

Town of Brookline

Climate Action and Resiliency Plan

COPY / TECHNICAL PROPOSAL / NOVEMBER 20, 2024





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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COVER LETTER



November 20, 2024

Alexandra Vecchio
Director of Sustainability and Natural Resources
Town of Brookline
333 Washington Street, Brookline, MA 02445

Subject: Proposal for Climate Action and Resiliency Plan

Dear Alexandra Vecchio:

Crafting a Climate Action and Resiliency Plan that prepares your organization for climate change impacts is critical for continuing to provide essential services to your community. Identifying, prioritizing, and mitigating the risks that your organization is vulnerable to can be both a complex and overwhelming task. That work is particularly important for local governments responsible for key infrastructure. Without adaptation strategies, climate change threatens to diminish infrastructure over time, risking your community's health and well-being.

We're here to support the Town of Brookline (Town) in mitigating and adapting to your specific climate impacts by designing an innovative and actionable plan that guides your organization into the future. Our team offers the following advantages:



Strategic Planning Expertise: A climate action plan is a strategic plan focused on preparing for our climate future, so your organization is well-positioned to adapt to changes quickly. Our team has extensive experience developing strategic plans for public agencies across the nation and in Massachusetts.



Direct Experience: We've been in your shoes, we understand the risks and challenges your organization faces, and we're prepared to help navigate them. Our experience also focuses us on clear implementation tactics to guide your organization into the future and ensure your plan does not just sit on a shelf.



Specialized Knowledge: Our project team brings a diverse array of skills to the table for this project, including local government operations, asset management, and communications and engagement. We will use these skills to develop a comprehensive and impactful action plan.

We are excited for the opportunity to bring our experience to bear for you, and I am happy to talk through anything you see here for further clarification. We acknowledge the receipt of Addendum 1.

Sincerely,

A blue ink handwritten signature of Rocky Craley.

Rocky Craley (Authorized Agent to Represent the Firm)

