

## **ATTACHMENT “B”**

Consultant Responses to Request for Qualifications – for the three top-ranked firms

- Management Partners Incorporated
- Dewey Square Group
- Miralto Management Consultants

Reference:  
City Manager’s Report No. 05-049

Relating to:  
Mayor-Council Form of Government Transition Plan  
Consultant Selection and Work Plan



**MANAGEMENT PARTNERS**  
I N C O R P O R A T E D

February 11, 2005

Beth A. Murray  
Assistant to the City Manager  
City of San Diego  
1200 Third Avenue, Suite 1700  
San Diego, CA 92101

Dear Ms. Murray:

Management Partners is pleased to respond to your Request for Qualifications for consulting services to assist the City of San Diego in the Strong Mayor Form of Governance Transition Process. We would welcome the opportunity to assist with this important undertaking, and we believe we are unusually well qualified to do so.

**About Management Partners**

Management Partners is a professional consulting firm dedicated to helping government organizations increase their effectiveness. The firm was founded in 1994 and over the past eleven years we have worked with hundreds of public sector organizations in a variety of capacities. We are staffed with professionals who are experienced public service leaders as well as qualified management consultants. The firm has two offices—one in San Jose, California and another in Cincinnati, Ohio. We serve local governments throughout the United States.

Our passion is effective public service performance. As a firm, we are qualified to assist local government leaders in every dimension of self-governance, ranging from governance structure and policy-making to administration of individual programs in direct service to the public. We are committed to producing first-rate staff work by identifying and building on existing strengths, always with an eye on the objective of public service: constantly improving services to the residents who pay the bill.

Management Partners' clients have benefited from the firm's expertise in implementing quality management systems for organizations both large and small, including strategic and business planning, the design and installation of performance management systems,

the development of customer service standards and associated customer service training, and process improvement. We have also assisted clients with team building, goal setting, conflict management, and supervisory skills training.

Management Partners was created with the mission of helping local government leaders improve the effectiveness of their governments. The firm now has a staff of twenty-five people working in our consulting practices based in San Jose and Cincinnati. Each practice is led by a Regional Vice President with extensive local government leadership experience and is staffed by a team of professional consultants. Every member of our team has served in local government prior to being selected to be an associate of Management Partners. These teams of Management Partners associates are supplemented by a select group of subject matter experts, with national level qualifications as leaders in their respective local government disciplines: municipal law, fire and EMS service, police service, library service, airport operations, and public works.

Management Partners has a number of professional staff members who can be deployed to assist with the San Diego effort, as appropriate. More complete information about the firm and our consultants can be found at our website, [www.managementpartners.com](http://www.managementpartners.com). We believe that it is crucial to success in providing consulting services that the consultants and their approach to the work be specifically tailored to the needs of the client. Once a firm has been selected, one or more detailed scopes of work can be prepared and individual consultants designated in consultation with City leaders.

### **Experience with Government Organizational Change**

It will be important to tailor the consulting work for the City of San Diego to the particular needs of City stakeholders. San Diego leaders have a unique opportunity to structure their institutional arrangements and operating procedures at the onset of relationships based on a new allocation of public service responsibilities. While it is clear that the legislative and executive functions have differing emphases and interests that should be thoughtfully assessed, at the end of the day all of the elected (and, by extension, appointed) leaders share a common interest in providing the best possible local government to the residents and taxpayers of San Diego.

Management Partners has an unusual breadth of exposure to the structure and operation of America's largest cities and counties, including all forms of governance. Of particular relevance to the San Diego situation is our experience with many cities that have made structural transitions in the last twenty years (Oakland, Fresno, San Jose, Cincinnati). Further, we are in constant contact with the largest North American cities through our role as the secretariat of the Large Cities Executive Forum.

Our experience in leading significant organizational change in large municipal government is therefore a blend of actual experience as a participant in such change as it occurred, and as a consultant advisor to leaders engaged in such change. The most recent and prominent such initiative is the consolidation of the City of Louisville with Jefferson County, Kentucky, its surrounding county. That consolidation was approved by the voters

in 2002 and led by Jerry E. Abramson who became the Mayor (in a Mayor-Council structure) of the newly-integrated entity in January 2003. As noted below, we have assisted the Mayor and the government in a multiplicity of ways over the last two years to move through integration along a planned path towards the full implementation of best practices in every department and cabinet of the government. Importantly, we are currently assisting in the implementation of a modern system of performance management throughout the government.

Perhaps a word of philosophy might be useful. Every setting is unique, and any outsider who begins with a pat formulaic approach should be suspect. But having led change in large local governments (Fresno, San Jose, Cincinnati), and supported change initiatives as a professional consultant (Louisville; Washington, D.C.; Columbus, Ohio; Orange County, California), we have some ideas about techniques that can be successful and approaches that are not so successful. Moreover, as part of a recent study of the organization of the Office of the Mayor in the Louisville Metro government, Management Partners conducted a review of other cities to identify common needs and to understand how staffing at the senior level actually worked. (This is easier said than done: staff titles and roles vary widely - Chief Operating Officer, Deputy Mayor, Chief of Staff, and so on). In conducting this review we specifically examined the cities of Boston, Columbus, Minneapolis, and Indianapolis. This work should provide useful information for San Diego leaders.

San Diego begins its transition with constraints. The holders of elective office have been selected and the basic outline of the new institutional arrangements has been established by the Charter amendment. It will be important as a beginning point to sort out the hopes, ideas, preferences and apprehensions held by those responsible for implementation—the elected leaders. This need suggests that the starting point for any outside advisor would be to begin with individual interviews of those who will lead this transition, and the city afterwards.

This transition offers a unique opportunity to think through the structural approaches (leadership positions, committee structure, etc., on the legislative side; organizational structure of the Mayor's Office and the internal staff relationships on the executive side), as well as the processes through which the business of the executive and the legislative branches will be transacted as they interact. As important, it will be useful to clarify how the separate responsibilities of each branch will be carried out in daily practice. City Councils have rules and protocols that they use to guide their operations and often rely on custom, as well. These matters can be documented, researched and analyzed for decision-makers to consider.

### **Approach**

The consulting support that the city retains should be prepared to function at different levels simultaneously. On the one hand, the leader of the consulting team should be available to assist the elected leaders in sorting out their issues and priorities on a personal basis. At the same time, there is great value in structuring a process that will

serve the broader public interest of transparency. Most of the transition decisions will be seen by outsiders as technical in nature and will not be of broad public interest. But to the extent possible, city leaders will want to be open to ideas, and a process to accommodate such public input could be quite valuable. Management Partners has experience structuring and facilitating public input in addition to the other tools that will be employed during this type of project.

There are a number of issues that will need to be researched to learn about practices in other cities and the practical consequences of alternative choices. Some of that research can naturally be done by the consultant's team, which can assume responsibility for providing quality staff work for decision-makers to use. Some of that work must be done by city staff, since expertise in the particular requirements of the San Diego law and rules must be factored in. Management Partners is prepared to coordinate as appropriate on such matters.

Once the initial interviews of city leaders have been completed it should be possible to outline a consulting work plan that will meet their needs for a quality transition. As noted, the goal of a smooth transition is over-arching and is shared by all leaders. Even so, the City Council and the Mayor will have needs which should be separately defined and supported. The consultant work plan should include all of these elements and indicate how they will be addressed over time against a specific schedule for implementation.

### **Reference Experience**

Consulting is quintessentially a personal service enterprise. I serve as the leader of the company and am personally involved in most of our engagements. I am supported by a wonderful array of extraordinary colleagues, each with first-rate experience in local government. A summary of my professional background follows:

**Jerry Newfarmer** is the President and CEO of Management Partners. Jerry has over 35 years of management experience in local government. After serving in a variety of positions for the City of Oakland over almost ten years, he served as City Manager in Fresno and San Jose, California. He then served as President of the San Francisco Chamber of Commerce before moving to Cincinnati, Ohio, to serve as City Manager. In addition, he served as Team Leader of the State-Local Relations Team of the National Performance Review. Another interesting element of background is that Mr. Newfarmer was the original organizer of what became the International City/County Management Association Center for Performance Measurement, the leading national effort to identify and compare performance among cities.

Other members of Management Partners staff will assist with this project. Andrew Belknap, John Baker, Julie Hernandez, Rebekka Hosken, Karin Temple, Michael Bridges and Patricia Cypher will join me in this work as appropriate. Biographical information for these associates is provided as an attachment.

