

# ABINGTON TOWNSHIP

**JULY 20, 2022**



## STRATEGIC PLAN COMMITTEE



# TOWNSHIP OF ABINGTON

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## *STRATEGIC PLAN COMMITTEE*

### **A G E N D A** **July 20, 2022** **7:00 PM**

There are three ways for the public to participate in the meeting: online, by phone, or an in-person viewing room. Residents can access the meeting online by a computer, iPad, iPhone, or Android at <https://us06web.zoom.us/j/86786626018>. This link will enable residents to hear the meeting and see presentations. There will be no video capabilities. Residents, who are unable to join online, can listen to the meeting by calling 1-929-436-2866 and entering the meeting ID number 867-8662-6018 when prompted. Residents, who are unable to join online or by phone, can watch, hear, and participate in the meeting in a viewing room at the Abington Township Municipal Building located at 1176 Old York Road, Abington, PA 19001.

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#### **CALL TO ORDER**

#### **CONSIDER APPROVAL OF MINUTES**

- a. Motion to approve the Minutes from the Strategic Plan Committee Meeting of May 25, 2022.

#### **UNFINISHED BUSINESS**

#### **NEW BUSINESS**

- a. Review and discuss progress, strengths/weaknesses/opportunities and challenges learned, and consider potential outcome areas and next steps.

#### **PUBLIC COMMENT ON NON-AGENDA ITEMS ONLY**

#### **ADJOURNMENT**

## **BOARD POLICY ON PUBLIC PARTICIPATION**

### *For Information Purposes Only*

The Township shall conduct business in accordance with the Commonwealth of Pennsylvania Laws governing the conduct of public meetings and only establish guidelines that shall govern public participation at meetings consistent with the law.

Each commenter shall:

- Direct their comments to the Presiding Officer;
- Speak from the podium or into a microphone designated by the presiding officer;
- State their name for the record;
- Either orally or in writing provide their address for the record;
- Have a maximum of three minutes to make their comments. Each commenter when speaking to a specific agenda item, is to keep their comments relative to that identified agenda item;
- Speak one time per agenda item;
- When commenting on non-agenda items, the commenter is to keep their comments related to matters of the Township of Abington, Montgomery County, Pennsylvania.
- State a question to the Presiding Officer after all commenters have spoken, and;
- Be seated after speaking or upon the request of the presiding officer;
- Not engage in debate, dialogue or discussion;
- Not disrupt the public meeting, and;
- Exercise restraint and sound judgement in avoiding the use of profane language, and the maligning of others.

The stated meeting of the Strategic Plan Committee of the Board of Commissioners of the Township of Abington was held on Wednesday, May 25, 2022, via webinar with Chairman Commissioner Bole presiding.

**CALL TO ORDER:** 6:05 p.m.

**PRESENT:** Commissioners Chairman BOLE, Vice Chairwoman SCHREIBER (6:22 p.m.), WINEGRAD, CARSWELL, HENRY

Also Present: Township Manager MANFREDI  
Commissioners SPIEGELMAN, THOMPSON

**CONSIDER APPROVAL OF MINUTES**

Commissioner Bole made a MOTION, seconded by Commissioner Carswell to approve the minutes of the Strategic Plan Committee Meeting of April 6, 2022.

MOTION was ADOPTED 4-0. Commissioner Schreiber was not in attendance at this time.

**UNFINISHED BUSINESS:** None.

**NEW BUSINESS:**

Discuss and consider a recommendation for the Strategic Plan consultant:

Manager Manfredi explained that in 2019, the Board of Commissioners began budgeting, operations, and prioritizing the strategic planning process, and tonight, the Strategic Plan Committee will discuss and consider hiring a Strategic Plan consultant.

Commissioner Bole added that one of the first steps for the Strategic Plan Committee was to issue an RFQ (Request for Qualification), which was posted on the Township's website on March 2, 2022. As a result of the RFQ, nine consultants submitted proposals ranging in cost between \$24,000-\$96,000.

During our first Strategic Plan Committee meeting, we discussed qualities and backgrounds of consultants that includes making sure flexibility and creativity is part of the vendor's approach, so the Township can gather as much information from all relevant stakeholders to be as effective as possible; also, diversity and expansiveness in the firm's client base having experience working with municipalities.

We explored during the interviews what the final product should look like with primary importance that the deliverable is practical, actionable, and measurable, and considered how other municipalities have adopted and used similar types of strategic plans. Also, it is important to have a strategic plan that would be interconnected with other plans of the Township such as Stormwater Management Plan and the Comp Plan.

After evaluating nine proposals, three candidates were invited for interviews, and tonight, we are joined by Ms. Julia Novak, Executive Vice President of Raftelis, who would serve as project director.

Ms. Julia Novak said that Raftelis has assisted local governments throughout the U.S. with strategic planning and performance management. The strategic planning process will be approachable, actionable, and implementable for the Township and her team will ask the Township to consider what they know to be true today as a community; what are the future goals and vision; and how will it be implemented.

Proposed scope of services begins with understanding the context and working with Township Administration; interviewing elected officials; listening sessions with Chairs of Boards and Commissions; survey of Township employees and develop an environmental scan that includes a trend analysis; and then ultimately, have the Board of Commissioners adopt the entire strategic plan. We plan to engage with employees to develop mission and value statements; develop preliminary vision and outcomes areas; solicit community input on the framework, and then finalize that framework with the Township.

Presented were several styles of implementation templates used by the team for other organizations, and once the framework is completed, the team works with the Township to identify metrics to show whether they are moving the needle in accomplishing its goals and identify what is being done to support the outcomes.

Development of final deliverables includes innovative approaches such as virtual engagement, visual facilitation, anonymous polling, trends analysis, one-page strategic framework, and high-quality, easy-to-communicate deliverables.

Commissioner Bole asked for further clarification on environmental scans.

Ms. Novak replied that environmental scans create a common base of knowledge for everyone who will be participating in the strategic planning process by providing data on demographic trends of the community; engage with the Township's Boards and Commissions about the strengths and weaknesses of the Township; and then put all of that information in one place so when the vision is established and the goals are set, there is a shared understanding of the starting point.

Commissioner Bole asked for any comments from Commissioners.

Commissioner Winegrad asked about the timeline of when the Township can begin using the data and analysis.

Ms. Novak replied after the contract is approved, work would begin in July taking 20-24 weeks for completion and the framework would be completed by the fall for the Township's budgeting purposes.

Commissioner Winegrad asked how much staff input will be needed?

Ms. Novak replied vision and outcomes are informed by the community and Township staff, and agreed to, and developed by the elected officials, and the mission and values should reflect the work of the Township. Once we have the framework, then we move to the implementation phase.

Commissioner Carswell asked for further clarification on working with the public helping them understand the strategic planning process.

Ms. Novak replied the format used in getting community engagement is a technique called, *World Café* where roundtables are set for each goal as well as a table for the vision and then we spend time speaking with the neighbors about what fiscal sustainability means to Abington Township. Notes of the discussion are taken, and a final report will be provided.

Commissioner Schreiber commented that one of her frustrations as a commissioner is that no action has resulted from some previously written plans, so she wants to be sure that this would not be another one placed on a shelf, and that there will easy actionable steps to take to implement this plan. Also, she asked about other organizations where action steps were taken moving them forward.

Ms. Novak replied that the implementation step is intentional where the team works with the Township to form implementation teams sharing ownership for achieving the result in the goals' statement.

Commissioner Henry asked for an example of one of the most exciting improvements that resulted from this type of plan being put into action by other organizations.

Ms. Novak replied there is a community in Lancaster, Texas where it was gratifying to see the improvements made over a few years.

Commissioner Winegrad asked about the timeframe for the plan itself.

Ms. Novak replied that the strategic plan framework has lasting power, although the priorities may change every year or two.

Commissioner Carswell made a MOTION, seconded by Commissioner Schreiber to recommend entering into a contract with Raftelis based on the proposal that was submitted for discussion and vote at the full Board of Commissioners Meeting on June 9, 2022, at 7 p.m.

Commissioner Bole asked for any public comments.

A resident expressed concern that this should be a process driven by the citizens, and there was just a tax increase, and we will have to pay for this too.

Lora Lehmann, resident, expressed concern about the timeline where the residents will be part of a few online townhalls after it is put together, and it is not what this Township needs.

MOTION was ADOPTED 5-0.

**PUBLIC COMMENT ON NON-AGENDA ITEMS ONLY:**

Lora Lehmann, resident, commented that the strategic plan for this Township should be to deal with the needs and wants of the residents.

**ADJOURNMENT:** 7:04 p.m.

Respectfully submitted,

Liz Vile, Minutes Secretary



STRATEGIC PLAN COMMITTEE

AGENDA ITEM

July 20, 2022

DATE

Administration

DEPARTMENT

AGENDA ITEM NUMBER

FISCAL IMPACT

Cost > \$10,000

Yes  No

PUBLIC BID REQUIRED

Cost > \$20,100

Yes  No

AGENDA ITEM:

Strategic Plan

EXECUTIVE SUMMARY:

This is a Strategic Plan update, review and next steps, consistent with the proposal that was accepted at the June 9, 2022 Board of Commissioners meeting, attached is the proposal for reference.

PREVIOUS BOARD ACTIONS:

n/a

RECOMMENDED BOARD ACTIONS:

Review and discuss progress, strengths/weaknesses/opportunities and challenges learned, and consider potential outcome areas and next steps.