Vice President / Climate Action and Resilience Executive Lead

P: 704.771.3998 / E: rcraley@raftelis.com

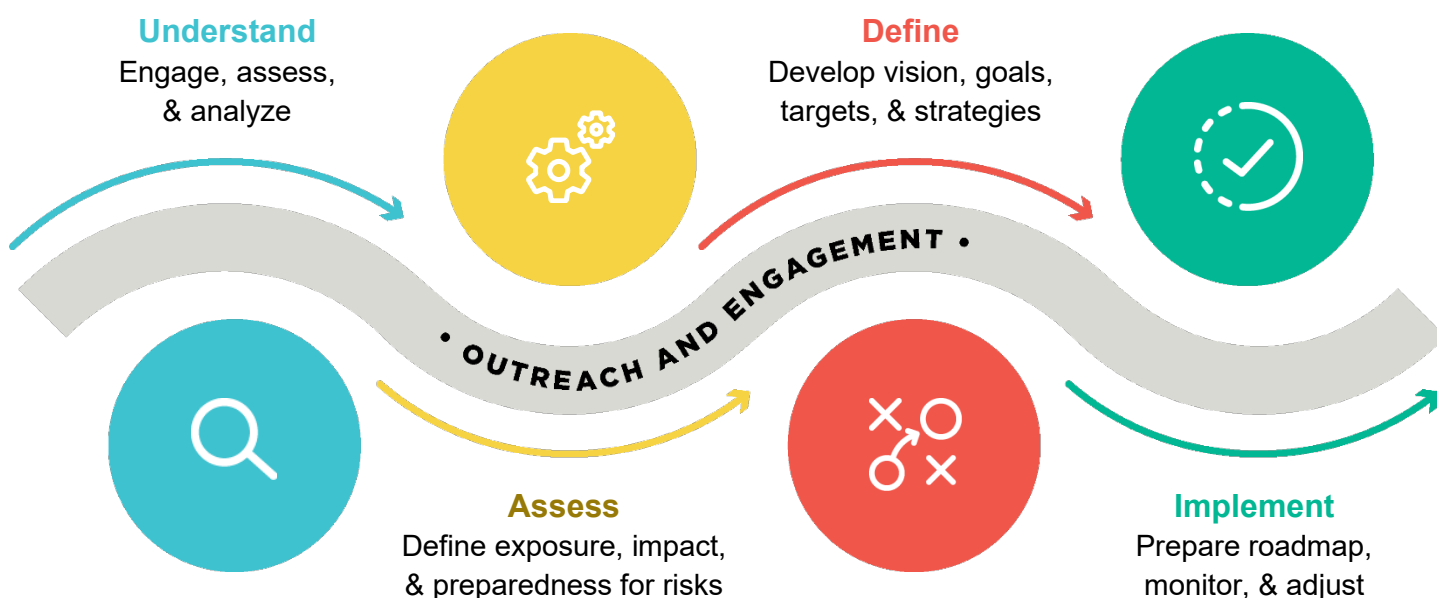
PROJECT GOALS, PROJECT PHILOSOPHY, AND APPROACH

Project Goals, Project Philosophy, and Approach

The impacts of climate change represent some of the most important challenges facing local government organizations today. At its best, climate action planning empowers municipalities to build resilient communities and create a vibrant, sustainable, and equitable future. Working collaboratively with Town staff and community partners we will help the Town of Brookline build on its existing climate action work and guide measurable future action that is focused on both mitigation and resilience.

We understand the Town of Brookline seeks assistance in developing an implementable and metrics-based Climate Action and Resiliency Plan. This includes identifying innovative solutions to both adapt and mitigate climate change impacts and the appropriate targets and financial impacts of implementation. Climate action planning is a strategic planning process that organizations use to prepare for and adapt to the changing climate. This process is visionary and specific, guiding organizational policy and detailing the strategies necessary to mitigate climate impacts.

We use a four-phase approach that assesses your organization's internal and external operating environments, examines its vulnerability to climate change, defines goals and strategies that comprise the climate action plan, and outlines the steps for implementation and performance measurement. A climate action plan is an opportunity to engage with your community throughout the process to ensure your plans align with community expectations. Recognizing this, we build outreach and engagement into our entire approach by making it a touch point in every task. This approach begins with a solid foundation of data, organizational input, and a clear understanding of your organization's existing practices and risks.



Raftelis has conducted hundreds of strategic planning efforts nationwide for local governments and public utilities. The team we've assembled brings proven expertise in strategic planning, effective local government management, asset management, solid waste, and sustainability. Our experience translates into the ability to evaluate risk, understand capital investment and maintenance, and incorporate key climate adaptation and resilience principles into the Town's long-term objectives.

We Understand. Our team is unique in that many of us served as local government practitioners before becoming consultants. We know the pressures, dynamics, and challenges of public service. That perspective focuses us on practical strategies that can be implemented while balancing the day-to-day demands of providing services to your community.

The following work plan details how we will approach developing a high-quality climate action plan that achieves the Town's objectives to identify and prioritize climate change vulnerabilities and impacts, focuses on mitigating and adapting to the highest risks, and identifies next steps for implementation.



WORK PROGRAM: OBJECTIVES AND ANTICIPATED OUTCOMES

Work Program: Objectives and Anticipated Outcomes

THE FOLLOWING OUTLINES OUR SCOPE OF WORK FOR DEVELOPING THE TOWN'S CLIMATE ACTION AND RESILIENCY PLAN.

Activity 1: Understanding the Context and Baseline Assessment

A successful climate action planning process requires collaboration between the consulting team and the Town from the start. Activity 1 will strengthen relationships and lay the groundwork for the Climate Action and Resiliency Plan by comprehensively understanding the Town's organizational and operational environments. At the kickoff meeting, our team will meet with the Town's project team to discuss the project, schedule, and communication for the project. It's critical that the project team have a shared understanding of a successful action plan and planning process. Our approach to every project is to establish this common vision at the beginning of the project by developing a project charter and finalized timeline, showing a plan for completing the scope of work.

The Town has already done great work developing plans, reports, and systems supporting the work needed to understand the context of the project and analyze existing conditions. The Raftelis project team will conduct a thorough review of data from the Town including the completed Climate Vulnerability Assessment, Climate Action Plan, Climate Resilience Design Guidance, Zero Waste Framework, Hazard Mitigation Plan, Capital Improvement Plan, Comprehensive Plan, and annual budget documents. At the beginning of this engagement, we will study each of these materials and request additional information as necessary, including maintenance workload data, internal goals or objectives, and other relevant data. This review and analysis will allow Raftelis to identify the unmet goals from key priority areas to inform the Climate Action and Resiliency Planning process. To ensure easy transfer of information, Raftelis will provide a shared online drive where Town staff can upload documents.

Raftelis will also conduct interviews and focus groups with key Town staff and stakeholders to better understand the Town's climate change and resiliency priorities and ensure alignment with existing Town initiatives and goals. We will also review maintenance standards and performance data as well as climate-related data on risks and vulnerabilities specific to the Brookline community and region. This quantitative and qualitative analysis will provide a complete picture of the Town's climate change context and allow us to develop a Technical Memorandum and Matrix.

