has over 20 years of experience in local government, utility management, and private consulting. Prior to joining Raftelis, he served as the Asset Manager for KC Water in Kansas City, Missouri. Before KC Water, he served as the Assistant Director for Public Works in both Olathe and Lenexa, Kansas, where he led the finance, data management, solid waste, field operations (streets, utilities, traffic), and communications divisions, and managed multiple Police, Parks, and Fire Department capital projects. He also has private consultant experience providing capital planning, financial analysis, data system, asset management, and interim-executive services to Ft. Smith, Arkansas; Jackson, Mississippi; and Kansas City, Kansas, all of whom had signed Federal Consent Decrees with the Environmental Protection Agency (EPA).

Scott's wide range of experience has given him extensive leadership and technical expertise in the fields of asset management, information technology, general management, and operations in multiple domains. This has allowed him to design, develop, and implement asset management programs in three (3) communities based on capital optimization strategies and asset management best practices as defined in ISO 55000 and 55001 and ISO 31000 standards and other industry criteria. As an Asset Management practitioner, Scott has used his understanding of the field to design teams that combine the best theoretical concepts of asset management with the opportunities and cultural circumstances specific to the organizations for which he has worked. He

Professional History

- Raftelis: Vice President (2025-present); Senior Manager (2022-2024)
- KC Water: Utility Officer – Asset Manager (2018-2022)
- Burns and McDonnell: Engineering Manager (2015-2018)
- City of Olathe, KS: Assistant Director of Public Works (2011-2015)
- City of Lenexa, KS: Assistant Director of Public Works/Assistant to the City Manager (2006-2011)
- City of Kansas City, MO: Budget and Finance Analyst (2003-2006); L.P. Cookingham Management Fellow (2002)

Education

- Master of Public Administration – University of Missouri (2004)
- Master of Arts, History – University of Arkansas-Fayetteville (2000)
- Bachelor of Arts in History - Graceland University (1997)

Professional Memberships

- Institute of Asset Management
- Water Environment Federation
- American Water Works Association
- Water Research Foundation

has demonstrable experience working with multiple data technologies and systems in the asset management and utility space, including multiple Computer Maintenance Management System (CMMS) platforms; ESRI Geospatial Products; Autodesk GeoBIM; Innovyze hydraulic modeling and asset management software; and various Closed Circuit Television technologies utilized for Sanitary and Stormwater Assessments which utilize NASSCO Pipeline Assessment Certification Program (PACP) standards. In Kansas City, he developed the organization's first data management strategic plan as well as its Business Case Evaluation criteria for information technology purchases, which led to both optimization of existing systems and reductions in the cost for new tools utilized in the department.

Scott has developed business risk exposure (Consequence and Likelihood of Failure) models utilized for investment decisions across multiple asset classes, including streets, water, sewer, and stormwater. In Kansas City, he helped reconceptualize and reformulate the criteria for the utility's Annual Sewer Rehabilitation and Water Main Replacement Programs (total value \$65m/year) to a truly risk-based model from a break and fix model. He also led multiple cross-functional teams in the development of software applications and dashboards, including one that integrated as-built project information from city staff, consultants, and contractors working on the Consent Decree (40+ projects; 80+ discrete users; 35,000 work orders; projects valued over \$100 million) at no extra cost to the utility.

Scott has led the development of multi-billion-dollar capital improvement plans in communities throughout the country as both an employee and consultant. He has extensive experience with all elements of utility capital planning, financing, and project delivery, particularly all fiduciary components related to enterprise funds (Water, Wastewater, Stormwater, Solid Waste); rate structure analysis and recommendations to governing bodies; bond sales and refinancing; long-term debt outlooks; and allocations of revenue and expense. At KC Water, he developed an alternative capital plan that was utilized for the Consent Decree renegotiations with the EPA and reduced the city's commitment by \$1.3 billion over the original program, while assuring more time to meet the tenants of the decree. He also created the Business Case Evaluation model for capital improvement projects, which has been recognized by the WEF Water Intrapreneurs for Successful Enterprises (WISE) program of industry leaders. He managed the successful selection (valued at \$100 million) of State Revolving Funds (SRF) for the \$160 million Blue River Treatment Plant Solids Handling project.