# Abington Township

Strategic Planning Consultant

STATEMENT OF QUALIFICATIONS / MARCH 18, 2022

**Contact:** Julia Novak, Executive Vice President  
19 Garfield Place, Suite 500, Cincinnati, OH 45202  
Phone: 513.221.0500 / Email: [jnovak@raftelis.com](mailto:jnovak@raftelis.com)



March 18, 2022

Ms. Theresa Castorina  
Executive Assistant to the Township Manager  
Abington Township  
Office of the Township Manager  
1176 Old York Road  
Abington, PA 19001

**Subject: Statement of Qualifications for Strategic Planning Consultant**

Dear Ms. Castorina:

We are pleased to submit this proposal to provide Abington Township (Township) with strategic planning consulting services. We are dedicated to providing management consulting services, including strategic planning facilitation, to local governments.

We believe our firm offers the Township some distinct advantages:

- **A workable and insightful approach:** Our team’s approach specifically addresses the Township’s needs and will help develop a best practice-level strategic planning process and resultant Implementation Roadmap. Our proven methods of engagement and facilitation will lead to a community-informed strategic plan and will provide the Township with a vision, mission, and measurable goals now and into the future.
- **Use of unique and innovative tools and techniques:** We are passionate about strategic planning, which drives us to use innovation and creativity throughout the project, from engagement to the preparation of the final plan. We encourage future-focused discussions and action-oriented approaches to building the Township’s plan. We have actively engaged in strategic planning processes with communities nationwide using a variety of in-person and virtual tools and processes to ensure robust participation. Our deliverables are useful and engaging, and we use unique and creative graphics to keep documents concise and accessible for both internal and external audiences.
- **Personal service from senior-level consultants:** You appreciate it when deadlines are met, phone calls are returned, and your challenges are given in-depth, out-of-the-box thinking. While some firms may assign your business to junior-level people, we offer exceptional service from senior-level consultants.

We have had significant success working with community members, elected officials, department leadership teams, and staff to identify priorities for an organization or a community and achieve consensus. We are confident our approach will provide the Township with the direction it seeks for the future of the Abington Township community.

We look forward to the opportunity to serve the Township. Please contact me at should you have any questions.

Sincerely,



**Julia Novak**

*Executive Vice President*

Phone: 513.221.0500 / Email: jnovak@raftelis.com



Making our world better.

The Raftelis Charitable Gift Fund allocates profits, encourages employee contributions, and recognizes time to charitable organizations that support:

- Access to clean water and conservation
- Affordability
- Science, technology, and leadership

Raftelis is investing in improved telecommunication technologies to reduce the firm's number one source of carbon emissions—travel.



Diversity and inclusion are an integral part of **Raftelis' core values.**

We are committed to doing our part to fight prejudice, racism, and discrimination by becoming more informed, disengaging with business partners that do not share this commitment, and encouraging our employees to use their skills to work toward a more just society that has no barriers to opportunity.

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Client List

# Contact Information

**Organization:**

Raftelis Financial Consultants, Inc. (DBA Raftelis)  
227 W. Trade Street, Suite 1400, Charlotte, NC 28202  
Phone: 704.373.1199

**Ownership:**

Privately owned by shareholders

**Contact Person/Principal:**

Julia Novak, Executive Vice President  
Phone: 513.221.0500 / Email: jnovak@raftelis.com

**Date established:**

May 10th, 1993 (incorporated on April 23, 2004 (certificate #106073179-1))

**MBE/WBE Status:**

Not applicable

# Who We Are

## RAFTELIS AND THE NOVAK CONSULTING GROUP, HELPING LOCAL GOVERNMENTS AND UTILITIES THRIVE.

Local government and utility leaders partner with Raftelis to transform their organizations by enhancing performance, planning for the future, identifying top talent, improving their financial condition, and telling their story. We've helped more than 600 organizations in the last year alone. We provide trusted advice, and our experts include former municipal and utility leaders with decades of hands-on experience running successful organizations. People who lead local governments and utilities are innovators—constantly seeking ways to provide better service to the communities that rely on them. Raftelis provides management consulting expertise and insights that help bring about the change that our clients seek.

### TNCG is Now Raftelis

The Novak Consulting Group (TNCG) and Raftelis have always shared a focus on delivering lasting solutions for local government agencies. In January 2020, TNCG joined Raftelis. Today, we provide our clients with wide-ranging capabilities and resources in financial, management, technology, and communications consulting for all areas of local government. Our clients now have the expertise of more than 130 of the country's leading local government and utility consultants, who have decades of experience. We know that our combined capabilities and resources will provide added value to our clients, and we're excited about what we can accomplish together.

[+ VISIT \[RAFTELIS.COM\]\(https://raftelis.com\) TO LEARN MORE](#)



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



#### RESOURCES & EXPERTISE

Our project team is passionate about strategic planning and organizational optimization. Each member of our team specializes in strategic planning and has devoted their careers to assisting with local government strategic planning.



#### DECADES OF COLLECTIVE EXPERIENCE

Our associates and subject matter experts have decades of experience in strengthening local municipalities and utilities. They've served in a wide range of positions, from city manager to police chief to public works director, and they have led dozens of strategic planning initiatives for utilities across the country.



#### PERSONAL SERVICE FROM SENIOR-LEVEL CONSULTANTS

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



#### NICHE EXPERTISE

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



#### PROVEN PROCESS

We will implement a proven and unique facilitation process that engages internal and external stakeholders, links strategy to performance, and sets the organization up for effective implementation. We will use several techniques, some of which are innovative and others that are more classic approaches.

**29** years  
serving local  
governments  
and utilities

# How we stack up

## OUR TEAM INCLUDES

**130+** consultants focused on  
finance/management/communication/  
technology for local governments and utilities

## RAFTELIS HAS PROVIDED ASSISTANCE FOR

**1,200+** local governments  
and utilities

that serve more than

**25%** of the  
U.S. population

including the agencies serving

**38** of the nation's  
50 largest cities

in the past year alone, we worked on

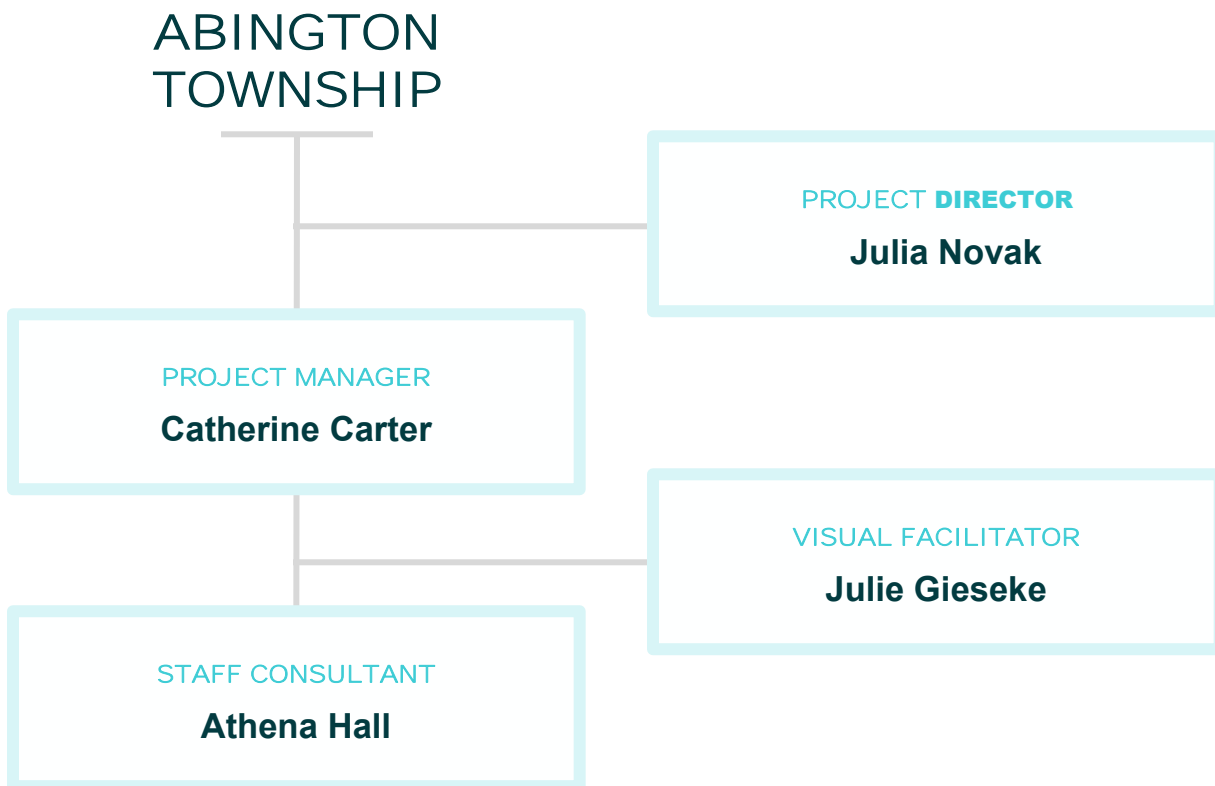
**1,000+** projects for **600+** agencies in **46** states

# Project Team

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

Our project team is made up of senior-level consultants with direct local government experience. What sets our project team apart is our ability to explore and relate to local community values while ensuring that participants are engaged, listened to, and reflected in the resulting plan.

An organizational chart of our project team is shown here. We have provided resumes for each of our project team members on the following pages.