While working with public agencies, we've learned that accountability is critical to the success of any strategic plan. To ensure the Town's climate action plan is developed *and* implemented, we will also work with your project team to identify an internal, cross-departmental team to guide plan development and ultimately ensure the implementation of climate programs and strategies.

Activity 2: Community Outreach and Engagement

Outreach and engagement are crucial to creating an impactful Climate Action and Resiliency Plan. Recognizing this, we focus on outreach and engagement throughout the planning process, ensuring ample time to earn buy-in, build trust, and enhance understanding around the plan. We understand that community and employee input is critical to the success of this project, so our project team includes local communications experts who have worked

with neighboring communities and are trained in industry best practices. Our Strategic Communications team earned distinctions from the International Association for Public Participation (IAP2) and the Public Relations Society of America, and we have deep experience balancing multiple stakeholders' needs over the course of a project. We are ready to build stakeholder awareness and engage meaningfully with the Town's constituents and internal stakeholders, while incorporating equity and inclusion into the process.



This activity will develop and implement a comprehensive outreach, communication, and engagement plan to engage the Town's internal and external stakeholders throughout the planning process. As a first step, we will review Brookline's Community Engagement Plan to inform our work. Then our team will facilitate an initial workshop with the Town to explore your preferred communications approach, opportunities to seize, and external threats to manage. During this workshop, we will work with you to identify and analyze the many different stakeholders impacted by or interested in the Climate Action and Resiliency Plan, such as staff, Select Board members, community associations, citizens, homeowners and renters, and businesses. After identifying these groups, we will map them on a matrix of interest and influence to help us develop a targeted outreach approach to meet community members where they're at. This approach will support meaningful engagement and the creation of accessible materials that convey the plan's purpose, progress, and how stakeholders can contribute.

Once our team has identified and prioritized stakeholders, we will develop a communication and engagement plan to guide our work throughout the project. The plan will include an outline of key stakeholders, key messages and talking points, and communication channels to reach them, such as in-person events, social media, print materials, website content, and other communication tools. The plan will provide guidelines and recommendations for outreach materials and an implementation timeline to ensure our work aligns with key milestones and input needs.

After we've developed a plan and built a comprehensive understanding of your audience landscape, we'll support implementation of engagement activities, which will include public forums as well as potential surveys, and focus groups to ensure diverse perspectives. We will also develop accessible materials such as infographics, fact sheets, and presentations to simplify complex issues and keep stakeholders informed.

Participation and feedback will be tracked, and insights will be integrated into the climate action plan. Regular reports will be provided to Town's leadership, summarizing outreach effectiveness and stakeholder input.

Activity 3: Assess and Prioritize Strategies and Actions

Using the information collected during Activity 1 and Activity 2, we will work with the Town to assess the strategies and actions already identified in previous planning efforts. Then we will conduct best practice research to identify additional, innovative strategies and actions that can assist the Town in achieving its goals.. This effort will begin with a high-level vulnerability assessment to identify the cascading consequences of climate change for the community and evaluate the level of risk they present for the Town. This includes assessing the Town's **exposure** to climate change, the **impact** of climate change on Town operations and service provision, and the level of **preparedness** the community and organization have for climate change. This process will also incorporate equity by being sensitive to the communities affected by climate change and identifying the neighborhoods disproportionately impacted by climate change and the Town's response to it. Our team of local government operations and asset management subject matter experts will provide perspective on the Town's exposure to and impact of climate change on its infrastructure.

Then using this assessment and research our project team will identify innovative strategies to meet the climate and resiliency goals of the action plan using our industry expertise, experience, and best practice research. Our team will lay the groundwork for problem solving with Town staff to ensure that the solutions and strategies identified are implementable and measurable.

These activities set the foundation for a comprehensive Climate Action and Resiliency Plan that addresses the Town's vulnerabilities, long-term objectives, and incorporates novel ideas. We will then work with the Town to identify the key themes composing the plan framework. With input from the Town's project team, we will plan and facilitate an action planning workshop with Town leadership and staff. The agenda and session goals will be structured to develop a preliminary framework for the Climate Action and Resiliency Plan, prioritize mitigation and adaptation actions identified, and elicit feedback on strategies. The workshop will result in a draft of the vision, goals, and targets for the action plan. This will also serve as the basis for detailing out strategies to address and mitigate climate change impacts and support implementation.

Activity 4: Define Framework and Create Dashboard

In partnership with Town staff, our team will use the finalize the framework. Then the framework will be used to develop, evaluate, and specify climate action strategies to address the risks and achieve the goals identified during the workshop. This will also include identifying metrics or Key Performance Indicators (KPIs) that the Town can use to monitor progress towards the climate action plan goals in addition to developing financial estimates for accomplishing identified goals in the plan. The draft framework, strategies, and metrics will be provided to Town staff for feedback before submittal to the Zero Emissions Advisory Board or Select Board for review and comment.