Management Partners has assisted numerous local governments throughout California and the United States. Among our larger city clients we have assisted in recent years are the cities of Oakland, Fresno, San Jose, Long Beach, and Riverside in California. Other significant city clients are Washington, D.C.; Columbus and Cleveland, Ohio; Kansas City, Missouri; Baltimore, Maryland; Boston, Massachusetts; Minneapolis, Minnesota; Wichita and Topeka, Kansas; and Tucson, Arizona. Specific references include:

**Louisville Metro, Kentucky**

Management Partners has been assisting Mayor Jerry Abramson in effecting the integration of the former City of Louisville with the former Jefferson County, Kentucky, into a single government for Louisville Metro, the sixteenth largest city in the United States. The firm has been assisting the Mayor and his management team since his election in November 2002, and has been working throughout the government to complete integration and transition to a best-in-class level of operations. In addition to conducting performance reviews of general government functions, Management Partners has been engaged in developing a comprehensive, integrated management system that includes performance measurement and project tracking systems.

Client Contact:           Honorable Jerry Abramson  
                                  Mayor, Louisville Metro  
                                  527 West Jefferson Street  
                                  Louisville, KY 40202  
                                  502-574-2003

**City of San Jose, California**

The City Charter was amended to enhance the Mayor's role and to improve the capacity of the City Council during my service in San Jose (1983-1989). In more recent years, Management Partners has assisted the city administration in a number of areas to improve governmental performance, including the management of its capital improvement program, the management of the park maintenance function, and most recently in supporting new management teams in the Police Department and in the Fire Department with executive coaching services.

Client Contact:           Delbert Borgsdorf  
                                  City Manager  
                                  801 N. First Street, Room 320  
                                  San Jose, CA 95110  
                                  408-277-5777

**City of Fresno, California**

Subsequent to my service in Fresno (1978-1983), the city transitioned to the Mayor-Council form of government. Management Partners has assisted the city during the administration of Mayor Alan Autry (the current Mayor) with a number of projects, mainly in the financial management function. We also assisted the city's benchmarking process in which it compared governmental performance with other large California cities.

Client Contact:           Honorable Alan Autry, Mayor  
                                  Daniel G. Hobbs, City Manager  
                                  City of Fresno  
                                  2600 Fresno Street  
                                  Fresno, CA 93721  
                                  559-621-7770

**Port of Sacramento, California**

The Port of Sacramento is an independent district led by Board Members who are elected officials from the cities of Sacramento and West Sacramento and the counties of Sacramento and Yolo. The Board retained Management Partners last fall to provide interim management and to develop a plan to transition the Port to financial stability.

Client Contact:           Honorable Michael McGowan  
                                  Board Chair and Member, Yolo County Board of Supervisors  
                                  625 Court Street, Room 204  
                                  Woodland, CA 95695  
                                  916-375-6441

**City of Cincinnati, Ohio**

The City of Cincinnati amended its City Charter to enhance the leadership role of the Mayor. Because I had organized Management Partners with an office in Cincinnati subsequent to my service as City Manager (1990-1993), I was actively involved in the deliberations leading to the Charter amendment, and subsequently served as the president of the Charter Committee of Greater Cincinnati, a good government group active in city politics.

Other local government leaders who are familiar with Management Partners' work include:

- Mr. Donald Borut, Executive Director, National League of Cities
- Mr. Robert O'Neill, Jr., Executive Director, International City/County Management Assn.
- Dr. Richard Mendes, Deputy City Manager, City of San Diego

**Proposed Fees and Costs**

In the absence of discussions with the members of the City Council and the Mayor, it is difficult to estimate the specific work that will be required in detail, let alone estimate the hours and nature of the consulting work. We suggest above that the appropriate methodology would be for the consultant to interview the elected leaders of the city (and perhaps appropriate appointed staff), so as to develop a more detailed plan of work, timeline and project budget.

A simple purchase order would be an easy way to commence the engagement. With this approach, the firm will bill the city as work proceeds, according to the firm’s local government billing schedule, for work directed by the city. The local government billing schedule is as follows:

President	\$250/hour
Special Advisor	\$200/hour
Vice President	\$175/hour
Senior Management Advisor	\$125/hour
Management Advisor	\$100/hour
Management Analyst	\$ 75/hour

Management Partners does not normally bill for administrative or support costs separately.

An alternative (probably best once the initial project scoping phase is complete) is the Management Partners’ Partnership Agreement. Under the Partnership Agreement, individual project plans are developed for each separable element of work. Each project plan details the work to be performed, the key activities and/or milestones included, the consultants designated to do the work and the schedule for completion, as well as the number of units of cost. A unit is \$2,500 of consulting expense (including all fees and business expenses). Once the project plan has been approved by the city, the firm commences work. Under the Partnership Agreement it is possible to identify and manage multiple projects with one master agreement in a way that serves the client’s interest.

Management Partners is fully prepared to commit to a specific scope of work, with identified milestones and timelines for completion, at a total cost determined in advance. Indeed, most of our project work for cities is based on such contractual requirements. The Partnership Agreement approach is advantageous to the city because it allows the city to control the phasing of the work with each element contracted for at a predetermined price. Either that approach or a normal personal services contract with contractual performance guarantees is acceptable.



**Conclusion**

Management Partners is uniquely qualified to assist the City of San Diego with the Strong Mayor Form of Governance Transition Process. We have the experience and expertise necessary to help identify the organizational model that will work best for the City of San Diego.

We look forward to working with the City of San Diego on this important project.

Sincerely,

A handwritten signature in black ink, appearing to read "Gerald E. Newfarmer". The signature is fluid and cursive, with a long horizontal stroke at the end.

Gerald E. Newfarmer  
President & CEO

## **ATTACHMENT A**

### **GERALD E. NEWFARMER**

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Jerry Newfarmer, President and CEO, founded Management Partners, in 1994 to help government leaders improve how their organizations work. Prior to founding the company, Jerry served in public service positions with local governments in California and Ohio.

Jerry began his career with the city of Oakland, California, where he served in a variety of management positions over a ten-year period, concluding as Assistant City Manager, the Chief Operating Officer role. Subsequent to his service in Oakland, Jerry served as the City Manager of the cities of Fresno, San Jose and Cincinnati. He has also served as the leader of the State and Local Government Team in the National Performance Review, an examination of the operations and management of the Government of the United States.

In addition to his public service, Jerry served as President of the San Francisco Chamber of Commerce, a position he held during the Loma Prieta Earthquake.

Mr. Newfarmer is a graduate of San Jose State University with a degree in Business Administration. He received his Masters of Public Administration (with distinction) from the University of California at Berkeley. He was honorably discharged from the U.S. Navy with the rank of Lieutenant after service on destroyers that included a tour of duty in Viet Nam.

He has also been active in professional organizations, having served as president of the San Francisco Bay Area Chapter of the American Society of Public Administration and as the president of the City Manager's Department of the League of California Cities. He served as Chair of the ICMA Fund for Professional Management, and as President of the Charter Committee of Greater Cincinnati. He is recognized by the International City/County Management Association (ICMA) as a Credentialed Manager.

## **ANDREW S. BELKNAP**

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Andrew S. Belknap, Regional Vice President with Management Partners, Inc., has over 20 years of diverse local government management experience. He has extensive experience as a City Manager and as a Public Works Director in California. He is a seasoned and practical problem solver with first-hand knowledge of municipal functions. Andy is a trained economist who brings a special expertise to fiscal analysis and public finance issues. His blend of quantitative skills, coupled with a practitioner's understanding of public services and management systems, add value to all types of organizational and policy analysis. He is also an excellent facilitator.

Andy began his career with the City of Oxnard's facilities management division where he created the City's first automated database for tracking infrastructure maintenance, and gained statewide recognition for an energy management program. He served in several management positions within Public Works and was responsible for budgeting, utility rate setting, capital program management and organizational analysis. He set up one of the first automated refuse collection systems in the nation, and completed reorganizations of wastewater treatment plant operations and engineering which produced major cost savings.

Andy became the City Manager for the City of Ojai, a nationally known resort community, after serving three years as Public Works Director. He brought strong leadership and fiscal stability to a community that had been through a difficult period of political controversy, staff turnover and financial troubles. Highlights from his work in Ojai include recognition by the California State Planning Association for the best small community general plan, successful downtown redevelopment efforts, construction of affordable housing, creation of a city public transportation system and development of an award winning youth empowerment program.

At the regional and state level Andy has served on several League of California Cities working groups, most recently as the Santa Barbara area representative on the California youth service task force. He also led a successful effort to create a joint powers library authority serving seven cities with a combined population in excess of 600,000.

Andrew has consulting experience with numerous cities and special districts. He has particular expertise in organizational analysis, financial and budget forecasting, performance measurement, team building and the development of capital improvement program management systems.