PUBLICATIONS

- "The Power of Business Process Modeling: Planning and Delivering Capital Improvements in Missouri" by Scott Parker and Daniel Ott, Water Environment and Technology (WE&T), September 2022. https://www.waterenvironmenttechnology-digital.com/waterenvironmenttechnology/august_2022?folio=46
- "Asset Management Opens the Door to Wastewater Treatment Improvement," by Scott Parker and Brent Herring, September 2019. <https://waste-water->

management.utilitiestechoutlook.com/cxoinight/asset-management-opens-the-door-to-wastewater-treatment-improvement-nwid-441.html

- Reinventing Water Management,” North America Outlook, Issue 1 (December 2020): 12-17.
<https://www.northamericaoutlookmag.com/magazine/issues/2-north-america-outlook-issue-01-december-20>

NATIONAL AND REGIONAL PRESENTATIONS

- 2022 WEF Collections Systems Conference, Presenter
- 2022 AWWA/WEF Utility Manager’s Conference, Presenter
- 2020 AWWA/WEF Utility Managers Conference, Presenter
- 2020 Kansas Asset Management User Group (KAMUG) Conference, Presenter
- 2019 Mid-America Regional Council Urban Stormwater Conference, Presenter
- 2015 American Water Works Association Utility Management Conference, Presenter
- 2015 Transforming Local Government (TLG) Conference, Presenter
- 2013 American Water Works Association 2013 Sustainable Water Management Conference, Presenter

Susan Healy Keene AICP

LOCAL GOVERNMENT SME

Senior Advisor

ROLE

Susan will advise on program development and leverage her past infrastructure expertise.

PROFILE

Susan Healy Keene has over 30 years of experience in local government. She served as Director of Community Development in the cities of Beverly Hills and West Hollywood, California. She also served in various planning positions for the City of Santa Monica.

As a consultant, Susan has assisted public agencies in the creation of strategic plans, organizational assessments, and development process improvements. She has successfully facilitated workshops for board retreats and city council priority setting sessions to build consensus and achieve results. Susan helps government leaders increase organizational effectiveness by planning and establishing clear and actionable goals.

As Director of Community Development in the City of Beverly Hills, Susan led a full-service department with 70 FTEs and a \$22.5M budget. The department included planning, building and safety, code enforcement, transportation, traffic engineering, rent stabilization, special events, and filming. She guided development review and completion of major construction projects including iconic retail stores on Rodeo Drive, a five-star hotel, and luxury single-family homes. Through implementation of the Department Strategic Plan, Susan provided optimum delivery of services that included engagement with residents and the business community.



Professional History

- Raftelis: Senior Advisor (2024-present)
- Management Partners: Special Advisor: Baker Tilly, through acquisition of Management Partners (2022-2024); Special Advisor (2021-2022)
- City of Beverly Hills, California: Director of Community Development (2009-2021)
- City of West Hollywood, California: Director of Community Development (2005-2009), Planning Manager (2001-2005)
- City of Santa Monica, California: Senior Planner (1998-2001), Associate Planner (1995-1998), Assistant Planner (1992-1995)

Education

- Master of Arts degree in Organizational Leadership - Woodbury University (2013)
- Bachelor of Arts degree in Urban Planning and Design - University of Cincinnati (1976)

Certifications

- American Institute of Certified Planners (AICP) (1995)

Professional Memberships

- American Planning Association

Susan has held leadership positions in professional associations including the League of California Cities as Past President of the Planning and Community Development Department and as co-chair for the American Planning Association State conference and committee chair for the National APA conference. In 2013, the California Chapter of the APA Planner Emeritus Network (PEN) awarded Susan recognition for her contributions to the planning profession. Susan values public service and works to encourage planning for the future with collaborative problem solving and good governance.