When done effectively, organizations make significant investments of often-scarce resources in strategy development and execution. The final stage – tracking, monitoring, and reporting – is how they demonstrate return on that investment. Progress can be tracked and monitored in a variety of ways and with a variety of tools. Specialized technology can be especially useful in reporting. Part of the value of action planning is that it's a communication tool and regularly reporting on progress helps to sustain the involvement and engagement of stakeholders who participate in strategy development.

Raftelis has developed a straightforward and easy to use dashboard to monitor and report on progress. Ellio Performance allows organizations to monitor progress towards specific strategic goals and objectives and can be customized to track specific performance indicators unique to each organization. This feature enables focus on what matters most to your organization with tailored performance tracking. With Ellio, you can assign leads responsible for the various aspects of the Climate Action and Resiliency Plan, identify steps toward implementing the plan, and track measurable outcomes of your organization's performance. Clear and simple dashboards and reports provide high-level status and make it easy to identify and drill down into areas needing attention.



Activity 5: Implementation Roadmap and Final Deliverables

Our best-laid plans are useless if they are not thoughtfully executed; a successful action plan will rest upon the Town's effective implementation. As local government practitioners, we have a bias toward implementation, and our focus is to guide the Town toward a clear and actionable path forward. Raftelis will prepare a customized implementation template for the Town and work with designated Town staff to develop implementation plans for each goal area and associated strategies to support that goal. The implementation template will include steps to achieve outcomes, the responsible party assigned to each outcome, and resources. We will collaborate to develop metrics for each outcome area in the plan, allowing the organization and the community to track progress. Our local government financial planning experts will work with Town staff to develop financial estimates to incorporate into the Town's budgeting process. While we will identify an implementation team at the beginning of this engagement, the team should also be adjusted based on the strategies ultimately included in the plan.

After the above activities, our project team will prepare a comprehensive and attractive deliverable encapsulating the Climate Action and Resiliency Plan. This will include a summary of the entire planning process and methodology and the action planning framework, including vision, goals, targets, and strategies. Our team will also present the plan to the Zero Emissions Advisory Board and Select Board for adoption.

DELIVERABLES

Deliverables

ACTIVITY 1 DELIVERABLES:

- Data and document request
- Interviews with staff and stakeholders
- Technical Memorandum and Matrix

ACTIVITY 2 DELIVERABLES:

- Community Outreach, Communication, and Engagement Plan
- Completion of two (2) public forums to collect public input on the Climate Action and Resiliency Plan
- Engagement activities and summary reports, to be determined at kickoff meeting
- Communication materials to reach stakeholders, to be determined at kickoff meeting

ACTIVITY 3 DELIVERABLES:

- Draft Mitigation and Adaptation Actions and Implementation Strategies
- Draft and final action planning workshop agenda

ACTIVITY 4 DELIVERABLES:

- Draft and final Climate Action and Resiliency Plan framework, strategies, and measures
- Dashboard for tracking implementation progress

ACTIVITY 5 DELIVERABLES:

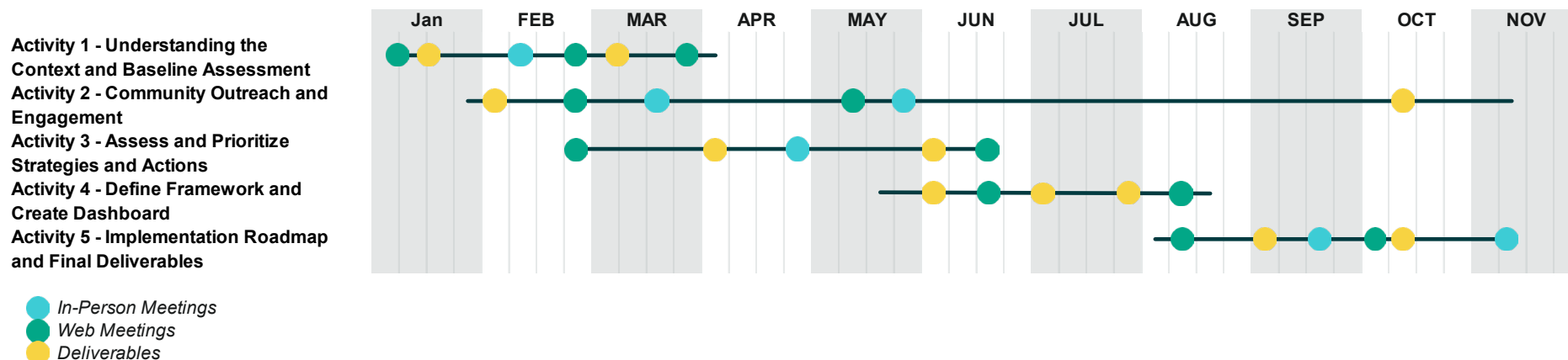
- Draft and final Climate Action and Resiliency Plan deliverable
- Implementation plan, including strategies and performance metrics
- Up to three (3) presentations: Zero Emissions Advisory Board, Select Board, and other relevant bodies as requested