Andy holds a Bachelor of Arts degree in Economics and Econometrics and a Masters degree in Economics with a public finance specialty from the University of California Santa Barbara. He is a member of ICMA and the Urban Land Institute.

## **JOHN S. BAKER**

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John S. Baker, Senior Partner with Management Partners, has over thirty years of experience in public service. He has held a variety of administrative and management positions in California cities relating to all aspects of human resource planning, financial planning and monitoring, capital project planning and financing, contract and developer negotiations and organizational analysis and direction.

John co-founded Management Partners in 1994 and served as its president until July 2002, when he returned to direct public service with the City of Redondo Beach. He concluded his service with that city in December 2004.

During his tenure as Assistant City Manager for Oakland and City Manager of Ventura, Mr. Baker developed a special appreciation for team development and its role in addressing major changes in organization structure, resource allocation and employee transitions due to changes in service delivery methods and available financial resources. He has extensive experience in team building, organizational analysis, communication techniques and transition management — all areas in great demand in a changing organization. In the last year of his tenure he was responsible for the development and implementation of a strategic plan for the full range of city services.

Since the formation of Management Partners, Mr. Baker has been directly involved in the reviews of municipal operations for local governments throughout the United States. For the cities of Oakland, Emeryville, Santa Clara, Santa Monica, Riverside, Pomona and Tucson he has performed management audits of specific departments with recommendations for structural and procedural changes to enhance the service delivery of the organizations.

Although John is first and foremost a generalist in city management, he has maintained a special competency in employee services throughout his career, from his early years working in personnel and labor relations in the City of Oakland. In recent years he has assisted cities in conducting systems analysis of city systems involving multiple departments, and has represented jurisdictions at the bargaining table.

Mr. Baker is a graduate of the University of Idaho with a degree in Political Science and has a Master of Public Administration from the University of Washington, Graduate School of Public Affairs.

## **JULIE C.T. HERNANDEZ**

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Julie C.T. Hernandez, Senior Management Advisor, joined Management Partners in December 2004 after spending almost twenty years in public service. In her most recent position she served as Senior Management Analyst for Economic Development and Redevelopment in Moorpark, California (the most affluent and fastest growing city in Ventura County). She was the Assistant City Manger for the City of Santa Paula before joining Moorpark. Prior to her service in Santa Paula, she spent ten years with the city of Oxnard where she held positions of increasing responsibility. Both Oxnard and Santa Paula are very diverse cities, both economically and ethnically, with Hispanic populations as majorities in both cities.

During her career, Julie acquired skills and knowledge in a wide range of areas including personnel, risk management, information systems, city clerk operations, economic development and redevelopment, property management, public information office, and administering film permits. During her service in Moorpark, she simultaneously implemented a three-year, \$1.5 million grant to bring social services to Moorpark and managed a redevelopment project to build a three-building, 30,000 square foot Human Services Complex as a home for the new social and medical services.

In the City of Santa Paula, Julie served as Chief Negotiator for collective bargaining with the City's six employee associations. In addition, Julie's special assignments were the City's California Oil Museum, Cable TV channel, special events permits, and creation of the City's Youth Master Plan and Volunteer Recognition Program.

In the City of Oxnard, Julie worked as a budget analyst for the City Manager's Office and also worked as a Public Works/Development Services Department analyst responsible for water, traffic, equipment maintenance, utility rate studies, establishment of development and permit fees, and the Public Works Department capital improvement plan.

Julie graduated from the University of California at Santa Barbara with a bachelor's degree in psychology and has a master's degree from San Diego State University in Counseling Psychology with a Community Outreach emphasis. She is a member of the International City/County Management Association (ICMA), the National Hispanic Network of Local Government Officials (NHNLGA), the Municipal Management Assistants of Southern California (MMASC), and has served in various capacities on the Boards and on many committees within these organizations, including a term as President of the Hispanic Network. In her community, she has served on the Board of Directors of the local Boys and Girls Club, the United Way, Destino 2000 (a philanthropic grants provider for services to Latinos), Professional Latinos Association Network (PLAN), and the Ventura County Regional Civic Alliance.

## **REBEKKA G. HOSKEN**

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Rebekka Hosken, Senior Management Advisor, has local government experience in a diverse range of communities. Ms. Hosken has worked in the Town Manager's Office in Lexington, Massachusetts, as Executive Assistant to the Mayor in Appleton, Wisconsin, and most recently as the Assistant Village Manager in the Chicago suburb of La Grange Park, Illinois.

Ms. Hosken has been a key staff member in numerous organizational reviews and studies, with a specialization in the improvement of development review (building and planning) processes utilizing process mapping flowcharts as a key diagnostic tool. Her other work with the firm includes studies of Public Works departments, Parks Departments, Police and Sheriff Departments, City Attorney offices, and virtually all aspects of county and city government including performance measurement, benchmarking, and the analysis of fees.

Ms. Hosken co-chaired the City of Appleton's Quality Improvement Program and was responsible for training a majority of the City's 600 employees in methods of quality improvement, group facilitation, and process analysis. During her career, she has facilitated strategic planning processes, implemented the transition from line item to performance budgeting, prepared long-range plans in municipal technology, and been instrumental in the analysis and reorganization of various municipal departments.

Rebekka received her B.A. with honors from the University of Michigan, Ann Arbor, and her Masters in Business Administration with Certificate in Public Management from Boston University. She has served on various committees for the Illinois Association of Municipal Management Assistants (IAMMA), Intergovernmental Risk Management Agency (IRMA) municipal risk pool, and local chambers of commerce. She also presented an ICMA conference course on improving development review processes and co-authored an article on the same topic for PM Magazine.

## **KARIN S. TEMPLE**

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Karin Temple brings to the Management Partners team extensive professional municipal experience with a focus on service, results, and solving problems.

Ms. Temple has fifteen years experience in local government, including her work with Management Partners and service with the cities of San Jose and Hayward, California. Karin began her public management work with the City of San Jose, in both the budget office and as Assistant to the Director of Finance. She subsequently served as the Budget Administrator for the City of Hayward for five years, prior to joining Management Partners.

In her work with the firm, Karin has assisted a long list of California clients ranging from large urban local governments such as Oakland, Orange County, Alameda County, and San Mateo County, to smaller local governments such as the cities of Santa Clara, Alameda, San Mateo, Santa Monica, Martinez and El Cerrito. In addition, she has assisted other clients in the western United States such as Las Vegas and Tucson.

Management Partners is the leading firm nationally in applying the concepts of performance measurement and benchmarking in a local government context, and Karin has been involved in much of this work. She has conducted performance measurement training for the ICMA Center for Performance Measurement for a number of west coast local governments, and has been involved in many Management Partners projects to design and install comprehensive performance measurement systems for the full range of services provided by local clients.

She also has unusual qualifications in financial management and budgeting. She introduced a new budgeting approach in the City of Hayward to simplify the information available to decision-makers and the public, as well as to ease the workload for city departments and provide the City Council with a less cumbersome budget process. The result was that the city received Hayward's first Distinguished Budget Presentation Award from the national Government Finance Officers Association and Excellence in Budgeting Award from the California Society of Municipal Finance Officers. In addition, she assisted the City of Martinez as Acting Director of Finance and has recently completed an organizational analysis of the El Cerrito Finance Department.

Ms. Temple has a bachelors degree in political science from Duke University (cum laude) and a Master of Public Affairs degree with concentration in urban management from Indiana University in Bloomington.

## **MICHAEL K. BRIDGES**

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Mike Bridges, Senior Management Advisor for Management Partners, Inc., has 28 years of management experience in local government and 4 years of local government consulting experience. Mike has served in public service positions and assisted many cities in California and Oregon in a consulting capacity.

Mr. Bridges began his career with the city of Oakland, California where he provided general administration support in several city departments. He served as a Deputy City Manager, managing groups of city departments, and the creation of two new city departments. On leaving Oakland, Mike served as the City Administrator of Cascade Locks, Oregon, a full service city including water, sewer, and municipal electric utilities. Through the Public Service Skills program of the League of California Cities, Mike was the Interim Assistant City Manager in Belmont and the Interim City Manager in Winters. He managed the creation and operation of the Community Assistance Center in response to the 1989 Loma Prieta earthquake and he also opened Oakland's Emergency Center to coordinate the city's response to the 1991 Oakland Hills Firestorm.

Mike is a graduate of San Jose State University with a degree in Business Administration. He received his Masters of Public Administration from California State University, Hayward. He served in the U.S. Air Force Security Service in Okinawa, Thailand, and Viet Nam as a Radio Intercept Specialist with a Top Secret codeword clearance.