PRESENTATIONS

- “Work It Out: Empowering Front-Line Innovators to Revolutionize Process Improvement: A Case Study in Process Improvement,” Municipal Management Association of Southern California (MMASC), 2023
- “Women Planning Directors,” National American Planning Association Conference, (APA), 2012

Mahdi Aluzri

LOCAL GOVERNMENT SME

Senior Advisor



PROFILE

Mahdi Aluzri has 35 years of direct public service experience, most recently as City Manager for Beverly Hills, California. After retiring and prior to joining Raftelis, he joined Baker Tilly (formerly Management Partners) as a Special Advisor consulting for a variety of municipal projects in California and throughout the country. Projects included executive coaching, development process evaluation, transportation agencies assessment and other municipal agencies process assessment engagements.

Mahdi served as City Manager in Beverly Hills for four years and prior to that was the Assistant City Manager for close to six years, capping an almost 30-year career in the City. As City Manager, he was responsible for developing policies to present to the City Council, developing the annual budget of over \$450 million, and overseeing nine City operating departments with over 1,000 employees. Mahdi also served for two years as Deputy City Manager for the City of Rancho Cucamonga, California, where he was in charge of Community Development functions which include public works, engineering, utilities, planning, building and safety and code enforcement.

As a public service professional, Mahdi has a proven record of effective leadership with a strategic approach to problem solving and strong management expertise and a consensus building approach. He has extensive project management and development skills focusing on outcome and results. Mahdi has a strong work ethic with exceptional customer service orientation.

Mahdi earned a master's degree in Business Administration from Loyola Marymount University and bachelor's and master's degrees in civil engineering from the University of Southern California. He is a licensed professional engineer in the State of California and is a member of the American Institute of Certified Planners (AICP). He is also a long-standing member of the

Education

- MBA, Loyola Marymount University, Los Angeles, CA (2005)
- MS. Structural Engineering, University of Southern California, Los Angeles, CA (1982)
- BS. Engineering, University of Southern California, Los Angeles, CA (1980)

Certifications

- Licensed Professional Engineer, California
- AICP Certification

Professional Memberships

- American Planning Association
- International City/County Management Association

International City/County Management Association (ICMA), and served on many policy committees for the League of California Cities (LCC).

KEY PROJECT EXPERIENCE

City of Cleveland (OH) Development: Dev Review Process Assessment

Mahdi served as a member of the Baker Tilly team evaluating the city's development review process to determine how projects are reviewed through the different city departments from time of submittal to issuing the permits and inspection follow up. (June 2023). The team identified problem issues, gaps and areas of improvements and provided recommendations to facilitate the process and provide improved service to the customer base.

City of Novato (CA): Community Development Project Review Process

Served as a member of the Baker Till team evaluating the development review process and providing recommendation for improvements along with process mapping and changes to facilitate the review process (September 2023).

City of Pasadena (CA): Assessment of impact of Rent Control Initiative

As a member of the Baker Tilly Team (April 2022), Mahdi conducted an assessment of a ballot initiative that set regulations and established a rent control programs that applies to all multi housing units in the city (excluded more recent development). The evaluation included review of the initiative terms and how it applies, establishing fiscal impact including recommendations for development of an organizational structure, staffing, and expected budget to support the initiative implementation.

Charlotte Area Transit System (NC): Organizational Assessment

Served as a member of the Management Partners team to assess the organizational structure of the agency including its senior management in the different divisions especially their bus service group. The project (August 2022) included review of their capital and operating budgets, staffing requirements and service delivery in light of proposed system expansion and possible tax initiative for funding sources.