WORK SCHEDULE

Work Schedule

A draft timeline is included. We expect to refine this with the Town during Activity 1. This schedule was developed based on the needs outlined in the RFP.

Our scope of work assumes we complete the project according to the schedule provided below. If the Town elects to extend the project completion schedule beyond the initial schedule, we will work with the Town to identify any necessary revisions to the project budget.



PROJECT LEADERSHIP, ORGANIZATION, AND MANAGEMENT

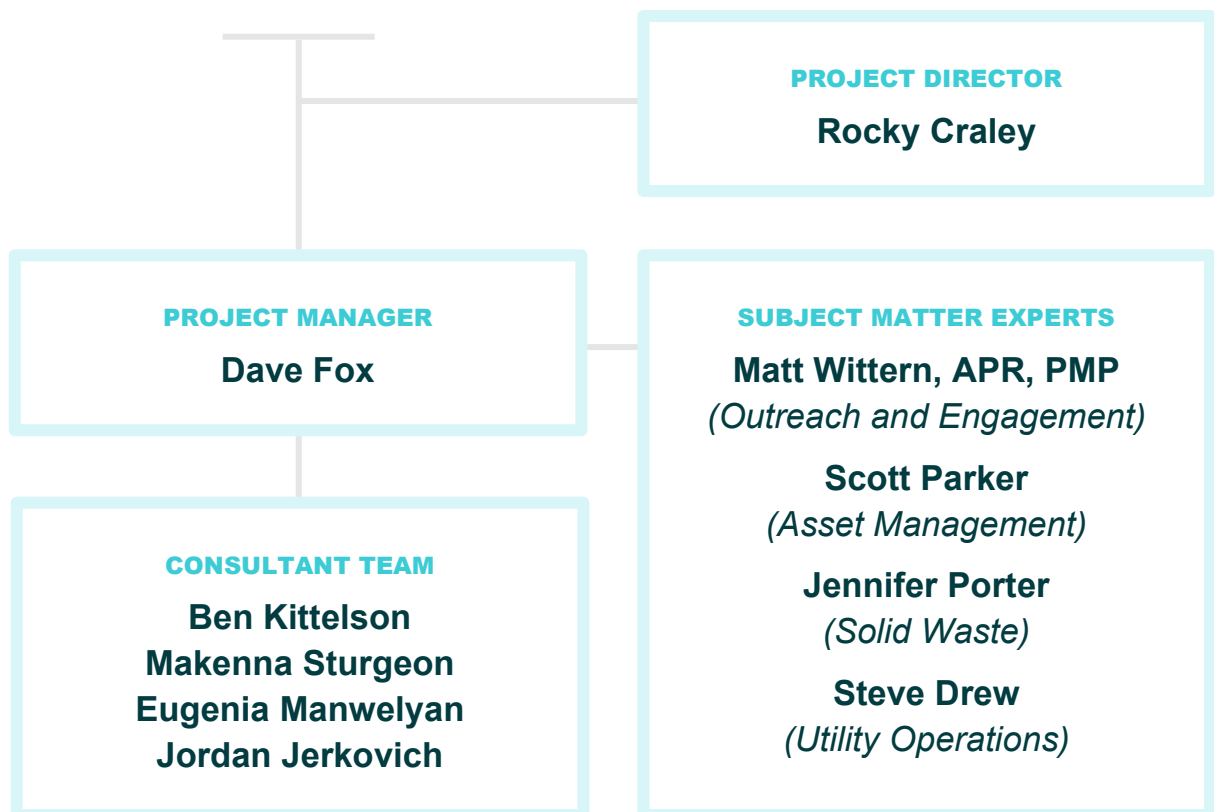
Project Leadership, Organization, and Management

OUR TEAM OF CONSULTANTS SPECIALIZES IN THE ELEMENTS CRITICAL TO DEVELOPING A SUCCESSFUL CLIMATE ACTION AND RESILIENCY PLAN.