# Julia Novak

PROJECT DIRECTOR  
Executive Vice President

## ROLE

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

## PROFILE

Julia established The Novak Consulting Group in September 2009. Her reputation and experience as a consultant who offers practical and implementable recommendations are grounded in more than 15 years of active service to local governments, including Fort Collins, Colorado; Lexington, Massachusetts; Rockville, Maryland; and as the city manager of Rye, New York. She is a practitioner first who has expanded her knowledge and expertise as a consultant for hundreds of organizations across the United States.

Julia has extensive experience as a facilitator and trainer. She has worked with both elected and appointed officials from jurisdictions throughout the United States to conduct goal setting, develop strategic plans, and prioritize service delivery. She has conducted training for elected officials as an individual trainer and through the National League of Cities and a consortium of cities in California.

Julia is an established thought leader in the areas of governance and administration. In April 2002, Julia was one of 20 practitioners who participated in the ICMA-sponsored symposium on the future of local government administration. Her response to Dr. James Svara's paper, "City Council, Roles, Performance, and the Form of Government," is included in the ICMA-published book, "The Future of Local Government Administration." Public Management Magazine has published multiple articles that she authored and co-authored, including "Preparing Councils for Their Work," co-authored with Dr. John Nalbandian; "Permission to Manage" which discusses the importance of using data to manage local governments; "Dreams That Make a Difference" on the value of community based strategic planning; "Civility," and most recently, "Using Data in Police Management."

Julia has been a speaker at national conferences for the ICMA, National League of Cities, and American Society of Public Administrators. She has been a featured speaker/trainer for many state associations and local government affiliate organizations throughout the United States.

Julia earned a bachelor's degree in government and politics from George Mason University and a master's degree in public administration from the University of Kansas. Julia was in the first class of individuals certified by ICMA as Credentialed Local Government Managers and maintains that designation. Julia is a Master Facilitator of the popular Myers-Briggs Personality Type Indicator and is certified to administer several other Level B psychological assessments.



## Specialties

- Strategic planning
- Facilitation
- Effective organizational leadership and management
- Supporting effective governance
- Developing organizational capacity

## Professional History

- Local Government Consulting (2003-2020)
- City of Rye, New York: City Manager (2000-2003)
- City of Rockville, Maryland (1995-2000)
- Town of Lexington, Massachusetts (1992-1995)
- City of Fort Collins, Colorado (1987-1992)

## Education

- Master of Public Administration - University of Kansas (1988)
- Bachelor of Arts in Government and Politics - George Mason University (1986)

## Certifications

- Certified Professional Manager, International City/County Management Association
- Master Facilitator, The Myers-Briggs Personality Type Indicator

## Professional Memberships

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

# Catherine Carter

PROJECT MANAGER

Senior Manager



## ROLE

As Project Manager, Catherine will serve as the City’s main point of contact for the project and as lead facilitator for workshops. She will supervise the work of the consulting team to ensure the project is of high quality, on time, and on budget.

## PROFILE

Catherine has more than a decade of experience facilitating local government and utility strategic planning processes, as well as considerable expertise conducting assessments of organizational effectiveness practices. With a background in public administration and environmental management, she possesses extensive stakeholder engagement, process design, research, and analytical skills.

Catherine has led or supported numerous strategic planning engagements, ranging in size from governing body retreats to set community goals to large-scale, full organizational efforts involving hundreds of internal and external stakeholders. Recent experience includes governing body retreats with Lafayette (CO), Nantucket (MA), Sugar Land (TX), and Minot (ND). Examples of department-level strategic plans include the Sewerage and Water Board of New Orleans (LA), the District of Columbia Department of Public Works (DC), Charlotte Water (NC), and Nashville Metro Water Services (TN). Finally, Catherine has also recently facilitated full-municipality or county strategic plans with the Cities of Gaithersburg (MD) and Avondale (AZ), as well as Jefferson County (CO).

In addition to strategic planning activities, Catherine has also worked on numerous management studies and organizational assessments. She specializes in issues related to water, wastewater, and stormwater utilities; customer service policies and practices; and other challenges facing public sector organizations across the country. Major initiatives in the last few years include a customer service assessment for Fairfax Water (VA), which included the organization’s first-ever customer satisfaction survey; development of a governance framework and structure for the Western Intake Partnership (NC), an organizational structure review and support for realignment for the Anchorage Water and Wastewater Utility (AK), and customer policy manual updates for San Diego Public Utilities (CA) and Pinellas County Utilities (FL).

Catherine is active in the water and wastewater utility industry, having presented at several conferences and co-authored two recent articles on long-term rate increases in *Journal AWWA*. Catherine also co-authored a chapter entitled “Public Outreach and Gaining Stakeholder Commitment” for the Fourth Edition of the industry guidebook, *Water and Wastewater Finance and Pricing: The Changing Landscape*. Prior to working at Raftelis, Catherine was a senior fellow at the Institute for Sustainable Development.

## Specialties

- Strategic planning
- Facilitation
- Organizational assessment
- Staffing analysis
- Strategy monitoring and implementation
- Risk and resiliency assessment
- Business process improvement
- Comparative industry analyses

## Professional History

- Raftelis: Senior Manager (2022-present); Manager (2019-2021); Senior Consultant (2016-2018); Consultant (2013-2015); Associate Consultant (2011-2012)
- Mecklenburg County Waste Management Advisory Board (appointed term: 2019-2021)
- The Institute for Sustainable Development (2009-2011)

## Education

- Master of Public Administration - University of North Carolina Charlotte (2017)
- Master of Environmental Management - Duke University (2011)
- Bachelor of Science in Business/Economics, Biology, Environmental Studies - Randolph-Macon College (2009)

## Certifications

- Change Management & Leadership Certification - Cornell University (2019)
- American Water Works Association Risk & Resiliency Certification (2019)

## Professional Memberships

- AWWA
- ELGL
- Solid Waste Association of North America

# Julie Gieseke

VISUAL FACILITATOR  
**Visual Facilitator**

## ROLE

Julie Gieseke is a visual facilitator, working in the realm of group facilitation, strategic planning and strategic communications for over fifteen years. She will work at the direction of Catherine to create visuals that bring ideas and people together through image and story.

## PROFILE

Julie collaborates on projects utilizing the tools of group process and design, such as visual facilitation, creative engagement, and storytelling, to bring strategy and tactics into clear focus. She also incorporates change methodologies such as Appreciative Inquiry, Positive Psychology, StrengthsFinder, and Neurolinguistics.

Julie’s unique skill set combines facilitation, active listening, and visual facilitation to bring sense-making, consensus, energy, and vibrancy to each engagement. As a consultant with The Novak Consulting Group and now Raftelis, Julie has worked on a variety of strategic planning and facilitation projects.

Julie developed her group process design through a broad range of experience. She received her master’s degree in Organizational Development and Management from Fielding Graduate University, is certified as a professional coach through The Coaches Training Institute and is a certified Master Practitioner of Neurolinguistics. Julie also received professional training through The Grove Consultants International and has been mentored by leaders in the fields of visual facilitation, facilitation, organizational development, coaching, storytelling, and performance. The result is a wide range of exposure to various approaches that culminates in a unique style that is customizable for each engagement.



## Specialties

- Visual Facilitation
- Strategic Visioning/Planning
- Executive Coaching
- Facilitation
- Team Development

## Professional History

- Raftelis: Visual Facilitator (2020-present); Visual Facilitator, The Novak Consulting Group (2011-2020)
- Map the Mind: Principal (2008-present) Visual Facilitation, Coaching, Consulting, Teaching

## Education

- Master of Arts in Organizational Development and Management - Fielding Graduate University (2008)
- Professional Coaching Certification - Coaches Training Institute (2008)
- Bachelor of Arts in Film and Video Production/Theater Arts - University of California, Santa Cruz (1988)

## Certifications

- Master Practitioner of Neurolinguistics
- Certified Professional Co-Active Coach

## Professional Memberships

- International Forum of Visual Practitioners

# Athena Hall

STAFF CONSULTANT  
**Consultant**

## ROLE

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

## PROFILE

Athena joined Raftelis in 2022 after beginning her consulting career in 2020, following eight years of direct service to local government organizations and hospitals in the Midwest.

Prior to consulting, Athena worked for the Strategic Planning Division in the Detroit Public Schools Community District. She worked on program evaluation and the district-wide strategic plan. She completed data analysis for community-facing programs, drafted workflow improvements for district departments, and led stakeholder engagement efforts designed to inform the district’s research agenda. Athena also led a technology distribution program with the district, which was awarded the Michigan Association for Computer Users in Learning (MACUL) Award in 2021.

Athena is well-versed in program evaluation and analyzing areas of improvement. During her time with Tabernacle Community Development Corporation in Lima, Ohio, she collaborated with schools, churches, and local organizations on priority issues within high-risk youth communities. Athena built on this experience in her roles with St. John Medical Center and the City of Detroit, Michigan where she developed referral/resource pathways for clients, led evaluation teams to develop quality improvement strategies, coordinated resources for housing insecure families utilizing the Coordinated Assessment Model (CAM), and provided direction for community health workers and staff in client service and resource navigation.

As a student at the George Washington University, Athena served as chapter president of AcademyHealth, where she led public health initiatives impacting homelessness in Washington, D.C. She was also a policy intern with the Health Resources and Services Administration (HRSA), where she analyzed state HIV policies across the United States.