PROJECT LIST

- City of Cleveland (OH): Development Review Process Assessment (2023)
- City of Novato (CA): Permit Review process Assessment (2023)
- City of Charlotte (NC): CATS Organizational Assessment (2022)
- City of Pasadena (CA): Assessment of Impact of Rent Control Initiative (2022)
- City of Pasadena (CA): Building Permit Process Review (2021)
- City of Pasadena (CA): Building Inspection Division Assessment (2022)
- City of South Miami (FL): Public Works Department Performance Audit (2021)
- City of Sunbury (PA): Strategic Management Plan Development (2020)

Dan Marks AICP

LOCAL GOVERNMENT SME

Senior Advisor



PROFILE

Dan has more than 30 years of experience as a local government land use planner, including 16 years as a Community Development Director and Planning Director. He has served in several California jurisdictions including Berkeley (Director, 2003-2012 and Zoning Officer, 1995-97), Fremont (Planning Director, 1997-2003, Associate Planner, 1988-90), Napa (Principal Planner, 1990-95). After retiring from full time public service in 2012, he has been a local government management consultant. His consulting work has included interim assignments as Community Development Director for the cities of Vallejo, CA (2012-14) and Benicia, CA (2014-15), and as principal analyst for improving the land use and building permit processing functions for over 25 California jurisdictions, including Alameda County and the cities of Pleasant Hill, Santa Cruz, Lafayette, San Leandro, and Santa Rosa.

As Director of Planning and Development for the City of Berkeley, Dan instituted numerous procedural improvements to allow for a more certain and timely development review process. He also won awards for a groundbreaking Climate Action Plan and a Downtown Plan which resulted in transforming Berkeley's downtown. In virtually all of the cities where Dan has been a manager, he has taken divisions and departments in crisis and created stable and strong teams, streamlined development processes, and significantly improved the relationship of the department to the community and to building and design professionals.

Dan specializes in streamlining permit processing for both land use entitlements and building permits, improving community development department functional alignment and structure, identifying methods

Professional History

- Management Partners: Principal Analyst (2003-2012); Interim Community Development Director, Vallejo, California (2012-2014); Interim Community Development Director, Benicia (2014-15)
- City of Berkeley, California: Director (2003-2012); Zoning Officer (1995-1997)
- City of Fremont, California: Planning Director (1997-2003); Associate Planner (1988-1990)
- City of Napa, California: Principal Planner, (1990-1995)

Education

- Master of City Planning - University of California, Berkeley (1980)

Certifications

- American Institute of Certified Planners (AICP), American Planning Association

Professional Memberships

- American Planning Association
- Planner Emeritus Network

for ensuring appropriate community engagement, assessing the use of technology in permit processing, and facilitating improved communication between permit reviewing agencies. He has expertise in zoning tools, historic preservation, Housing Elements, Climate Action Plans, and the California Environmental Quality Act.

Dan has Master of City Planning (MCP) degree from the University of California, Berkeley (1980) and has been a member of the American Institute of Certified Planners (AICP) since 1984. He has taught in UC Berkeley's Department of City and Regional Planning and is a member of the Planner Emeritus Network. Until recently, Dan was on the Board of the Greenbelt Alliance, a Bay Area regional planning organization, and he has previously been on the Board of the San Francisco Planning and Urban Research Association (SPUR), a planning-advocacy organization.

PUBLICATIONS

- "Plan Bay Area, What Has it Accomplished, What Needs to be Done," 2020
- "Local Government Planning in a Post-Covid World," 2020
- "Whither Bay Area Planning?," 2015
- "Solar Access," Planners Advisory Service, 2009
- "Centerville Specific Plan," Fremont, 2002
- "Big Ranch Specific Plan" Napa," 1994
- "Fremont General Plan," 1992
- "Bay Meadows Specific Plan EIR," 1987
- "Room Enough, Housing and Open Space in the Bay Area," 1984
- "South of Market, A Plan for San Francisco's Last Frontier," 1980