Through strategic consulting, Raftelis partners with local governments and utilities to enhance performance, plan, and improve financial conditions. With a team of former municipal leaders, we provide expert guidance, and a proven process tailored to each organization's unique needs.

Raftelis' organizational structure is designed to allow members of our executive team to devote a significant amount of time to the Town consulting activities. The Project Director has ultimate accountability for meeting the technical requirements of the project and for providing guidance on the strategic direction of the engagement. The Project Manager is responsible for the Town's communications, project management, and ensuring the project meets the Town needs in an efficient and effective manner. At the direction of the Project Manager, Raftelis assigns staff consultants who are responsible for conducting analysis and developing work products. Our team will have the support of Subject Matter Experts for this engagement, as necessary. On the following pages, we have included resumes for each team member and a description of their role on the project.

Town of Brookline



Rocky Craley

PROJECT DIRECTOR

ROLE

Rocky will be responsible for overall project accountability and will be available to provide quality assurance and control, management perspective, and financial analysis into the project.

PROFILE

Rocky has been with Raftelis for 17 years helping utilities and the public sector develop solutions to their unique financial and operational challenges. Rocky assists utility and public sector partners in a number of areas, including financial and strategic planning, plan implementation, benchmarking and metric tracking, cost of service, risk analysis, utility policy, rate cases, financial capability assessments, and staff augmentation.

Rocky is the executive lead of Raftelis' climate action and resilience internal community of practice. He leads a team of 20 colleagues in exploring how Raftelis can use its expertise to empower local government and utility leaders to adapt to climate change and build resilient communities. Rocky is leading the firm in using its strategic planning, strategic communication, assessment, finance, community engagement, stormwater, and solid waste capabilities to assist public sector organizations plan and achieve their goals.

Rocky is also the executive lead for Raftelis' Ellio Performance tool that assists public sector organizations implement and monitor their plan implementation using easy-to-use cloud-based software and dashboards.

Rocky's key recent strategic planning experience includes:

- Onondaga County Water Authority (NY) Strategic Plan development.
- Sewerage and Water Board of New Orleans (LA) Strategic Plan and Implementation Support
- Birmingham Water Works Board (AL) Strategic Plan and Implementation Support
- Philadelphia Water Department (PA) Strategic Plan development

Rocky has significant experience engaging boards, councils, and the public. He has presented financial and operational results before numerous governing bodies. He has participated in board retreats, one-on-one briefings, and interviews. On behalf of public partners, Rocky has engaged members of the public, including elected officials, large industry representatives, economically disadvantaged members of the community, and special interest groups. In addition to assisting with the facilitation of the strategic planning and implementation efforts of the projects listed above, Rocky also provides facilitation expertise for several financial projects. For Lehigh County Authority, Rocky has facilitated sessions of 14 municipalities exploring new regional inter-local agreements and alternative wastewater cost-sharing approaches. Similarly, Rocky served in a facilitator role for North Texas Municipal Water District, assisting with the discussion of alternative cost sharing approaches among 13 member cities.



Commitment

- 10% of total project hours

Specialties

- Long range financial planning & feasibility studies
- Strategic planning studies
- Cost-of-service studies
- Alternative rate structure studies
- Cost analysis & cost allocation
- Conservation pricing
- Surveys & benchmarking analyses
- Risk analysis
- Policies
- Miscellaneous fee studies
- Interim financial staff augmentation
- Climate and resilience lead
- Ellio executive lead

Professional History

- Raftelis: Vice President (2022-present); Senior Manager (2019-2021); Manager (2015-2018); Senior Consultant (2011-2014); Staff Consultant (2008-2011)

Education

- Master of Science - Carnegie Mellon University (2006)
- Bachelor of Arts - Princeton University (2004)

Professional Memberships

- American Water Works Association
- Water Environment Federation (WEF): Utility Management Committee
- Chair of Finance and Administration Subcommittee for WEF

Certifications

- Series 50 Municipal Advisor Representative

Dave Fox

PROJECT MANAGER

ROLE

Dave will serve as the Town's main point of contact for the project. Dave will manage the day-to-day aspects of the project, ensuring it is within budget, on schedule, and effectively meets the Town's objectives.

PROFILE

Dave has 13 years of experience in financial and management consulting. He has worked with water, wastewater, and stormwater utilities on a variety of studies including cost-of-service and rate setting, impact fees, financial planning, utility valuation, economic feasibility and modeling, bond feasibility and coverage certificates, utility and customer affordability, data analysis, as well as water and wastewater benchmarking and rate surveys. Dave leads Raftelis' New England Office based in Natick, MA.