Mr. Bridges has been active in community and professional organizations, including serving as President of the Oakland/Dalien Sister City Association. He has served on community boards, including the Oakland Convention and Visitors' Bureau, the Oakland Marketing Board, the Paramount Theater of the Arts, and the Mayor's Community Policing Task Force.



**PATRICIA M. CYPHER**

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Trish Cypher, Management Advisor, has over fifteen years of professional public service experience. She served with the City of San Jose and the Santa Clara Valley Water District prior to joining Management Partners.

Trish's original career focus was environmental studies. While at the City of San Jose, she served in a management position providing project management and program development support on a variety of assignments. She is adept at working with staff teams on complex project assignments. In the City of San Jose's Environmental Services Department, Trish played a key role in the construction and implementation of a \$140-million recycled water capital project and associated programs, including facilitation of stakeholder meetings.

Ms. Cypher returned to graduate school to pursue broadening career interests by obtaining a Masters in Public Administration degree. Subsequently, she has assisted a number of public agencies in Santa Clara County, including the City of Morgan Hill's healthcare foundation, the Silicon Valley Animal Control Authority, and the City of Saratoga.



**DEWEY SQUARE GROUP**

**RFQ RESPONSE  
CONSULTING SERVICES FOR THE  
CITY OF SAN DIEGO  
STRONG MAYOR FORM OF GOVERNMENT TRANSITION PROCESS  
FEBRUARY 11, 2005**

## **INTRODUCTION**

Thank you for the opportunity to submit the Dewey Square Group's (DSG) response to the City of San Diego's request to assist in the Strong Mayor Form of Governance Transition Process. We applaud your earnest response to the voters by quickly engaging experts to determine the best path towards this new form of government. We understand there are many steps involved with this transition, some with inherent challenges. Our proposal addresses these steps and outlines a strategy developed from the institutional knowledge gained by monitoring and participating in other city and transitional governments as well as political, policy and communications expertise from DSG principals and partners in various regions of the country.

Our response is organized into five primary sections:

- I. Work Plan
  - A. DSG Strategy
    1. Field research on model "strong mayor" cities;
    2. Outreach to key stakeholders in targeted "strong mayor" cities;
    3. Coalition development for support of transition plan; and
    4. Communications
- II. DSG Qualifications and Expertise
  - A. Experience and expertise; and
  - B. DSG talent
- III. References
  - A. Donna Lucas
  - B. Alex Tourk
  - C. Zoltan Hajnal
- IV. Pricing
  - A. \$135,000/project; and
  - B. \$35,000/month
- V. Conclusion

## **I. WORK PLAN**

### **A. DSG STRATEGY**

We recommend a straight forward strategy that combines analytical research, outreach, communications and coalition building to assist you in implementing a Mayor-Council form of government. Specifically, this strategy is designed to: gather and synthesize intelligence; obtain public input; cultivate relationships with key stakeholders; build coalitions of support and disseminate information in a cohesive, concise manner. These components are specified below:

#### **1. FIELD RESEARCH**

On the ground field research will result in detailed information to help the City of San Diego identify the best organizational models used by other cities with a Strong Mayor form of government. Paying attention to the details in this research is vital to the success of the transition. We recommend capturing these details and incorporating them into portfolios. The portfolios will include:

- City data, including population, demographics, size, basic budget information;
- Timeline of transition (where relevant); cost of transition;
- Organizational models for city council and independent executive,
  - Committee structure and appointment process
  - Process of election of council president
  - Mayoral staff including relationships between potential positions such as chief of staff and manager, budget office;
- Appointment process for administrative agencies/departments;
- Organizational model, powers granted to, and hiring procedure for independent budget analyst office;
- Mayoral veto application;
- Relationship between organizational differences and ongoing concerns such as council/executive relations, fiscal considerations, public support, accountability, ease of policy making;
- Establishment of best practices for restructuring executive and legislative branches of government; and
- Pros and cons of government style.

The portfolios will also layout, where warranted, previous political and social resistance to policies of concern to the City of San Diego, descriptions of potential allies and opponents, and a realistic assessment of success for San Diego if it follows example city.

#### **2. OUTREACH TO KEY STAKEHOLDERS**

Essential to the transition process for the City of San Diego is the support of key stakeholders, both at local and national levels. To maximize their input, DSG recommends a comprehensive and aggressive outreach strategy, to include:

- Conducting interviews with local elected officials and relevant staff to understand their priorities, gain insight into their current internal processes and allow them to participate in the transition process;
- Conducting interviews with former San Diego mayors and councilmen, where prudent;
- Meeting with elected officials and relevant staff of other leading cities, to share the City of San Diego's goal for a smooth transition, gain insight from their experience and expertise and develop ongoing relationships that will benefit them throughout the transition process;
- Getting public input, through focus groups and targeted surveys;
- Reaching out to academic experts with historical insight on city and transitional government , to bring in a unique perspective to the table; and
- Distributing a regular update to stakeholders, via e-mail, website and/or newsletters to makes sure they understand progress being made.

### **3. COALITION DEVELOPMENT**

It has been our experience that in order for communities and constituents to buy in to new processes established by governments, agencies and corporations, they must hear the message from third-party validators or people who do not directly benefit from the changes being made. Consequently, in addition to conducting outreach to key stakeholders, DSG recommends building diverse, broad-based coalitions that will act as validators for the City of San Diego and its transition.

DSG develops relationships for clients and constituencies to educate opinion leaders about a broad range of complex issues and build support that delivers results at the local and national levels. Our coalition building has involved Fortune 100 companies, elected officials, government agencies and constituencies including: United States Senators and Members of Congress; Hispanic Asian and African-American churches, associations, and caucuses; and, policy specific organizations such as health care, environment, business, transportation, labor, and telecommunications.

Based on our experience, we would recommend that San Diego engage in the following coalition building strategy:

- A cross-functional team of academic, political, policy and communications experts to provide a balanced approach to each transition strategy. This coalition inoculates the City of San Diego from appearing biased towards one influential group against another; and
- A working list of identified third-party validators, including national and regional leaders that may be contacted to support the City of San Diego. These validators may be called upon to speak to editorial boards, commissions, academic institutions and other influential organizations, on the City of San Diego's behalf.

### **4. COMMUNICATIONS**

Maintaining strong public support throughout the transition process will be critical to a successful outcome. As we craft a core message and deliver it to stakeholders and

prospective coalition partners, we must not forget the citizens who voted for and endorsed this new direction. To do that, we recommend treating the local media as a partner in the process. To this end, we will:

- Aggressively reach out to the key reporters, editors, columnists, talk radio hosts, bloggers, minority and alternative media and other opinion makers who drive press coverage in San Diego.
- Hold regular briefings, meet with editorial boards and pitch positive stories that fit in the frame of the transition's core message.
- Place Op-Eds that validate the message
- Train spokespeople both within and outside the City to carry the message
- Provide rapid-response crisis communications if and when the process runs into roadblocks.

## **II. DSG QUALIFICATIONS AND EXPERTISE**

### **A. EXPERIENCE AND EXPERTISE**

DSG has been recognized as one of the country's most connected public affairs firms. We have some of the most extensive relationships with political and community leaders/organizations in every major city and state in the nation. These relationships, based on our unique and longstanding work across the United States with partner companies and agencies, are bipartisan in nature and will be an invaluable asset to the City of San Diego. DSG capitalizes on these partnerships to help shape and influence public policy debates and to organize political and constituency groups that target decision makers.

DSG also has extensive experience analyzing the politics of government organization and transition. We have in depth academic knowledge about governance structures in cities across the United States. Our familiarity with a wide variety of organizational options including those in cities that have recently undergone change will allow us to offer solid recommendations and valuable expertise to San Diego during its transition.

### **B. DSG TALENT**

At DSG, what you see is what you get. We are a boutique firm with high impact players. Our bench contains senior, sophisticated, experienced and successful talents who have collectively advised on high-stakes political situations across the United States for over a decade. These principals and partners have relationships with local elected officials, community leaders and press in major metropolitan areas as well as the outlying suburbs and communities in these regions. The principals listed below are the people who will work directly with the City of San Diego.

#### **LESLIE MYERS**

Leslie Myers leads DSG's California practice in San Francisco. Myers background in public affairs and communications includes working as a Producer with NBC News in Washington DC, working on local, state and national campaigns, and

joining former White House Press Secretary Mike McCurry in launching Grassroots Enterprise, an online public affairs company. Myers also has extensive experience managing coalition building and community affairs in the Bay Area through her work with the San Francisco Board of Supervisors, Mayor's office and Planning Commission. At DSG, Myers specializes in issue management, local coalition building and strategic and communications counsel.