PRESENTATIONS

- "Navigating Conflict and Achieving Successful Planning Outcomes," Bay Area Planning Directors Association, 2014
- "So You Want to Be A Community Development Director?," California Chapter, American Planning Association, 2013
- "Planning the People's Republic," Bay Area Planning Directors Association, 2012
- "How Local Governments Address Climate Change and Sustainability," Bay Area Planning Directors Association, 2007
- "Budgeting in Hard Times," APA sponsored seminar, 2003

Harold Mitchell PMP, ACP, PMI-PBA

SOLID WASTE STAFF CONSULTANT Senior Consultant

PROFILE

Harold specializes in stormwater financial assessments, supporting project decision-making and prioritization with detailed analyses. Previously, he optimized business applications and led IT projects at International Paper and managed SaaS and IT infrastructure projects for the City of Memphis. As a Lead Database Analyst for Memphis' Solid Waste Division, he enhanced fleet and route services with data visualizations and automated reporting. He led the integration of Rubicon's SaaS with Oracle's CRM database and ensured the fleet's 360+ vehicles were equipped for improved route tracking and maintenance. Harold holds an MBA with a focus on Project Management and Data Analytics and professional certifications, including PMP, PMI-ACP, and PMI-PBA. He is proficient in Power BI, SQL, and financial modeling.

RELEVANT PROJECT EXPERIENCE

Montgomery County (OH): Solid Waste Billing Software & Call Center

Montgomery County is engaged with Raftelis to support Annual Property Charge (APC) solid waste billing using the billing software designed by Raftelis for this purpose. Additionally, Raftelis staffed a call center to intake customer questions and disputes regarding the fee. Harold assisted in the development of standard operating procedures and training materials. Harold also managed the call center staff, ensuring



Professional History

- Raftelis: Senior Consultant (2023-Current)
- International Paper: Business Analyst (2022-2023)
- City of Memphis: Project Manager (2021-2022); Lead Database Analyst (2019-2021)

Education

- Master of Business Administration in Project Management & Data Analytics - University of Memphis (2022)
- Bachelor of Science in Sociology & Public Administration - University of Memphis (2017)

Certifications

- PMI-PMP (Project Management Professional)
- PMI-PBA (Professional Business Analyst)
- PMI-ACP (Agile Certified Practitioner)
- Microsoft Office Specialist (MOS Expert)

Professional Memberships

- Project Management Institute – PMI Memphis Chapter Member
- PMI Netherlands Chapter Member
- PMI Memphis Board Member, VP of Technology
- SWANA - Young Professional
- Leadership Memphis Alumni Member

appropriate coverage of representatives and that proper tracking procedures were utilized. Additionally, he compiled and provided reports of activities and open inquiries to County staff on a weekly basis, ensuring inquiries were progressing through the appropriate channels before being closed out. He will continue in this role for the upcoming call center period in January 2025.

City of Memphis (TN): Solid Waste Division Financial Modeling

Conducting analysis of various service delivery scenarios for future fiscal years, to determine the revenue requirements for each. The results of this analysis will be a proposal for a new per-customer rate surrounding the new service delivery model proposed.

Port St. Lucie (FL): Solid Waste In-House Study

Conducting analysis pertaining to sourcing staffing, facility, and fleet needs in-house, regarding city solid waste services, for both residential and commercial customers within the servicing area. The result of this analysis will be a per customer, per service type cost, that will be provided as a high-level comparison to the current contracted service, per customer, cost.

Sarah Neely

FINANCE STAFF CONSULTANT Senior Consultant



PROFILE

Sarah brings a client-centric approach with a desire to provide value in all her engagements. She has contributed to projects involving water, wastewater, solid waste, and stormwater enterprise systems. She specializes in the performance of solid waste cost of service and financial planning evaluations with the following areas of concentrations:

- Solid waste collection cost of service and rate studies
- Disposal cost of service and rate studies
- Long-Range Financial Modeling / Master Plans planning support
- Financial/economic evaluations of solid waste system operations
- Review of contractual arrangements (e.g., evaluation of collection hauler bids/contracts)
- Assistance in feasibility studies in the issuance of debt (i.e., Bond Feasibility studies) and assistance in development of Bond Resolution / Trust Indenture agreements