Dave has served as project manager on a number water and sewer rate studies for municipalities in Massachusetts, including the Town of Brookline (Town). Over the past several years, Dave has assisted the Town with several water and sewer financial planning and rate related matters. He has worked closely with the Town to establish a sustainable financial plan for the water and sewer funds, including recommendations for reserve fund balance targets, operation and maintenance cost recovery, and the financing of capital reinvestment. Dave also assisted the Town in restructuring its water and sewer rates with volumetric rate changes in order to enhance equity and affordability, and also the implementation and management of fixed charges for purposes of increasing the Town's revenue stability on an annual basis. Recently, Dave also worked with the Town on an affordability assessment to understand the degree in which water and sewer rates are burdening low-income residents of the Town, and helped the Town identify potential solutions to ensure that no Town resident be without access to clean and reliable water and sewer service.

Dave also assisted the City of Lebanon (City), NH with performing an economic analysis regarding the City's options for utilizing its landfill gas production as a revenue generating mechanism in order to provide an economic benefit to the City and its residents, while at the same time reducing the City's contribution of greenhouse gas emissions. Dave prepared an economic model to analyze the additional costs (capital and operating) and benefits (energy generation & cost avoidance) associated with each technically feasible alternative. In doing so, Dave, in conjunction with the City's project team, conducted sensitivity analysis on key parameters in the analysis, such as the amount of landfill gas captured, energy prices, renewable energy certificates, etc. to test the economic viability of the project under various assumptions, and provide a potential range of economic outcomes. Over the course of the project, Dave provided economic analyses for 13 different technical alternatives. Ultimately, it was determined that the City purchasing, installing, and operating five highly-efficient microturbines to convert all of the City's landfill gas to electricity clearly provided the most economic benefit to the City and its residents. The generated electricity (approximately 1,000 kilowatts) will be redistributed to the electric grid, and also utilized to power all of the City's facilities. This not only accomplishes the City's goal of saving its residents money, but also reduces greenhouse gas emissions by 3,500 tons per year. The project is anticipated to be completed and operational in late 2024.



Commitment

- 16% of total project hours

Specialties

- Financial planning studies
- Utility cost-of-service & rate studies
- Economic feasibility & forecast studies
- Affordability studies
- Customer demand & data analyses

Professional History

- Raftelis: Vice President (2023-present); Senior Manager (2021-2022); Manager (2017-2020); Senior Consultant (2015-2016); Consultant (2013-2014); Associate (2011-2012)

Education

- Master of Arts in Economics - Clemson University (2010)
- Bachelor of Science in Economics - Coastal Carolina University (2009)

Professional Memberships

- AWWA
- New England Water Works Association: Member of Financial Management Committee
- Massachusetts Water Works Association

Matt Wittern APR, PMP

SUBJECT MATTER EXPERT – OUTREACH AND ENGAGEMENT

ROLE

Matt will provide input and guidance as a Subject Matter Expert for the outreach and engagement components of this project.

PROFILE

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

Over the course of his tenure at Raftelis, Matt has worked with several Northern Colorado communities, including on projects with City of Arvada, Northern Water, City of Greeley, Town of Erie, and City of Wheat Ridge.



Commitment

- 8% of total project hours

Specialties

- Strategic communication planning
- Stakeholder engagement
- Public involvement
- Community outreach
- Primary & secondary research
- Expert positioning
- Media relations
- Social media
- Art direction
- Reputation management
- Coalition building
- Advocacy campaigns

Professional History

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

Education

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

Professional Memberships

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

J. Scott Parker

SUBJECT MATTER EXPERT - ASSET MANAGEMENT

ROLE

Scott will provide input and guidance as an Asset Management Subject Matter Expert for the project's strategy and action development component.

PROFILE

Scott brings over 20 years of experience in local government, utility management, and consulting. Before joining Raftelis, he served as Asset Manager for KC Water in Kansas City, MO, and Assistant Director of Public Works in Olathe and Lenexa, KS, overseeing finance, data management, solid waste, field operations, and capital projects. He has consulting experience in capital planning, financial analysis, asset management, and interim executive roles.

Scott's wide range of experience has given him extensive leadership and technical expertise in the fields of asset management, information technology, and operations in multiple domains. This has allowed him to design, develop, and implement asset management programs in three (3) communities based on capital optimization strategies and asset management best practices. As an Asset Management practitioner, Scott has used his understanding of the field to design teams that combine the best theoretical concepts of asset management with the opportunities and cultural circumstances specific to the organizations for which he has worked. He has demonstrable experience working with multiple data technologies and systems in the asset management and utility space. In Kansas City, he developed the organization's first data management strategic plan.