**JESSICA TROUNSTINE**

Jessica Trounstine is an Assistant Professor at Princeton University with a joint appointment in the Politics Department and the Woodrow Wilson School of Public and International Affairs specializing in urban politics and governance. Her primary research concerns the relationship between institutional changes in city government and representation. Trounstine received her PhD in American Politics from the University of California, San Diego in 2004. Her dissertation analyzed politics in 16 United States cities with divergent forms of government from council manager to strong mayor systems for 100 years between 1880 and 1980. She currently researches the effects of altering electoral and governmental structures in modern cities and teaches urban politics and policy at both the undergraduate and graduate level. In addition to her academic career Trounstine worked as a press aide for former Governor Gray Davis and conducted extensive research and data collection for the local policy and networking group, San Diego Dialogue.

**KAREN SKELTON**

Karen Skelton provides companies, non-profits, political leaders and individuals strategic counsel on complex projects involving a combination of political, legal, financial and communication issues. With a law degree from UC Berkeley's Boalt Hall and a Master's Degree from Harvard University's John F. Kennedy School of Government, Skelton is the Former Deputy Assistant to President Clinton and Political Director for Vice President Gore. In this capacity, Skelton was the chief point person on California policy issues for the administration. Previously, Skelton was also the Chief Counsel for the Federal Highway Administration and Attorney for the Department of Justice. Skelton leads DSG's California practice in Sacramento.

**SEAN SMITH**

Sean Smith is a nationally-recognized communications specialist uniquely qualified to assist on San Diego's transition process. He spent two years in the region teaching courses on politics, media and culture at the University of California, San Diego. He was a political analyst for San Diego's NBC 7/39 and published numerous columns in the San Diego Union-Tribune. He has provided communications services to

political campaigns, local governments, trade associations, labor unions and corporations in southern California and all across the country. He has written speeches, press remarks and Op-Eds for clients all over the world. Smith also holds a Masters degree from Harvard University's John F. Kennedy School of Government.

**CHARLIE BAKER**

Charlie Baker, founder of the Dewey Square Group, is an attorney with more than twenty years of experience in government, politics and law. Throughout his career, Baker has focused on the development of public strategies, the building of successful grassroots coalitions and the analysis of public law/policy issues in his role as senior advisor and consultant to some of the most preeminent corporations, campaigns, and non-profits in the country. Baker has also had a distinguished career in public service serving as Deputy Chief Secretary to Governor Michael Dukakis, Deputy Secretary of the Executive Office of Communities and Development and Assistant Secretary of the Executive Office of Administration and Finance for the state of Massachusetts. Baker was also a prominent figure in President Bill Clinton's transition team.

**BOB BUCKHORN**

Bob Buckhorn leads DSG's highly successful state and local affairs practice. Through nearly two decades of experience in politics and public policy, Buckhorn has developed a strategic understanding of the municipal process and extensive contacts in the field. Buckhorn's unique experience includes time served on the Tampa City Council and Tampa Bay Regional Planning Council. Previously, Buckhorn coordinated the successful campaign of Tampa Mayor Sandy Freeman and went on to serve as her Chief of Staff.

**MINYON MOORE**

Minyon Moore heads DSG's prestigious state and local affairs practice. Considered one of Washington, D.C.'s top strategic thinkers, Moore has had a distinguished 20 year career in both the public and private sectors. As the Chief Operating Officer of the Democratic National Committee, she was directly responsible for the day-to-day management and oversight of the Party's activities with an operating budget of \$60 million. A native Chicagoan, Moore also served as principal political advisor to President Clinton and was Director of White House Political Affairs. During her time at DSG, Moore has been instrumental in raising the profile of the National Conference of Democratic Mayors.

**LAUREN PAIGE**

Lauren Paige has been with DSG's Sacramento Office since 2003. During that time, she has worked closely with First Lady Maria Shriver's office on the California Governor's



Conference on Women and Families; worked on local, state and national campaigns; and managed coalition building around a variety of legislative and regulatory issues. Paige has also worked as a research assistant at the National Economic Development and Law Center, a community development non-profit, focusing on city economic development and mayor-community relations best practices and in the City of Tustin's city planning department. Paige graduated Phi Beta Kappa from UC Berkeley with a degree in political economy and city and regional planning.

### **III. REFERENCES**

#### **A. REFERENCE 1**

Donna Lucas  
Deputy Chief of Staff  
Office of the Governor of California, Arnold Schwarzenegger  
State Capitol  
Sacramento, CA 95814  
(916) 445-7097

#### **B. REFERENCE 2**

Alex Tourk  
Deputy Chief of Staff  
Office of San Francisco Mayor Gavin Newsom  
City Hall Room 200  
1 Dr. Carlton B. Goodlett Place  
San Francisco, CA 94102  
(415) 554-6615

#### **C. REFERENCE 3**

Zoltan Hajnal  
Assistant Professor  
Department of Political Science  
University of California, San Diego  
La Jolla, CA 92093  
(858) 822-5105

### **IV. PRICING**

We appreciate the truncated timeline to complete this project. We have therefore proposed two pricing options, with the expectation of completing the project by May, 2005. Should you determine there is more time to address specific steps, we will work with you to modify our pricing accordingly.

#### **A. \$130,000/PROJECT**

Manage entire scope of services to be completed by May, 2005, including, but not limited to:

- Formulate plan, timeline and benchmarks to the City of San Diego;
- Coordinate a cross-functional team made up of academic, political, policy and communications experts to gather and disseminate information to the City of San Diego;
- Coordinate research methods to identify San Diego's priorities;
- Create and manage a comprehensive clearinghouse of "best practices" for restructuring the executive and legislative branches of city government, to include:
  - Situation assessment reports, portfolios from field research on model governments;

- Synopsis reports from interviews conducted with integral local personnel in and experts outside of San Diego;
  - Restructuring processes; and
  - Gather data regarding effects of organizational options on council/executive relationships, budgetary concerns, ease of operation of administrative functions, and the policy making process.
- Manage ongoing relationship building with local key stakeholders, influencers and other community decision-makers whose opinions impact the success of the transition;
  - Cultivate and manage the development of strategic, high impact relationships with national key stakeholders and influencers; and
  - Develop and implement a public relations campaign aimed at educating citizens about the transition.

**B. \$35,000/MONTH**

Advise and participate in specific tasks in conjunction with other consultants, to include:

- Outreach and field research with model governments;
- Relationship building with national key stakeholders;
- Case studies of other cities' transitional experiences or organizational design; and
- Communication strategy and implementation

**V. CONCLUSION**

We are excited about this opportunity to work on such a meaningful project. We recognize our approach and background may differ from other firms responding to the RFQ, yet we are uniquely suited to work with you because of our varied backgrounds and areas of expertise. We look forward to speaking with you in more detail about your project, our recommended strategies and desire to work with you.

DSG Contact Information:

Leslie Myers  
PO Box 29089  
Building 36 Suite 200  
Presidio National Park  
San Francisco, CA 94129  
(415) 577-6072  
lmyers@deweysquare.com



RECEIVED  
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REAL ESTATE ASSETS DEPT.

Beth A. Murray  
Assistant to the City Manager  
City of San Diego  
1200 Third Avenue, Suite 1700  
San Diego, CA 92101

February 11, 2005

Dear Ms. Murray,

Miralto is pleased to submit a Statement of Qualifications ("SOQ") to assist the City of San Diego in its Strong Mayor Governance Transition Process.

Miralto is aware of the many structural, procedural and change management considerations a viable transition process must address-- specifically as it relates to the public sector. Our highly knowledgeable and experienced team has developed, through well-established and on-going relationships, the skills and methodologies to help the City define new governance structures and procedures and to work through implementation issues.

To engage the City in this effort, we have assembled a team with extensive qualifications:

- Numerous successes in supporting public sector and non-profit entities in organizational transformation and strategy
- Substantive backgrounds in governance issues for major public interests
- Direct experience in transitioning cities to strong mayor governance
- Familiarity with the City of San Diego government, economy and communities and
- Exceptional capabilities in change management and facilitation

This SOQ addresses the needs of the City of San Diego, the experience and qualifications of Miralto's team members, applicable projects and references, and fee structure. We submit this qualifications package with great enthusiasm and confidence in our team's ability to support the City of San Diego in a successful transition to a strong mayor governance structure.

If you have any questions regarding the qualifications of Miralto, please feel free to call me at (858) 759-5260.