KEY PROJECT EXPERIENCE

City of Oxnard (CA): Solid Waste Impact Fee and Cost-of-service Study

Sarah assisted in the analysis and development of solid waste impact fees for the City of Oxnard (City). The fees developed included solid waste container, truck, and facility fees. Sarah supported the development of an impact fee model assessing the City's solid waste costs in terms of the appropriate units of service capacity per the fee type and the application of the cost per unit of service capacity to the customer's level of service requirements for fee design. The evaluation required review of the City's solid waste related fixed asset records and functional allocation of the assets (e.g., MRF and transfer station equipment, etc.). Most recently, Sarah assisted in a cost-of-service analysis for the City evaluating their collection and disposal rate structure for residential, commercial, and industrial customers. With the City having not conducted a cost-of-service analysis in over ten years, while subject to local, state, and federal mandates regarding solid waste handling (e.g., S.B. 1383), and rising costs, they were faced with

Professional History

- Raftelis: Senior Consultant (2025-present); Consultant (2023-2024); Associate Consultant (2021-2022)

Education

- Master of Business Administration, Finance - Rollins College (2021)
- Bachelor of Arts, International Business – Rollins College (2020)

Professional Memberships

- Solid Waste Association of North America (SWANA)
- Water Environment Federation (WEF)

funding deficiencies. A financial plan was developed to ensure adequate reserves over the five-year planning period and developed equitable rates for the City's customers.

CALIFORNIA PROJECT LIST

- City of Lincoln (CA) – Solid waste cost-of-service rate study
- City of Long Beach, (CA) – Solid waste waste-to-energy and SB1383 procurement support services
- Calaveras County (CA) – Solid waste cost-of-service rate study
- Madera County (CA) – Solid waste cost-of-service rate study and solid waste management system evaluation

Claire Pritchard

OPERATIONS STAFF CONSULTANT

Senior Consultant



PROFILE

Claire has more than ten years of experience in management consulting and local government management. She began her consulting career following five years of service with Dakota County, Minnesota, where, most recently, she held the position of assistant to the county manager. While with Dakota County, Claire coordinated the County's legislative agenda, assisted in the development of the annual budget, and conducted financial impact analyses and process improvement efforts for a variety of County functions. Claire also coordinated the County's transition to a new form of government in 2013.

As a consultant, Claire has worked on organizational and staffing analyses for communities around the country, such as the Town of Nantucket, Massachusetts, the City of Allentown, Pennsylvania, and the City of Bloomington, Indiana, as well as several utilities, including Fairfax Water, Virginia, Pinellas County Utilities, Florida, the San Diego Public Utilities Department, California, and Tampa Bay Water, Florida.

Claire has assisted in developing financial models to analyze revenue and expenditure trends, as well as conducted detailed staffing and workload analysis to determine optimal organizational structures. She has developed and analyzed an array of employee and community-based surveys. Claire has conducted several best practice and benchmarking research projects and has assisted in the creation of strategic planning and implementation deliverables.

As a student at the University of Chicago, Claire served as a policy intern with the National Association of Regional Councils, where she developed an educational program on the work of regional councils. She was also

Professional History

- Raftelis: Senior Consultant (2023-present); Consultant (2021-2022); Associate Consultant (2020-2021); Associate Consultant, The Novak Consulting Group (2018-2020)
- Dakota County, Minnesota: Assistant to the County Manager (2013-2017)
- National Association of Regional Councils: Policy Intern (2012)
- Congressional Research Service (2010-2011)

Education

- Master of Public Policy - University of Chicago (2013)
- Bachelor of Arts in Political Science - University of Chicago (2009)

Professional Memberships

- International City/County Management Association (ICMA)
- Engaging Local Government Leaders (ELGL)
- International Facility Management Association (IFMA)

the associate editor for international development for the Chicago Policy Review.