Athena earned a bachelor’s degree in biology from Wilberforce University and a master’s degree in public health from the George Washington University School of Public Health. She is currently completing her doctorate degree in public health at Walden University, and is a former speaker/presenter at the National Association of County and City Officials Conference.



## Specialties

- Strategic Planning
- Stakeholder Engagement
- Data Analysis
- Program Evaluation

## Professional History

- Raftelis: Consultant (2022-present)
- Detroit Public Schools Community District: Program Supervisor – Strategic Planning (2020-2021)
- Altarum: Program Manager (2018-2019)
- Wayne State University: Faculty (2018)
- City of Detroit: Program Manager (2017-2018)
- St. John Medical Center: Project Manager – Mother Nurture (2016-2017)
- St. John Medical Center: Project Manager (2012-2015)
- Health Resources and Services Administration: Summer Intern (2012)
- Commonhealth Action: Intern (2011-2012)
- Union of Concerned Scientists: Young Sciences Intern (2011)
- Wilberforce University: Admissions Assistant (2006-2010)

## Education

- PhD in Public Health – Walden University (To be completed: June 2022, ABD)
- Master of Public Health – George Washington University (2012)
- Bachelor of Science in Biology – Wilberforce University (2010)

## Professional Memberships

- American Public Health Association
- National Society of Leadership and Success
- US Fulbright Program

## CONFLICTS OF INTEREST

We are unaware of any potential conflicts of interest with the Township or conflicts that might arise from our work there.

## LEGAL INVESTIGATIONS

No employee of Raftelis has been, or is currently, the subject of a Federal or State investigation or investigation by any other law enforcement agency.

## LITIGATION

Raftelis has been joined as a third-party defendant in a lawsuit filed by local developers against the Town of Fuquay-Varina, North Carolina. The subject of this currently pending litigation is development impact fees assessed by the town and developed by Raftelis. This is the only legal case in which Raftelis has been joined as a party in the history of our firm. Raftelis intends to vigorously defend the allegations and claim.

## INSURANCE COVERAGE

A copy of our Certificate of Insurance, including coverages, is provided on the next page.

Client#: 1722483

RAFTEFIN



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
1/27/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer any rights to the certificate holder in lieu of such endorsement(s).

PRODUCER <b>Cameron M Harris &amp; Co, LLC</b> Div USI Ins 6100 Fairview Road Ste 1400 Charlotte, NC 28210	CONTACT NAME: <b>Andrew Little</b>
	PHONE (A/C, No, Ext): <b>980-495-0832</b> FAX (A/C, No): E-MAIL ADDRESS: <b>andrew.little@usi.com</b>
INSURED <b>Raftelis Financial Consultants, Inc.</b> 227 West Trade Street, Ste. 1400 Charlotte, NC 28202	INSURER(S) AFFORDING COVERAGE      NAIC #
	INSURER A : <b>National Fire Insurance Co. of Hartford</b> <b>20478</b>
	INSURER B : <b>Continental Insurance Company</b> <b>35289</b>
	INSURER C : <b>American Casualty Company of Reading PA</b> <b>20427</b>
	INSURER D : <b>Continental Casualty Company</b> <b>20443</b>
	INSURER E : INSURER F :

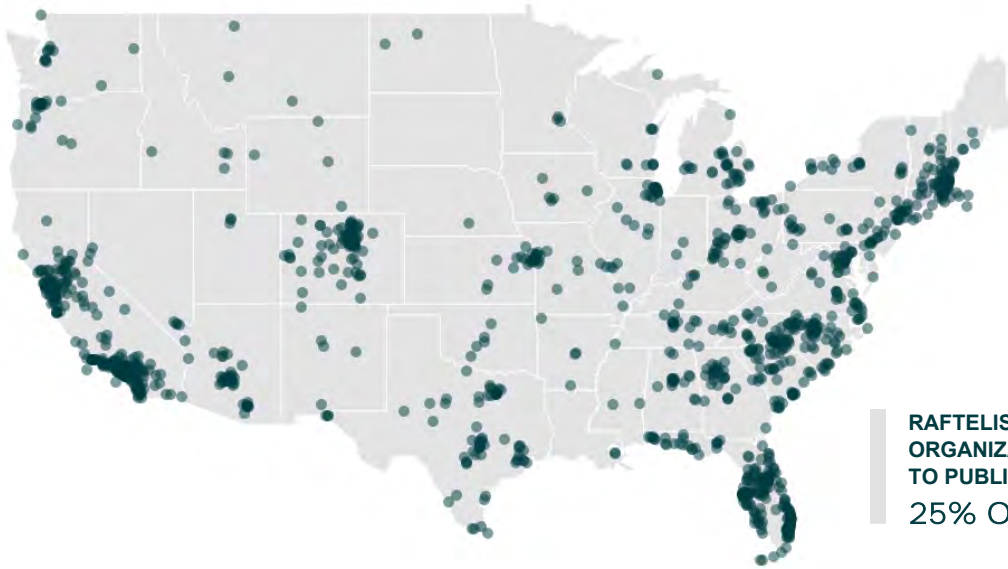
COVERAGES      CERTIFICATE NUMBER:      REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDSUBP INSR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC OTHER:		6076000011	01/21/2022	01/21/2023	EACH OCCURRENCE \$1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$500,000 MED EXP (Any one person) \$15,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COMP/OP AGG \$2,000,000 \$
D	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS ONLY		BUA6076000025	01/21/2022	01/21/2023	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
B	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED. <input checked="" type="checkbox"/> RETENTION \$10000		CUE6076000039	01/21/2022	01/21/2023	EACH OCCURRENCE \$5,000,000 AGGREGATE \$5,000,000 \$
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N / A	WC676305637 WC676000042-CA	01/21/2022 01/21/2022	01/21/2023 01/21/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE - EA EMPLOYEE \$1,000,000 E.L. DISEASE - POLICY LIMIT \$1,000,000
D	Professional		652071235	01/21/2022	01/21/2023	\$5,000,000 Aggregate \$5,000,000 Occurrence

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

<b>CERTIFICATE HOLDER</b> Raftelis Financial Consultants, Inc. 227 W. Trade Street Suite 1400 Charlotte, NC 28202-0000	<b>CANCELLATION</b> SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE <i>Paula B Bulman</i>
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RAFTELIS HAS PROVIDED FINANCIAL/  
ORGANIZATIONAL/TECHNOLOGY ASSISTANCE  
TO PUBLIC AGENCIES SERVING MORE THAN  
25% OF THE U.S. POPULATION.

# Experience

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

Our staff has assisted more than 1,200 utility and local government organizations across the U.S., including some of the largest and most complex agencies in the nation. In the past year alone, Raftelis worked on more than 1,200 strategic planning, financial, management, and/or technology consulting projects for over 600 local government agencies in 46 states, the District of Columbia, and Canada. Our team has extensive experience with strategic planning throughout the country. Our clients tell us we are more than just consultants—we are trusted advisors. We point to a strong repeat customer base as part of the evidence, as well as the many clients who have hired us numerous times to do vital work for their organizations. Other clients have told us that our contacts are “enthusiastic” when providing a reference to potential clients, and they point to actionable and practical solutions.

## City of Avondale [AZ](#)

**Reference:** Tracy Stevens, Deputy City Manager  
11465 West Civic Center Drive, Avondale, AZ 85323  
P: 623.333.1000 / E: [tstevens@avondaleaz.gov](mailto:tstevens@avondaleaz.gov)

The City of Avondale (City) is a keystone community in the Phoenix metropolitan area that has established itself as a manufacturing and healthcare hub, as well as a world-class sports and entertainment destination. Raftelis was engaged in 2020 to facilitate an update of the City’s 2016 strategic plan and assist with the implementation of a monitoring and reporting tool to demonstrate progress against the new plan. The 2021 Avondale Strategic Plan was designed with guidance from the Avondale City Council and crafted with input from engaged residents, local businesses, and key personnel across the City’s organization. The plan represents a cohesive and intelligent approach to continuing on the path to success for Avondale: to create a family-friendly and economically robust city that is *Aspiring, Achieving, and Accelerating*, by an organization whose core purpose is all about *Making Lives Better*.

## Borough of State College PA

**Reference:** Thomas J. Fontaine II, Borough Manager  
 Allen Street, State College, PA 16801  
 P: 814.234.7110 / E: tfontaine@statecollegepa.us

Borough of State College (Borough) engaged TNCG, now Raftelis, in 2018 to update its Strategic Plan. The Borough is the home of Pennsylvania State University, and it had been ten years since the Borough had engaged in strategic planning. They were interested in community, institutional, and organizational engagement. Community meetings were held at two different periods to gather information on what people were hoping the Borough would be like in the future and to respond to the initial framework developed by the Mayor and Borough Council. The Borough adopted the final plan in February 2019.

## City of Laredo TX

**Reference:** Robert Eads, ICMA-CM, City Manager  
 1110 Houston Street, Laredo, TX 78040  
 P: 956.791.7302 / E: reads@ci.laredo.tx.us

The City of Laredo (City) engaged with Raftelis to plan and facilitate a Governance and Strategic Planning Retreat in 2021. Topics included an exploration of good governance, roles, emerging trends, defining success for identified strategic outcomes, and the identification of Council priorities. Facilitation included large and small group activities to maximize participation and dialogue.