Sincerely,

Paul Curcio  
President, Miralto

▲ ▲ ▲

**Statement of Qualifications  
City of San Diego  
Strong Mayor Governance Transition Process**

February 11, 2005

## MIRALTO'S UNDERSTANDING OF THE ENGAGEMENT

On November 2, 2004, the City of San Diego voters approved Proposition F to create a strong Mayor form of government for a trial period beginning January 1, 2006 and ending December 31, 2010. As the new form of government will be different from the present form of government in many substantive aspects, the City of San Diego is seeking assistance in the transition planning process as it changes from the Manager-Council form of government to the Mayor-Council form of government.

As specified in the RFQ, the City's primary goals are to:

- Identify the best organizational models used by other cities with a Strong Mayor form of government, for both the Executive branch and the Legislative branch
- Maximize public input during this information collection process
- Make recommendations as to which of these organizational models would work best for the City of San Diego

### Addressing Engagement Issues

Miralto offers the capability to address all aspects and phases of the governance transition process as sought and required by the City of San Diego. To succeed in this effort, we would initially consider three broad goals:

- A widely supported plan that is developed with the input from key stakeholders balanced by best practices and experiences of other cities
- A communication plan that conveys issues and output to staff members and to the public
- A process that promotes innovation and team building throughout the new organization

### Selection Criteria and Qualifications

We are proud that our Miralto team brings comprehensive experience with public sector agencies in organizational design, change management, public dialogue and facilitation, best practice research, strategic planning and performance management, information management systems and strategic communications. We can deliver the essential mix of skills and experience to plan and support the successful implementation of a new governance system. We are a company headquartered in San Diego with knowledge of San Diego combined with experts that worked with the City of Los Angeles which went through a similar transition. We have highlighted some of Miralto's qualifications for you to consider as you evaluate our proposal against your established criteria.

*Criteria #1: Professional qualifications of the consultancy team:*

- Cumulatively, Miralto's team of consultants have acquired well over a century of experience in leading and improving local government in California

- Our team includes academic personnel that are acknowledged experts, published authors, and scholars in multiple subject arenas pertinent to this engagement including Mayoral transition best practices, governance systems, and budgeting processes
- The team includes experienced, executive-level public administrators that have actively participated in the transition from weak to strong Mayor governance
- Miralto's principal in charge is a former member of San Diego's City Manager's team, has a San Diego headquartered business, has an extensive local and national resource network, and has worked as a consultant to the Mayor's Office in Los Angeles, the Los Angeles City Controller and the City Administrative Office as they transitioned their structures and processes to align with shifts in public expectations and a new charter
- Miralto's team members have earned many individual awards for leadership and scholarship for their professional endeavors
- Our team includes the authors of The City at Stake: Secession, Reform, and the Battle for Los Angeles, Governing America's Urban Areas and Los Angeles: Structure of a City Government.

*Criteria #2: Experience on projects of similar size and scope:*

- Miralto's team consists of academic experts and former public administrators that worked concurrently in various leadership roles on the Los Angeles Charter Reform implementation efforts (which included a significant power shift to the Mayor)
- Our team members have been retained in different capacities to aid other jurisdictions and agencies in government improvement initiatives and governance transitions
- Miralto's principal in charge and project director have worked together on numerous large-scale organizational change improvement efforts

*Criteria #3: Capability of the consultant to deliver timely and high quality services:*

- Miralto's breadth of experts and seasoned management consultants give us the flexibility to rapidly deliver the best team to successfully accomplish a given project
- Our ability to undertake all aspects of this project will ensure timely and seamless delivery of services and we are available upon notification to commence work
- We maintain low staff overhead through project specific team formulation that allows us to cost-effectively deploy individuals best prepared to do the work
- Miralto's principal in charge and project director have a proven track record of quickly framing critical issues, focusing work on distinct deliverables utilizing proven methodologies, yielding products of the highest quality

*Criteria #4: Reference Checks on Previous Projects:*

- Miralto is happy to provide the following references who are familiar with many team members and projects (a listing of project experience follows later in this document):

Trudy Sopp  
Co-Executive Director  
THE CENTRE for Organization Effectiveness  
World Trade Center San Diego  
1250 Sixth Avenue, Suite 150  
San Diego, CA 92101  
(619) 685-1339

Ms. Patricia Canfield  
Chief Administrative Analyst  
Office of the City Administrative Officer  
200 N. Main Street, Suite 1500  
Los Angeles, CA 90012  
(213) 978-7685

Mr. David Janssen  
Chief Administrative Officer  
713 Kenneth Hahn Hall of Administration  
500 West Temple Street  
Los Angeles, CA 90012  
(213) 974-1101

Mr. Dick Brumbaugh  
Chief Financial Officer  
Metropolitan Transit Authority  
One Gateway Plaza, Stop 99-25-12  
Los Angeles, CA 90012  
(213) 922-1097

Mr. Jerry Scharlin, Former Administrator  
Community Redevelopment Agency  
Los Angeles, CA  
(209) 937-8828

*Criteria #5: Professional fee schedule:*

- Miralto is committed to serving the public sector and discounts its rates accordingly
- Our proposed hourly rate structure is very competitive with other highly qualified and recognized firms and based on our understanding of this project and experience we would anticipate a blended rate for fixed fee work of approximately \$175 per hour.
- Team members reside in Los Angeles and San Diego Counties requiring nominal travel
- Our methods of actively engaging stakeholders in change processes increases institutional learning and the likelihood of creating sustainable change, which in turn, decreases consultant dependency



## **MIRALTO PERSONNEL**

Miralto brings a broad and deep skill set to our work in public sector agencies. We have provided brief biographies of team members who specialize in government transition and transformation, governance models, organizational and process design, change management, performance management, and communications-- skills particularly pertinent to San Diego's transition process.

Paul Curcio will serve as the Principal on the project and Ken Hale will be the Project Director and day-to-day Miralto contact. Keith Comrie, Bill McCarley, and Richard Dickinson offer their extensive records of service excellence as public agency leaders with specific experience in governance and Mayoral transitions; Dr. Raphael Sonenshein and Dr. Alan Saltzstein provide deep practical and research-based expertise related to public sector governance and city chartering, and Professor Uday Karmarkar will bring his expertise in operational, budgeting and IT systems required by governance structures. Other subject matter experts may be consulted on an as needed basis; team member utilization will depend on the final scope and timing of the project.

As this is a highly streamlined process, Miralto will work with a Project Manager from the City. The Project Manager will be responsible for facilitating internal information gathering, providing overflow resources in preparation of key deliverables, and for providing administrative support, particularly as it relates to scheduling internal meetings and associated logistics.

### **Paul D. Curcio**

Mr. Curcio has two decades of experience leading large and small organizations in both the public and private sectors. As a specialist in organizational design and strategy he has led teams to reengineer enterprises and operations for improved performance. Many of these efforts resulted in the creation of organizations and policies that have shaped urban form and infrastructure for cities, regions and states. His public policy forte is land use and transportation planning and he has consulted on public investment, growth management and infill development. His work in the private sector has supported many real property development projects from initial feasibility and land control strategy through development planning, land entitlement and final design.

As President of Miralto Management Consultants, Mr. Curcio has led and supported public policy development, strategic planning and organizational improvement efforts for many general service government agencies and elected offices including the Chief Administrative Office of the County of Los Angeles, the State of California Business, Transportation and Housing Agency, the City of Los Angeles Office of the Mayor, the City of Los Angeles Office of the Controller, the Los Angeles City Administrative Office, Los Angeles County Metropolitan Transportation Authority, Los Angeles Housing and Planning Departments and the Los Angeles Community Redevelopment Agency.

For the past decade at the UCLA Anderson School, Mr. Curcio has led the design and delivery of executive education programs that have successfully helped transform organizations and develop high performing team leaders. He served as president of Urban Innovations Group and was founding director of the Advanced Policy Institute at UCLA's School of Public Policy where he orchestrated the delivery of professional service and action research to respond to complex urban planning, transportation, architectural and public policy challenges.

Mr. Curcio has previously worked for the governor of Oregon as Director of the Department of Land Conservation and Development and was also chief urban designer for the City of San Diego where he was recognized as a problem solver for successfully balancing environmental, economic and social equity objectives and for leading teams of professionals to support citizen task forces in the creation and delivery of many break-frame ordinances, visionary plans and non-regulatory programs.

Mr. Curcio is a public speaker on aligning public and private development objectives and building performance driven government and has received many local, state and national awards for innovation and excellence in planning, public participation and urban development. He earned a Master's Degree with a concentration in development economics from the Kennedy School of Government at Harvard University. He is a licensed architect in California and holds a Master's Degree in Urban Design and a Bachelor's Degree in Arts and Science from the School of Architecture at the University of Illinois.