Claire earned a bachelor's degree in political science from the University of Chicago and a master's degree in public policy from the University of Chicago Harris School of Public Policy. She is a member of the International City/County Management Association and is a former ICMA Local Government Management Fellow.

EXHIBIT B SCHEDULE

TASK	SUMMARIZED DESCRIPTION	ESTIMATED TIME OF COMPLETION
Evaluation	• This assessment will analyze Vernon's solid waste franchise system by evaluating hauler capacity, finances, contracts, competitiveness, reporting, and customer satisfaction.	8/31/2025
Report Development & Recommendations	• A comprehensive evaluation of Vernon's solid waste system will synthesize data, propose and justify a new model based on various impacts, analyze best practices from similar jurisdictions, and culminate in a detailed report with an implementation plan.	12/31/2025
Stakeholder Engagement	• Convene a meeting to present preliminary findings and gather input on the recommended model.	3/31/2026
City Council Report	• Present the findings and recommendations to the City Council for review and consideration.	6/30/2026
RFP Development & Publication	• Develop and distribute an RFP for its selected solid waste management model, including a draft franchise agreement and pre-proposal meeting with potential haulers.	3/31/2027
RFP Response Evaluation & Recommendation for Selection	• Evaluate RFP responses, conduct interviews and negotiations, and present recommendations to the City Council to finalize franchise agreement for the selected solid waste management model.	6/30/2027
Implementation	• Assist in transitioning to the new solid waste system through implementation support, transition scheduling, meeting facilitation, and accountability tracking.	12/31/2029

Task-Based Fee Schedule

Task	Task Name	Estimated Hours	Blended Rate	Not-to-Exceed Fee
Task 1	Evaluation of Current Non-Exclusive Franchise System	120 hours	\$280/hour	\$33,600
Task 2	Report Development & Recommendations	100 hours	\$280/hour	\$28,000
Task 3	Stakeholder Engagement	110 hours	\$280/hour	\$30,800
Task 4	City Council Report & Presentation	30 hours	\$280/hour	\$8,400
Task 5	RFP Development & Publication	110 hours	\$280/hour	\$30,800
Task 6	RFP Response Evaluation & Franchisee Selection	100 hours	\$280/hour	\$28,000
Task 7	Implementation of New Solid Waste Management System	160 hours	\$280/hour	\$44,800
Total		730 hours	\$280/hour	\$204,400

Annualized Cost Breakdown

Project Year	Tasks Included	Estimated Annual Cost
2025	Tasks 1 & 2	\$61,600
2026	Tasks 3 & 4	\$39,200
2027	Tasks 5 & 6	\$58,800
2028–2029	Task 7 (Implementation Support)	\$44,800
Total		\$204,400

EXHIBIT C
EQUAL EMPLOYMENT OPPORTUNITY
PRACTICES PROVISIONS

- A. Contractor certifies and represents that, during the performance of this Agreement, the contractor and each subcontractor shall adhere to equal opportunity employment practices to assure that applicants and employees are treated equally and are not discriminated against because of their race, religious creed, color, national origin, ancestry, handicap, sex, or age. Contractor further certifies that it will not maintain any segregated facilities.
- B. Contractor agrees that it shall, in all solicitations or advertisements for applicants for employment placed by or on behalf of Contractor, state that it is an "Equal Opportunity Employer" or that all qualified applicants will receive consideration for employment without regard to their race, religious creed, color, national origin, ancestry, handicap, sex or age.
- C. Contractor agrees that it shall, if requested to do so by the City, certify that it has not, in the performance of this Agreement, discriminated against applicants or employees because of their membership in a protected class.
- D. Contractor agrees to provide the City with access to, and, if requested to do so by City, through its awarding authority, provide copies of all of its records pertaining or relating to its employment practices, except to the extent such records or portions of such records are confidential or privileged under state or federal law.
- E. Nothing contained in this Agreement shall be construed in any manner as to require or permit any act which is prohibited by law.