## City of Gaithersburg MD

**Reference:** Tanisha Briley, City Manager  
 31 South Summit Avenue, Gaithersburg, MD 20877  
 P: 301.258.6300 / E: tanisha.briley@gaitthersburgmd.gov

In 2021, the City of Gaithersburg (City) engaged Raftelis to prepare a strategic plan for the City. The work includes staff engagement, a workshop to develop the strategic planning framework, significant community engagement, and staff implementation teams to develop specific strategies for all goal areas.

## Central Arizona Project AZ

**Reference:** Bridget Schwartz-Manock, Director, Public Affairs  
 23636 N. Seventh Street, Phoenix, AZ 85024  
 P: 623.869.2150 / E: bschwartzmanock@cap-az.com

Central Arizona Project (CAP) is a 336-mile system that brings Colorado River water to central and southern Arizona, delivers Arizona's single largest renewable water supply, and serves 80% of the state's population with a secure, stable, and renewable water supply. CAP engaged TNCG, now Raftelis, to lead its Board through a strategic planning process. This included significant outreach to CAP stakeholders, surveys of CAP employees, and facilitated retreats with the Board and Management Council of the organization.

## Town of Nantucket MA

**Reference:** Libby Gibson, Town Manager  
 16 Broad Street, Nantucket, MA 02554  
 P: 508.228.7200 ext. 7305 / E: LGibson@nantucket-ma.gov

Our team has worked with the Town of Nantucket (Town) since 2018 to ensure the efficient and effective delivery of Town Services and to work with the Select Board in providing a Strategic Plan for the Town. A 2018 Town-wide organizational assessment served as a platform for our implementation work and ongoing work with the Town Manager, Staff, and Select Board. We have provided organizational assessments of multiple Town departments and are currently providing a succession plan to assist with recruitment and retention, a particular challenge in an island community.

## Town of Westborough MA

**Reference:** Kristi Williams, Town Manager  
 34 West Main Street, Westborough, MA 01581  
 P: 508.366.3032 / E: kwilliams@town.westborough.ma.us

The Town of Westborough (Town) contracted with TNCG, now Raftelis, to facilitate a comprehensive strategic planning process for the Town. The process included extensive public outreach, focus groups, and online resident engagement which resulted in a comprehensive vision for the Westborough community and an articulation of the Town’s role in achieving that vision. A graphic representation of the vision and critical success factors is below.



## City of Lawrence KS

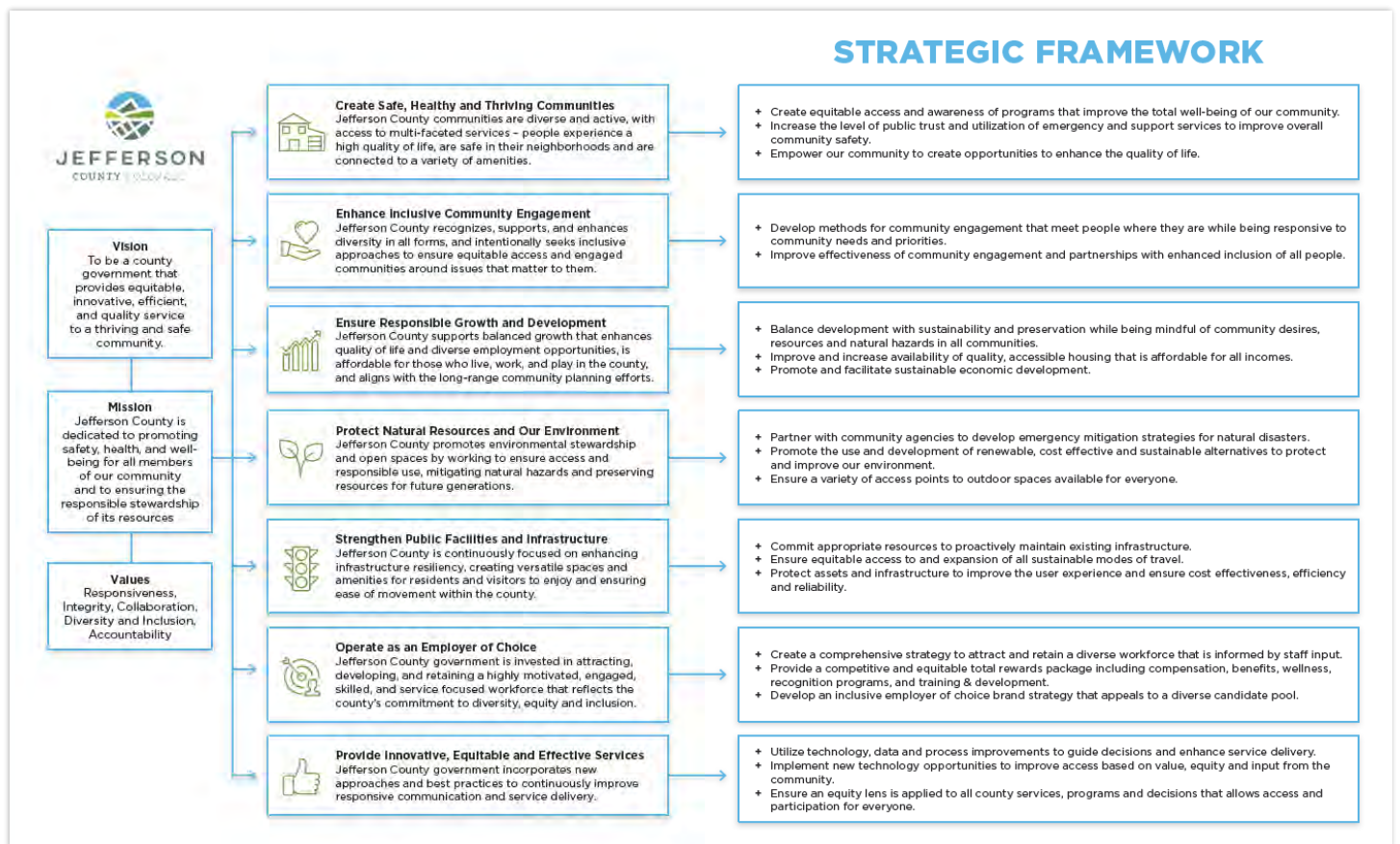
**Reference:** Dianne Stoddard, Assistant City Manager  
 6 East 6th Street, Lawrence, KS 66044  
 P: 785.832.3400 / E: dstoddard@lawrenceks.org

TNCG, now Raftelis, worked with the City of Lawrence (City) to establish its first Strategic Plan. Subsequently, the City turned to us again to expand the level of community engagement and work with the new City Manager and City Council. The 2020 Strategic Plan included training City Staff to conduct extensive community outreach. “Lawrence Listens” was established to partner with our consultants in conducting outreach that informed the Strategic Plan.

# Jefferson County CO

**Reference:** Stephanie Corbo, Chief Financial Officer  
 100 Jefferson County Parkway, Golden, CO 80419  
 P: 303.271.8542 / E: scorbo@jeffco.us

Raftelis was engaged in 2021 to facilitate an update of Jefferson County’s (County) existing strategic plan and assist with implementation planning for priorities and strategies across the organization. The new strategic plan was designed with guidance from the Jefferson County Board of County Commissioners and crafted with input from engaged residents, local businesses, and key personnel from across the County’s organization. The plan represents a cohesive and thoughtful approach to continuing to achieve Jefferson County’s vision: to be a county government that provides equitable, innovative, efficient, and quality service to a thriving and safe community. Organizational priorities are to: create safe, healthy, and thriving communities; enhance inclusive community engagement; ensure responsible growth and development; protect natural resources and our environment; strengthen public facilities and infrastructure; operate as an employer of choice; and provide innovative, equitable and effective services.



# Executive Summary

Raftelis is passionate about strategic planning. Helping communities to identify local needs, now and into the future, develop a path to get there, and implement a system to measure progress is the exact work we do. As noted in this proposal, we provide an array of consulting services to local governments nationwide and internationally, including strategic planning. While Raftelis has helped hundreds of jurisdictions with strategic planning, we do not provide cookie-cutter solutions and ensure the resulting plan recognizes the specific local context and constraints of our clients.

The approach developed for Abington Township will result in a strategic plan that combines data and information with thoughtful engagement from policymakers, staff, and the community. To begin, we will meet with the Township Manager and Administration to discuss the work and finalize the approach and timeline. We will interview all Township Board members to gain their perspectives on Township priorities. We will survey all Township employees to gather their thoughts on organization mission and values. We will hold public visioning sessions to gain input from residents and board and commission members.

Our team will work with the Township to review interview and survey themes. We will plan and facilitate four public meetings, two in-person and two remote, with Township residents and stakeholders to gather input on local needs and the strategic plan framework. Our facilitation style is creative and engaging, using a variety of classic and more novel techniques, including a visual facilitator who will graphically capture our conversations before participants even leave the room or log off the computer. We will summarize the information gathered and plan and facilitate a Strategic Planning Workshop with Township Board Members and staff to finalize the strategic planning framework based upon everything learned.

Next, we will work with staff on implementation. The success of a strategic plans rests upon thoughtful and planned implementation. We will assemble teams of Township staff assembled to address each strategic goal in the plan and meet with them to plan methods for regular Board updates as well as integration of the strategic plan into operations.

At project conclusion, Raftelis will provide the Township with a summary and documentation of the entire process. We will review with the Township, receive feedback, and finalize the documents. We will provide not only the full document but a summary that utilizes graphics to briefly capture the Township’s new strategic plan, for use in internal and external communications.



Our combination of skilled and knowledgeable strategic planning consultants, who themselves have worked in local government, with tested facilitation and engagement techniques has proven successful for clients nationwide. We hope to add Abington Township to our list of satisfied clients.