### **Ken Hale**

Mr. Hale brings over 15 years of organizational development and change management consulting experience serving federal, state, and local government agencies, Fortune 100 corporations, and start-up entities in capacities encompassing strategic planning, performance management, process design, communications planning, training development, and new venture planning.

Mr. Hale develops and tailors client-driven, outcomes-focused solutions for Miralto. His work with us has included comprehensive organizational effectiveness assessments; strategic planning linking mission, vision, strategies, performance measures, and budgets; high-performance organizational and work process design to support customer-focused service; and IT requirements planning. Public sector clients include the Los Angeles County Administrative Office, Los Angeles County Metropolitan Transportation Authority, Los Angeles Community Redevelopment Agency, Los Angeles City Office of Administrative and Reporting Services, California Youth Authority, and the City of Los Angeles Controller. Additionally, Mr. Hale has developed leadership and management workshops and programs for large public sector clients.

He previously worked at Andersen Consulting Change Management and Deloitte and Touche. Mr. Hale earned a BS in Economics from the Wharton School at the University of Pennsylvania.

## Keith Comrie

Mr. Comrie has a long and distinguished career with the City and County of Los Angeles. He was the City of Los Angeles City Administrative Officer and chief financial advisor reporting jointly to the Mayor and 15-member City Council. As CAO he provided steadfast leadership during the transition to the strong Mayor form of governance. Significant accomplishments include chairing the project management committee handling feasibility studies, financing, and construction of the Convention Center and Central Library; being the active liaison with federal and state governments for the Northridge Earthquake rebuilding effort; and serving as the key City negotiator for the new Staples Center.

He was Assistant Director, then Director of the County of Los Angeles, Department of Public Social Services (Welfare) where he saved taxpayers \$120 million annually through performance and productivity improvements. At the Los Angeles County CAO he undertook management and economic studies ranging from an audit of the Music Center to development of a general design for a computerized County budgetary control reporting system.

Mr. Comrie currently serves in consultative role to California government. As a consultant to the Executive Committee of the Entertainment Industry Development Corporation (EIDC), he supervised reorganization of the corporation and board of directors in a sensitive media and political environment. The project encompassed corporate financial operations, governance, line operations, and community and industry relations. He was the supervising Consultant for a best practices study for the Southern California Association of Governments (SCAG) covering association financial operations, human resources, computer systems, contracts, and state/federal relations.

Currently, Mr. Comrie chairs and serves on several boards including the Los Angeles Regional Airports Improvement Corporation overseeing financing authority for private airline construction; Exposition Park Intergenerational Complex, a non-profit corporation in charge of a \$29 million private/public project to reconstruct the 1932 Olympic Swim Stadium complex; and Chair of the MPA Advisory Board, University of Southern California School of Policy, Planning and Development Board of Councilors.

Among his service and merit awards are: City and State Magazine, Best City Administrative Officer in America Award; the American Society for Public Administration Clarence Dykstra Award "for a government employee, researcher or teacher who has made an outstanding contribution to good government"; and the University of Southern California School of Public Administration Fletcher Bowron Award "for achievement in urban administration."

Mr. Comrie graduated from the University of Southern California with a Masters of Public Administration and a Bachelor of Science Degree in Accounting.

## **Bill McCarley**

Mr. McCarley is a veteran public administrator bringing over 30 years of service in local government. He has been recognized for his leadership abilities in a series of appointments within multiple mayoral administrations in the City Los Angeles. He was Assistant Chief Administrative Officer where he oversaw and monitored City budgets, revenue, and expenditures. He next served as Chief Legislative Analyst for Los Angeles while managing the research and administrative oversight for City offices in Sacramento and Washington D.C. He served as the Mayor's Chief of Staff in the Riordan administration before heading up a besieged Department of Water and Power where he is credited for a tough minded restructuring and turnaround. Since retiring from City service in 1997, he has continued to advise government and public works, notably as special consultant and board member of the Planet Electric Corporation and as interim General Manager for the Pasadena Water and Power Department.

Mr. McCarley brings a keen understanding of public management complexities and was a prominent figure in City government during the Los Angeles transition to a strong Mayor form of government. He brings the multiple perspectives of someone that knows the reality of leading from the Mayor's Office, supporting a City Council in their role as the legislative body with a strong Mayor and from an enterprise department. He received his B.S. in Political Science and Economics from California Polytechnic University, Pomona and his Masters in Public Finance and Administration from the University of Southern California.

## **Dr. Raphael J. Sonenshein**

Dr. Sonenshein is Professor of Political Science at California State University, Fullerton. He served as Executive Director of the City of Los Angeles (Appointed) Charter Reform Commission between 1997 and 1999 and played a key negotiation role in the design of an enhanced office of the mayor and in the completion of the first successful comprehensive reform of the Los Angeles Charter in 75 years. In 1999, he was selected as principal consultant to the City of Pasadena Charter Reform Task Force on School District Governance. He wrote a report calling for major changes in the school district, which was placed on the November 2000 ballot, and received 75% of the vote. In 2004-2005, he has served as principal consultant to the Glendale Charter Review Committee, the Riverside Task Force on Neighborhood Governance, and the Culver City Charter Reform Committee.

In 2001, Dr. Sonenshein was selected as the second Fellow of the John Randolph Haynes and Dora Haynes Foundation, acted as a liaison between the Foundation and the academic community, and helped develop the Foundation's initiative in the area of governance of the Los Angeles region. In September 2002, he organized a scholarly conference on the reform of Los Angeles government.

He has written extensively on the politics and governance of Los Angeles. Dr. Sonenshein's book, The City at Stake: Secession, Reform, and the Battle for Los Angeles, was published by Princeton University Press in 2004 and he is currently at work on the book, Los Angeles: Structure of a City Government. His book Politics in Black and White: Race and Power in Los

Angeles (Princeton University Press, 1993) received the 1994 Ralph J. Bunche Award from the American Political Science Association as the best political science book of the year on the subject of racial and ethnic pluralism. He received his B.A. in public policy from Princeton University, and his M.A. and Ph.D. in political science from Yale University.

### **Dr. Alan Saltzstein**

Dr. Saltzstein is Professor of Political Science and Chair of the Division of Political Science and Criminal Justice at California State University, Fullerton. Dr. Saltzstein is a former Assistant City Manager and has a wide range of contacts in many city governments. Additionally, he worked as a consultant for the Los Angeles City Charter Commission. He served on the Executive Committee of the National Association of Schools of Public Affairs and Administration (NASPAA) and was a member of the Commission on Peer Review and Accreditation of NASPAA. He has frequently served as a site reviewer for NASPAA and the California State University system.

Dr. Saltzstein is the author of Governing America's Urban Areas (2003, Thompson - Wadsworth) and articles in many journals including the Public Administration Review, the Political Research Quarterly, the American Review of Public Administration and the Social Science Quarterly. He holds a Ph.D. in Political Science from the University of California at Los Angeles and a Masters in Public Administration from the University of Minnesota.

### **Richard Dickinson**

Mr. Dickinson has over 26 years of experience with the City of Los Angeles City Administrative Office. He was the lead analyst on Charter reform providing briefings on both the committee work and subsequent implementation efforts as Los Angeles transitioned to a strong Mayor form of government. He has served as chief of the Budget and Finance Group compiling and monitoring the overall city budget; served as chief of the Grants Group that oversees and reports to the Mayor and Council on all grant funding applications and awards as well as the city's redevelopment efforts; and coordinated the team that put together all staff analysis and reports for the Mayor, Council and LAFCO regarding secession proposals.

As chief of the Public Safety Budget group he compiled the police, fire, animal regulation and building and safety budgets and coordinated a variety of special studies, reports and audits of programs, organizations and public policy matters for the City. He also served as chief accounting employee of the 1984 Olympic Games Trust Fund, participated in the Olympic Games bid, coordinated revenue and budget expenditures for city Olympics services, and prepared all staff reports on the subject to the Mayor and Council.

In three and one-half years with the Personnel Department of the Los Angeles Unified School District Mr. Dickinson has conducted organization and position audits and provided staff support to the Superintendent of Personnel and to the Clerk of the Board. He holds a Masters in Public

Administration and Finance from the University of Southern California, and a Bachelor in Public Administration and Finance from California State University, Northridge.

**Dr. Uday S. Karmarkar**

Dr. Karmarkar is the Times Mirror Professor of Management Strategy and Policy, director of The Center for Technology Management and Director of Research for the Center for Management in the Information Economy at The Anderson School at UCLA.