# Project Approach

AT ITS BEST, STRATEGIC PLANNING ENGAGES INDIVIDUALS AND STRENGTHENS A SENSE OF COMMUNITY THAT UNDERGIRDS STRONG CIVIC ENGAGEMENT. TAPPING INDIVIDUALS WHO ARE CONTENT, AND EVEN PERHAPS APATHETIC, CREATES NEW LEADERS FOR THE FUTURE AND ENERGIZES PEOPLE IN A POSITIVE WAY TOWARD THEIR LOCAL GOVERNMENT. WE BELIEVE THAT COMMUNITIES FUNCTION BEST WHEN THERE IS ENGAGEMENT DURING *GOOD* TIMES, NOT JUST WHEN PEOPLE OPPOSE SOMETHING.

In the strategic planning process, we understand the unique roles of each stakeholder. Each participant in this process comes with a different perspective and, perhaps, conflicting priorities. Each of these viewpoints is important and valuable. It is our responsibility to work in partnership with the Township to synthesize this information and facilitate a process that does the following:

- Honors and respects the diversity of opinions of participants
- Promotes group communication and collaboration through inclusivity and community building
- Provides useful information and direction for decision making and priority setting

Effective and efficient project management will be critical for ensuring the successful completion of this engagement. Therefore, our approach is to work collaboratively with the Township to ensure all expectations are articulated from the start. We remain in close contact with our clients throughout all phases of each engagement to ensure these expectations are met. This also allows us to quickly address any contingencies that may arise. Our experience with similar work enables us to hit the ground running.

A strategic planning process involves several steps:

- Articulating a clear vision for the community and mission for the organization
- Preparing an environmental scan that identifies the factors affecting the community and organization
- Establishing goals
- Identifying priority strategies
- Creating implementation plans that become the focus of activity and engagement long after the process itself has finished

The process of developing a strategic plan explores three specific questions:

- What do we know to be true? – *Who are we?*
- What do we hope will be true in the future? – *Where are we going?*
- What must go well in order to make it so? – *How are we going to achieve it?*

In this way, a strategic plan is a roadmap to move a community toward its intended vision. The approach outlined below will assist Abington Township with this process.

## Activity 1: Understand the Context

A successful process will benefit from a collaborative relationship between the consulting team and Township from the very beginning of the process. This task is intended to begin building that relationship.

At the start of this engagement, we will request and review background information, including all other planning documents such as the Township’s comprehensive plan, housing data, economic information, internal goals or objectives, resource materials, demographics, and other relevant data.

Our team will next meet with the Township Manager to discuss the project, review schedule, and discuss communication and engagement strategies for the project. We want to ensure that we have a shared understanding of how to develop the Township’s strategic plan. We will review the project plan and finalize the timelines and schedule. Next, our project team will meet with the Township Administration as a group to discuss the use and integration of prior strategic plan in operations, and to learn about any emerging organizational and community priorities or initiatives.

Raftelis will individually and confidentially interview each of the Township Board members to gain their input on the process and on the Townships strengths, weaknesses, opportunities, and threats, with a discussion on upcoming initiatives.

In collaboration with Township Administration, our team will develop and administer a survey to all Township employees to gain staff input on Township “SWOT” – strengths, weaknesses, opportunities, and threats – as well as to gain input on potential Mission and Values statements to inform the strategic plan. Survey results will be analyzed and summarized.

We will incorporate all information received into the development of an Environmental Scan, which will include the “sense of stakeholders.” The Environmental Scan will provide helpful background information about the Township’s current state and potential future impacts. To finalize the Environmental Scan, we will gather existing data about the community, such as financial trends, demographic data, statistics about housing, business, and jobs, and other relevant information. All information received will be incorporated into the Scan.

Throughout the project, our team will provide regular status updates to the Township and both formal and informal opportunities to discuss the process and make necessary adjustments.

### DELIVERABLES:

- Kick-off meeting agenda
- Draft and final project timeline
- Draft and final staff survey and analyzed results

## Activity 2: Facilitate Visioning Sessions

Based upon everything learned, Raftelis will work with Township Administration to develop preliminary Mission and Values statements using input from the staff survey.

The strategic plan is best when touched by as many people as possible. In order to engage the community as part of this process, Raftelis will facilitate four public Visioning Sessions – two in-person and two remote -- with residents and stakeholders. During the Sessions, we will discuss with participants their perceptions of Township operations and their hopes for its future. This information will provide valuable community input as we build the strategic planning framework. Raftelis will summarize everything learned from the Visioning Sessions for review with the Township.

Some stakeholders have no interest or time for participating in face-to-face meetings or focus groups. As a result, we have developed electronic tools to capture their input and provide other means of engaging in the discussion about a community's future while reducing barriers to participation such as childcare and transportation. We have found that a mix of both in-person and virtual meetings allows for greater participation by those individuals in the community who might not typically participate. The online option is approachable and allows community members to engage to the extent they are comfortable and when it is convenient for them.

Based on information from prior activities and conversations, we will begin planning for a Strategic Planning Workshop. We will provide Township Administration with a draft agenda, participant materials, methodology, and room setup needs. We will facilitate the Workshop with Township Board Members, Township Administration and other key staff to articulate a desired future for the community. The Environmental Scan will be reviewed to provide context for the vision and goals. Our team will facilitate the development of a long-term vision for the Township and critical factors in its successful achievement. The organizational mission and values will also be reviewed and affirmed.

The session will include activities with the entire group as well as small group breakout sessions that will allow everyone to actively participate and engage in the process. During the session, the primary role of the facilitator is to ensure that the environment is respectful and conducive to open and constructive dialogue so that the established objectives are ultimately met. While the agenda provides the structure to accomplish the tasks, we also know how important it is to pay attention to the group and make sure that conversations that need to happen actually happen, so we are flexible and in tune with the group during the process.

We will prepare a summary report which outlines our process steps, as well as the strategic plan, goals, mission, and values, and we will begin to assist the Township with implementation.

### DELIVERABLES:

- Summary of public meeting input
- Summary report of process and strategic plan framework

## Activity 3: Develop Implementation Approach

Achievement of the strategic plan will rest upon the Township's successful implementation. Raftelis will prepare and provide a customized implementation template for the Township.

Our team will work with designated Township staff members to develop implementation plans for each goal area and to identify specific strategies and performance metrics that the Township can use. The implementation template will include steps to achieve outcomes, resources required, and the responsible party assigned to each outcome. We will work collaboratively to develop metrics/performance indicators for each outcome area in the strategic plan. This will allow the organization, the Board and the community to track progress.

Raftelis will develop a plan and guidelines for use by the Township in updating the Township Board on a consistent basis with regard to implementation and progress toward strategic goals.

Finally, we will work with Township staff to identify appropriate methods for integrating key organizational processes into the overall strategic plan framework.

### **DELIVERABLES**

- Draft and final implementation template
- Completed templates for each goal area, including strategies and metrics

## Activity 4: Prepare Final Deliverables

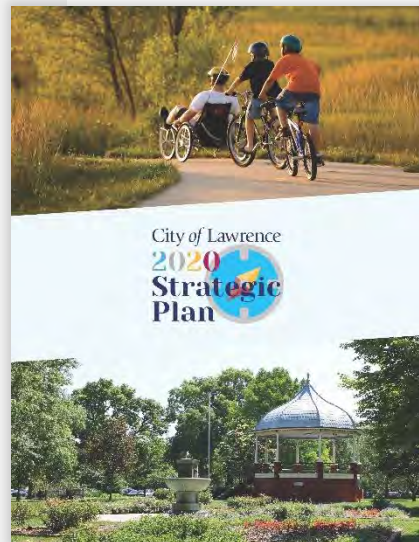
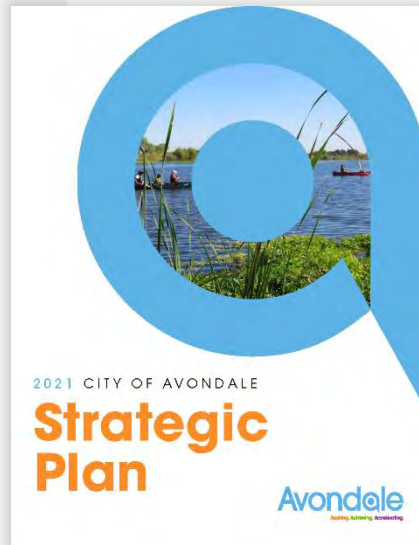
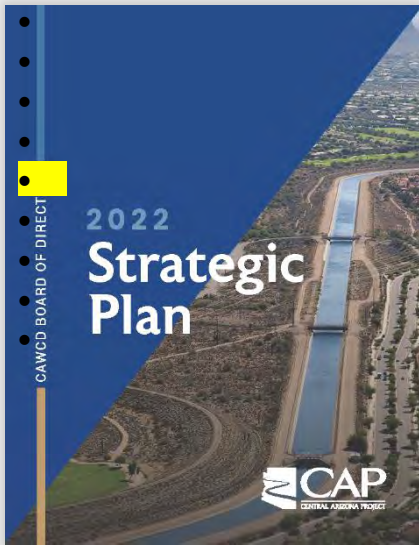
In this activity, our project team will prepare a comprehensive and attractive deliverable that encapsulates the Township's strategic planning process. This will include a summary of the entire strategic planning process and methodology, as well as the resultant strategic planning framework including mission, vision, values, goals, and strategies/outcomes.