Professor Karmarkar has conducted consulting and research projects for over 50 manufacturing and service organizations in the public and private sectors. He has led successful efforts in information technology, industrial marketing, supply chain and distribution management for organizations such as the Los Angeles County Metropolitan Transportation Authority, World Bank (IBRD), EXIM Bank, Eastman Kodak, Ford Motor, GM, and IBM. He has also developed and taught executive MBA programs and short-course programs in the U.S. and Europe. In Los Angeles, he has been instrumental in customized management programs for the Los Angeles Department of Water and Power, Community Redevelopment Agency and Metropolitan Transit Authority among many others.

He is widely published and has presented lectures, tutorials, seminars, addresses and research papers to companies, industrial groups, research conferences, and academic institutions. His research interests include operations strategy in manufacturing and service firms, quality and performance measurement, technology management, and operations in information based industries.

Dr. Karmarkar has a B.Tech. from I.I.T. and a Ph.D. from MIT (Sloan). Prior to joining the Anderson School, he was the Xerox Professor of Operations, Director of the Center for Manufacturing and Operations, and Faculty Director of Executive Seminar Programs at the Simon School, University of Rochester. He previously taught at the Graduate School of Business at the University of Chicago.

## SELECTED PROJECTS CONDUCTED BY MIRALTO

We are proud that the Miralto team brings extensive experience with public sector agencies in projects encompassing governance, organization design, change management, facilitation, strategic planning, and communications-- all facets of the challenges faced by the City of San Diego in its transition. Below are examples of pertinent projects that proposed Miralto team members have performed. For your convenience, previously identified client references are restated with the appropriate projects below.

### **City of Los Angeles Community Redevelopment Agency (CRA)**

Miralto was selected by the City of Los Angeles Community Redevelopment Agency (CRA) to help in agency reorganization. Miralto services included the delivery of workshops, training and meeting facilitation to help produce a strategic plan. Additionally, our work included expert consultation in redesigning the Agency to become a more project-centered organization. Engagement outcomes included complete mission, vision and goal statements, the redesign of the organizational structure, and the streamlining of core work processes including the annual budget, multi-year budget, and annual strategic plan. The impact of the engagement has been the reorganization of the Agency and the production of a balanced budget with allocated resources being tied to measurable results. Our most recent work included performance specifications for improved procurement, a project chartering system, and development and implementation of an IT strategic plan that assures convergence of system investments that fully support new improved processes.

In order to build internal capacity and help the internal change effort, we designed and delivered several custom academies including, *Creating and Leading the Project-Centered Organization*, for senior and project managers in conjunction with UCLA's Anderson Graduate School of Management. To integrate the educational effort into the organization, we provided post-academy, on-site consulting assistance in support of their organizational change and improvement efforts. The CRA has since asked us to deliver subsequent offerings for new senior and project managers. *Stated Reference: Jerry Scharlin, Former Administrator.*

### **County of Los Angeles Chief Administrative Office (CAO)**

Miralto provided workshops, training, and meeting facilitation services to produce a Strategic Planning Framework for the County consisting of a vision, mission, goals, objectives, strategies and a performance measurement structure. The work products have resulted in an on-going dialogue with County leadership to advance results-oriented planning and budgeting. The long-term impact has been to provide the foundation for strategic planning efforts across all County departments, linked back to the core framework developed with the CAO. This has advanced County accountability at all levels. We were retained for ongoing department-specific strategic plans including a strategic plan for the department of the Auditor and Controller. *Stated Reference: David Janssen, L.A. County Chief Administrative Officer.*

### **Los Angeles County Metropolitan Transportation Authority (MTA)**

Miralto has been retained for numerous engagements to assist the MTA in support of their strategic planning, organizational restructuring, process improvement, IT assessment and performance measurement efforts. In developing a strategic planning framework Miralto investigated other leading transportation agencies and companies in order to determine the best practices and processes for the MTA and interviewed key internal and external stakeholders to customize a plan. The current Strategic Business Plan is moving beyond earlier efforts by hardwiring accountability for the dual roles of the Agency through an organizational design and a formalized strategic management system. The impact of the strategic framework and strategic management system is currently driving the articulation of specific and measurable objectives that are in turn driving the detailed development of management action plans by which the annual and five-year budgets are shaped.

Our work has also included restructuring studies for the Transportation Planning and Development Group providing them a means of integrating complex multi-disciplinary systems work across numerous internal and external participants. We also have provided technical assistance and expert support in framing complex policy questions and supporting analysis to optimize benefits from large investments under funding source and use constraints and uncertainty. We also completed an assessment of core processes to assure convergence and thoughtful integration and sequencing of mission critical information technology and systems investments. *Stated Reference: Dick Brumbaugh, Chief Financial Officer and Educational Partner Trudy Sopp, Co-Executive Director, THE CENTRE for Organization Effectiveness*

### **Office of Administrative and Research Services for City of Los Angeles**

A new City Charter for the City of Los Angeles changed the Office of the City Administrative Officer to the Office of Administrative and Research Services (OARS) in July 2000. A name change, more than 30 percent staff reduction, and significant pressures to redefine its role in City administration, OARS selected Miralto to design a forum to begin addressing critical issues. We designed and delivered a workshop for the executive and senior management team to: establish a strategic framework to drive future improvement efforts and related decision making; identify a mechanism to measure and continually improve customer satisfaction with CAO services; develop an approach to define an organizational architecture designed for efficiency and effectiveness; and define a workload allocation strategy to balance the workload for Fiscal Year 2000-2001. Since then, we have assisted OARS in its improvement processes through individual executive coaching, facilitated team meetings and follow up team workshops on core work processes, competencies and information systems. *Stated Reference: Ms. Patricia Canfield, Chief Administrative Analyst*

### **City of Los Angeles, Office of the Controller**

The Office of the Controller engaged Miralto to develop a comprehensive strategic plan to effectively focus its limited resources, build a more flexible and responsive organization, and initiate a greater proactive leadership stance in its newly evolving role in the City. We utilized our strategic planning methodology, and the Controller-- through a series of interactive



workshops, focused client teamwork, online forums and surveys, and tailored diagnostic tools--created a plan (vision, mission, goals, strategic intent, objectives, performance measures) over the course of three months.

The combination of instructive and participative workshops and targeted expert consultation, allowed the Office of the Controller to develop an understanding of the strategic planning process and a capacity for carrying the process forward. *Stated Reference: Ms. Patricia Canfield, Chief Administrative Analyst*

### **City of Los Angeles Department of Water and Power (DWP)**

In partnership with The Anderson Graduate School of Management at UCLA, we designed and delivered a two-day retreat for senior executives to focus on strategic issues including deregulation, scarce resource management, Board governance, organizational culture, process improvement and strategic human resources. Professor David Lewin served as Faculty Director while Mr. Paul Curcio was Program Director. We subsequently delivered a series of 10-day *Civic Enterprise Leadership and Management Program* for executives and a series of three-day follow up programs for senior managers.

### **City of Los Angeles, Office of the Mayor**

As Miralto's principal in charge, Paul Curcio served as an advisor to the Office of the Mayor and lead consultant to the Development Reform Committee charged with reviewing the development process in the City of Los Angeles. Miralto identified impacts on the local economy through interviews, workshops, and benchmarking research, and recommended regulatory and organizational reforms to make the city more business friendly. The recommendations led to streamlining the permitting process, a re-examination of investment for public infrastructure, and re-engineering government for customer service with a special focus on how department heads reported to the Mayor's Office to hardwire accountability.

## PROJECT FEES

As a part of our engagements Miralto will generally undertake project scoping to understand, address, and build consensus on key stakeholder requirements and expectations. Although specific project tasks are to be defined and scoped, general tasks may include:

### Project Scoping

- Meeting
- Working Session

### Benchmarking/Best Practices

- Interviews
- Consultation
- Primary and Secondary Research

### Public Input

- Online forum implementation
- Public information sessions

### Advisory Services

- Meetings
- Recommendations

We are pleased to provide our consulting services at a discounted public sector hourly rate.

<i>General Work Classification</i>	<i>Public Sector Rate</i>	<i>Private Sector Rate</i>
Principal	\$200-275	\$350-375
Project Manager	\$155-190	\$250-275
Senior Consultant	\$125-150	\$200-225
Research Associate	\$75-100	\$100-125
Content Specialist	\$150-225	\$250-325

It is understood that the project has an accelerated timeline due to the fact that input on certain issues is needed prior to the City's fiscal year budget discussions and that final reports and findings will be due by May 2005. Shorter timelines may require increased hours or greater staffing levels.

In this kind of engagement Miralto will often enter into a fixed fee arrangement so we would be happy to discuss this option based upon final negotiated scope and deliverables that meet your priorities and constraints. Given our current understanding of the project we have estimated an approximate average hourly rate of \$175. Final project cost and average rate will be driven by scope negotiations with the City of San Diego.