In addition to the full report, we will also provide a summary document to communicate publicly on the Township's website or in print. In this way, the Township can share its strategic plan goals and outcomes with the Abington Township community in a clear and concise way, utilizing engaging graphics to encapsulate the plan for a variety of audiences.

We will review the draft deliverables with the Township and make any necessary changes or modifications before finalization.

### **DELIVERABLES:**

- Draft and final strategic plan report
- Summary document



The strategic plan that we will develop for the Township won't be just another report to sit on your shelf. Our team of strategic planning experts and graphic designers develop plans that serve as tools to graphically communicate the organization's vision to both internal and external stakeholders.

**Shown here are the front covers of several strategic plans that Raftelis has recently developed and designed.**

# Capability

## MANAGING PROJECT SCHEDULE/ PROVIDING EFFICIENT SERVICES

Raftelis employs several management strategies to heighten the effectiveness and efficiency of the services we provide to our clients. We place a high priority on being responsive to our clients and, as we determine scope and staffing for each project, we carefully consider our workload and the availability of resources to meet client needs and project schedules.

Each week, the Raftelis management team participates in a conference call to review the number of consulting hours required to meet the needs of our clients during the upcoming week. This weekly meeting allows our project managers to deploy our consulting staff in a flexible manner that ensures a suitable level of hours will be devoted to the Township even during periods of accelerated deadlines and heavy work requirements.

Our project management conference calls provide Raftelis project managers with opportunities to effectively distribute work within a project. However, it is equally important that consulting hours spent on the project are tracked and compared to project budgets on a real-time basis. Raftelis uses project management software to monitor project progress, consulting hours, and budgets.

If selected for this project, we will conduct a comprehensive scoping meeting with the Township staff and our project team to discuss the work plan to ensure we are in agreement on how best to achieve the Township's goals and objectives. This meeting will include a discussion of our proposed schedule and the Township's timing requirements for meetings, milestones, and deliverables, so that our teams have a full understanding of what to expect on the project. Throughout the project, we will provide the Township with frequent updates so that you are constantly aware of the status of the project and our progress towards meeting milestones and deadlines.

# Project Management

## APPROACH TO PROJECT MANAGEMENT

Throughout the project, Raftelis will conduct ongoing project management and administration. The Project Director and Project Manager will plan, coordinate, monitor, and control all project tasks in concert with all other appropriate project team members. By keeping all activities coordinated, the team can adhere to the agreed upon project schedule.

Raftelis includes regular and consistent project team and communications with the Township, consisting of a combination of email and phone correspondence as well as virtual meetings. The most important aspect of communications is the approvals process and having a clear understanding of the Township's approval protocols. This ensures the Township is involved with the project progress needs and prevents surprises in deliverables and invoicing.

Raftelis has internal safeguards to track and project forward all personnel hours and expenses incurred on each task. For this project, the Project Director and Project Manager will track such expenditures. Analyzing weekly costs helps prevent cost overruns and provides the Township with the option to shift allocated funding from one task to another if the need should arise. Raftelis believes that the Township should be made aware of any "assignment creep" where approved tasks

are expanded beyond what was initially contracted. In our monthly invoicing of services to the Township, we typically indicate the dollar value of project work completed so our clients can see where the work stands in any given month. As necessary, the regular reporting will provide an indication of how the project schedule is proceeding and whether there are issues that need to be addressed relative to analysis, approach, assumptions, schedule, and/or administration.

For quality assurance purposes, the Project Manager will issue guidance to each Raftelis project team member prior to the commencement of work to convey expectations, sources to use for problem solving, and the budget and schedule. The Project Director will provide guidance on project strategy, direction, and written deliverables to assist in minimizing the cost and time needed for editing and production prior to submittal to the Township. For quality control, prior to submitting draft work products, each item is internally reviewed by the Project Director and Project Manager and revised to ensure consistency of professional quality and performance prior to submission to the Township.

## QUALITY ASSURANCE/QUALITY CONTROL PROGRAM

Credibility is crucial for building consensus and support for implementing the recommendations of a study. The fastest way for the Township to lose credibility with your stakeholders is to provide information that is incomplete or incorrect. The Township must have total confidence that the information provided by the consultant is as accurate as possible.

Raftelis has developed a Quality Assurance (QA) process that consistently results in accurate deliverables of the highest quality. Each QA plan is tailored to the specific project, but there are a number of common elements such as senior-level participation, outside perspective, and involvement from project initiation. The QA plan that we will implement as part of this project embodies these elements. We have found that a well-defined QA plan ensures that our work products will be of the highest quality and meet or exceed the standards that our clients have come to expect from Raftelis.

As the Project Director, Julia Novak will be utilized to provide additional perspectives from other similar projects nationally and in the region. Julia will add an outside perspective to the project team that will introduce fresh thinking and deepen insights. Raftelis' project delivery plan always includes layered, independent reviews of key deliverables to ensure accuracy and completeness are achieved and input is gathered from senior experts. We have included time in the project approach and schedule to allow for the necessary QA reviews.

## COMMUNICATION

The success or failure of any consulting engagement is defined by the effectiveness of communications between the client and consultant and among the project team members. A cornerstone of Raftelis' success is our commitment to regular, fully transparent, and highly effective communications with each client, as well as within our project teams.

Raftelis has used many different approaches in past consulting engagements to ensure the timely flow of information and documents between the firm, the client, and other relevant parties. These approaches will be defined by the Township to meet your unique needs and preferred communications protocols. On other projects, these protocols have included weekly, bi-weekly, or monthly meetings, telephone calls, and/or email communications between Raftelis' Project Manager and our designated client contact. They have also included detailed monthly written reports describing the status of the project. We encourage all of our clients to contact us day or night if they require any type of assistance.

# Client List

Raftelis has at any given time hundreds of active contracts underway across multiple divisions. Below we have provided contact information for three of our current strategic planning clients.

## City of Sheridan WY

**Reference:** Stuart McRae, City Administrator  
55 Grinnell Plaza, Sheridan, WY 82801  
P: 307.675.4202 / E: smcrae@sheridanwy.gov

## Town of Nantucket MA

**Reference:** Libby Gibson, Town Manager  
16 Broad Street, Nantucket, MA 02554  
P: 508.228.7200 ext. 7305 / E: lgibson@nantucket-ma.gov

## City of Gaithersburg MD

**Reference:** Tanisha Briley, City Manager  
31 South Summit Avenue, Gaithersburg, MD 20877  
P: 301.258.6300 / E: tanisha.briley@gaitthersburgmd.gov

## CONFLICTS OF INTEREST

Raftelis has no existing or potential conflicts of interest.

Should a potential conflict of interest arise, Raftelis will discuss with the Township and determine how best to eliminate any conflict. In all cases, we would receive written approval from Abington Township before proceeding.

## National Experience

This matrix shows some of the communities throughout the U.S. that Raftelis/TNCG staff has assisted and the services performed for these clients.

Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation
AL Birmingham Water Works Board	●		●
AK Municipality of Anchorage	●		
AR Central Arkansas Water	●		●
AR El Dorado	●		
AR Little Rock Wastewater	●		
AZ Alliance for Innovation			●
AZ Avondale			●
AZ Bullhead	●		
AZ Central Arizona Project			●
AZ Clarkdale		●	
AZ Cottonwood		●	
AZ Goodyear			●
AZ Oro Valley		●	
AZ Payson		●	
AZ Peoria		●	
AZ Scottsdale		●	
AZ Sierra Vista			●
AZ Yuma		●	●
CA Central Contra Costa Sanitary District	●		
CA Delta Diablo Sanitation District	●		
CA Eastvale	●		
CA Fullerton	●		
CA Gilroy	●		
CA Hanford			●
CA Hayward			●
CA Hollister	●		
CA Huntington Beach	●		
CA Long Beach Transit Authority	●		
CA Manhattan Beach			●
CA Malibu	●		
CA Oceanside Water Utilities			●
CA Palo Alto			●
CA Placer County			●
CA Roseville			●
CA Sacramento Area Sewer District/Sacramento Regional County Sanitation District			●
CA San Gabriel	●		
CA San Luis Obispo			●
CA San Marino			●
CA Santa Barbara	●		●

Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation
CA Seaside			●
CA Yountville			●
CO Adams County			●
CO Aspen	●	●	●
CO Aurora	●		●
CO Boulder	●	●	●
CO Boulder County	●		
CO Brighton			●
CO Centennial	●		●
CO Denver Wastewater	●		
CO Elbert County	●		
CO Erie			●
CO Evans			●
CO Fort Collins	●	●	●
CO Golden			●
CO Greeley	●		
CO Jefferson County			●
CO La Plata County	●		
CO Lafayette		●	●
CO Louisville	●	●	●
CO Loveland		●	
CO Northglenn		●	
CO Metro Water Reclamation District			●
CO Routt County			●
CO Thornton			●
CO Timnath			●
CO Westminster			●
CO Windsor	●		●
CT Connecticut Town & City Management Association	●		
CT Enfield	●		
CT Greenwich		●	
CT Groton	●		
CT Manchester	●		●
CT Mansfield	●	●	
CT Meriden		●	
CT Windsor		●	
DC DC Water			●
DC District of Columbia Department of Public Works			●

Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation
DC International City/County Management Association	●		●
DC National League of Cities	●		
DC USAID - Moldova	●		
DE Kent County		●	
DE Lewes		●	
DE Milford		●	
DE Milton		●	
DE Rehoboth Beach		●	
DE Wilmington	●		●
DE Wilmington Utilities	●		●
FL Deerfield Beach			●
FL Palmetto Bay			●
FL Palmetto County	●		
FL Pinellas County	●		
FL Pompano Beach Utility Department	●		
FL Sanford			●
FL Tampa Water Department	●		●
FL Winter Haven	●		
GA Decatur			●
GA Roswell			●
IA Cedar Rapids	●	●	
IL Carbondale	●		
IL DuPage County	●		
IL Evanston	●		
IL Geneva			●
IL Gurnee			●
IL Lisle			●
IL Peoria County		●	
IL Schaumburg	●		
IL Warrenville	●		
IL Woodridge			●
IN Bloomington	●	●	
IN Indianapolis	●		
IN Monroe County	●		
IN Munster	●		●
KS Baldwin City		●	●
KS Bonner Springs	●		
KS Edgerton		●	
KS Edwardsville			●

Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation
KS Eudora			●
KS Garden City	●		
KS Gardner			●
KS Johnson County		●	●
KS Lawrence			●
KS Merriam		●	
KS Olathe			●
KS Roeland Park			●
KS Shawnee	●		●
KS Tonganoxie		●	●
KS United Government of Wyandotte County & Kansas City			●
KY Lexington-Fayette Urban County Government	●		
KY Louisville Water Company			●
KY Paducah			●
KY Sanitation District #! of Northern Kentucky			●
LA New Orleans	●		
LA Orleans Parish School Board		●	
MA Franklin County	●		
MA Lexington			●
MA Nantucket	●		●
MA Pioneer Valley Planning Commission	●		
MA Sherborn	●		
MA Westborough	●		●
MD Aberdeen	●	●	●
MD Baltimore Department of Public Works	●		●
MD Berwyn Heights		●	
MD Cambridge		●	
MD Charles County		●	
MD College Park	●		●
MD Gaithersburg		●	
MD Garrett Park		●	
MD Greenbelt			●
MD La Plata		●	●
MD Maryland Municipal League	●		
MD Maryland State Judiciary			●
MD Mount Rainier	●	●	
MD New Carrollton		●	
MD Ocean City			●
MD Ocean Pines Association	●		

Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation
MD Riverdale Park		●	
MD Rockville	●	●	●
MD Sykesville		●	
MD Takoma Park		●	
MD University Park			●
MD Westminster		●	●
MD Worcester County			●
MI Ada			●
MI Ann Arbor		●	●
MI Ann Arbor Transportation Authority			●
MI Canton Township	●		
MI Ferndale			●
MI Holland	●		
MI Jackson County			●
MI Midland			●
MI Midland Community Foundation			●
MI Novi		●	
MI Oakland County		●	
MI Rochester Hills	●	●	
MI Saline	●		
MI Three Rivers	●		
MN Cloquet	●		
MN Edina	●		
MN Minnesota Municipal League	●		
MN Northfield	●		
MO Chesterfield		●	
MO Clayton		●	●
MO Lee's Summit	●	●	●
MO Maryville			●
MO Metropolitan St. Louis Sewer District	●		
MO Missouri Municipal League			●
MO North Kansas City			●
MO Parkville			●
MO Platte City	●		
MO Sikeston			●
MO St. Joseph			●
MO St. Louis County			●
MO University City			●
MT Helena		●	

Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation
NC Albemarle			●
NC Asheville	●		
NC Brevard			●
NC Brunswick	●		
NC Cary			●
NC Charlotte Water			●
NC GoTriangle Transit	●		●
NC Greensboro	●		
NC Lowell			●
NC Onslow Water & Sewer Authority (ONWASA)			●
NC Orange County	●		
NC Raleigh	●		●
NC Raleigh Public Utilities Department	●		
NC Rolesville	●		
NC Swansboro			●
NC Wake County	●		
NC Wilmington	●		
NC Winston-Salem			●
NC Winston-Salem/Forsyth County Utilities			●
NE Hastings	●		
NE La Vista	●		
NE Reno	●		
NH Keene		●	
NJ Jersey Water Works	●		
NJ New Jersey Health Initiative	●		
NM Las Cruces		●	
NY Batavia		●	
NY Edgemont	●		
NY Ithaca	●		
NY Oneonta		●	
NY Rochester	●		
NY Wainscott	●		
OH Beavercreek Township	●		
OH Blendon Township			●
OH Blue Ash	●		●
OH Centerville		●	
OH Cincinnati	●		●
OH Clearcreek Township	●		●
OH Cleveland Heights	●	●	●

Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation
OH Dayton	●	●	
OH Delaware	●		
OH Delaware County			●
OH Delaware County EMS			●
OH Dublin	●	●	●
OH Gahanna	●		●
OH Georgetown			●
OH Granville		●	
OH Greater Cincinnati Water Works			●
OH Greene County	●		
OH Hilliard		●	●
OH Hudson		●	
OH Jackson Township		●	
OH Miami Township		●	
OH Miami University	●		
OH Miami Valley Risk Management Authority			●
OH Montgomery County Environmental Services	●		●
OH Monroe			●
OH Moraine		●	
OH National Association of State & Local Equity Funds			●
OH Newark	●		
OH Oberlin	●	●	●
OH Ohio City/County Management Association	●		●
OH Owens-Corning			●
OH Piqua			●
OH Portsmouth		●	
OH Powell			●
OH Prairie Township		●	
OH Preservation Parks of Delaware County			●
OH Sandusky		●	
OH Sharonville			●
OH Solid Waste Authority of Central Ohio (SWACO)	●	●	
OH Solon	●		
OH The Port, an Ohio Port Authority	●	●	●
OH Toledo			●
OH Troy	●		
OH Union County		●	
OH Upper Arlington		●	●
OH Washington Township	●	●	●

Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation
OH West Chester Township		●	
OH Westerville		●	
OH Worthington	●	●	●
OH Xenia	●		
OK Lawton	●		
OK Norman	●		
OR Beaverton		●	●
OR Bend			●
OR Gresham			●
OR Hillsboro		●	●
OR Hood River		●	
OR Lake Oswego		●	
OR Lane County		●	
OR Newberg		●	
OR Salem	●		●
OR Washington County	●	●	
OR Wilsonville	●		●
PA Allentown	●		
PA Association for Pennsylvania Municipal Management (APMM)			●
PA Bethel Park	●		
PA Breakneck Creek Regional Authority		●	
PA Capital Region Water			●
PA Carlisle Borough		●	
PA Duquesne	●		
PA East Buffalo	●		
PA East Whiteland Township	●		
PA Exeter Township	●		
PA Farrell	●	●	
PA Ford City Borough	●		
PA Harrisburg	●		
PA Hazleton	●		
PA Lancaster County	●		
PA Lehigh County Authority			●
PA Lewisburg	●		
PA Nanticoke	●		
PA Pittsburgh Water & Sewer Authority	●		●
PA Reading	●		
PA St. Marys	●		
PA State College			●

Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation
RI Westerly	●		
SC Charleston	●		
SC Hilton Head			●
SC Mount Pleasant Waterworks			●
SC Renewable Water Resources (ReWa)	●		
TN Farragut			●
TN Johnson City	●		
TN Metro Water Services of Nashville and Davidson County	●		●
TX Abilene		●	
TX Allen			●
TX Austin	●		
TX Brownsville Public utilities Board			●
TX Cedar Hill			●
TX Cedar Park	●		
TX Dallas			●
TX Lancaster		●	●
TX Laredo			●
TX League City			●
TX North Texas Municipal Water Department			●
TX Pearland	●		●
TX Plano			●
TX Prosper			●
TX Temple			●
TX The Woodlands	●		●
TX University Park		●	●
UT Murray			●
UT South Jordan			●
VT Burlington Water Resources	●		
VT Montpelier			●
VA Albemarle County		●	●
VA Alexandria		●	
VA Appomattox River Water Authority	●		
VA Arlington County		●	
VA Ashland		●	
VA Bedford County		●	
VA Charlottesville	●		
VA Fairfax		●	

Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation
VA Fairfax County		●	
VA Fairfax County Water Authority			●
VA Fredericksburg	●		
VA Gloucester County	●		
VA Hampton			●
VA Harrisonburg		●	
VA Leesburg		●	
VA Loudoun County	●	●	
VA Newport News		●	
VA Newport News Waterworks			●
VA Purcellville	●		
VA Rivanna Water & Sewer Authority			●
VA Suffolk	●		
VA Vienna			●
VA Virginia Retirement System		●	
VA Warrenton	●	●	
VA Washington County Service Authority			●
WA Bellevue	●		●
WA Camas	●	●	
WA Mercer Island			●
WA Richland			●
WA Sammamish		●	
WA Sequim	●		●
WA Shoreline	●	●	
WA Spokane Regional Health District		●	
WI Eau Claire			●
WI Central Brown County Water Authority		●	
WI Green Bay/Central Brown County	●		
WI Mequon		●	
WI Milwaukee Metropolitan Sewerage District			●
WI Oak Creek			●
WI Shorewood	●		
WI Washington County			●
WV Monongalia County			●
WV Morgantown		●	●
PR Puerto Rico Aqueduct & Sewer Authority (PRASA)	●		



# Cost Proposal

The total fixed fee to complete the scope of work outlined in this proposal is **\$78,000**, which includes all professional fees and expenses. No discounted rates are offered; all our clients are government and civic entities.

It is our practice to invoice clients monthly based on work completed.