Scott has developed business risk exposure (Consequence and Likelihood of Failure) models utilized for investment decisions across multiple asset classes, including streets, water, sewer, and stormwater. In Kansas City, he helped reconceptualize and reformulate the criteria for the utility's Annual Sewer Rehabilitation and Water Main Replacement Programs (total value \$65m/year) to a truly risk-based model from a break and fix model. Scott has led the development of multi-billion-dollar capital improvement plans in communities throughout the country as both an employee and consultant. He has extensive experience with all elements of utility capital planning, financing, and project delivery. At KC Water, he developed an alternative capital plan that was utilized for the Consent Decree renegotiations with the EPA and reduced the city's commitment by \$1.3 billion over the original program, while assuring more time to meet the tenants of the decree.



Commitment

- 2% of total project hours

Specialties

- Asset Management for utilities and local governments
- Capital Planning, Budgeting, and Implementation
- Data Strategic Planning, Management and Governance
- Business Risk Exposure (BRE) and Decision Support System (DSS) methodologies for infrastructure
- Data Analytics and Business Intelligence standards
- Business Process Modeling
- Performance Management (measurement, dashboarding, etc.)
- Organizational Design and Capacity Building
- Utility Governance

Professional History

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

Education

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

Professional Memberships

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

Jennifer Porter

SUBJECT MATTER EXPERT – SOLID WASTE

ROLE

Jennifer will provide input and guidance as a Solid Waste Subject Matter Expert for the project's strategy and action development component.

PROFILE

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

Jennifer has conducted a variety of sustainability and waste management projects for local governments across the country. In Baltimore County, MD she provided subject matter expertise and managed the County's Solid Waste Work Group to develop a Five-Year Tactical Plan examining the solid waste collection and disposal practices. The team made recommendations for implementing innovative industry practices and trash diversion strategies to reduce the overall volume of trash produced in the county. Jennifer worked on a project for Hartsfield-Jackson Atlanta International Airport in Georgia to develop an Airport Sustainable Management Plan. She led tasks related to waste management, reuse, recycling, composting, sustainable procurement, circular economy, waste audits, and development of recommendations for implementation of a comprehensive solid waste management program to achieve zero waste goal.

Jennifer was project manager leading the team developing a long-term solid waste master plan for Orange County, NC, *Road to Zero Waste Plan*, aiming to identify a sustainable business model for managing waste that considers the financial, social, and environmental impacts on the community while setting forth the future programs, initiatives, facilities, and infrastructure needed to reach the plan goal of zero waste by 2045. The County moved to implementation with both a short- and long-term path forward. Engaging traditionally marginalized groups was mission critical for this project and the outreach included a farmer's market blitz, one-on-one meetings, engaging signage and materials, as well as an online community survey and on-site meeting interpreters in English, Spanish, Burmese and Mandarin.



Commitment

- 2% of total project hours

Specialties

- Solid waste/Zero waste
- Circular economy
- Planning and scenario evaluation
- Sustainable materials management
- Finance and infrastructure planning/implementation
- Procurement & contract negotiation

Professional History

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

Education

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

Certifications

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

Professional Memberships

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

Steve Drew

SUBJECT MATTER EXPERT – UTILITY OPERATIONS

ROLE

Steve will provide input and guidance as a Utility Operations Subject Matter Expert for the project's strategy and action development component.

PROFILE

Steve brings over 40 years of experience in water utility management, municipal leadership, and consulting. He began his career with the City of Greensboro, NC, Water Resources Department, where he held various technical and managerial roles. He ultimately served as Director of Water Resources and later Assistant City Manager until his retirement in 2020. Steve has extensive experience in organizational improvement, governance, strategic planning, disaster preparedness, capacity development, and capital improvement.

During Steve's time as Greensboro assistant city manager (2018 – 2019), he served as interim sustainability administrator, responsible for organizing a temporary Office of Sustainability & Resilience in preparation for the permanently funded and staffed office in place today. Several priority directives central to sustainability program development were set by the Greensboro City Council. The centerpiece initiative included Greensboro participating in the US Green Building Council's LEED for Cities & Communities program. Steve facilitated the application process in 2019, attended LEED for Cities workshops in Washington DC with key city staff members, facilitated efforts with the Greensboro Community Sustainability Council, marshalled data collection efforts and worked with city department leaders on goal setting. These efforts led to the LEED for Cities "Silver" designation awarded to Greensboro. As part of long-term goal setting for the purpose of meeting higher standards set forth by LEED for Cities & Communities, the Greensboro Water Resources Department joined the Water Environment Federation's Utility of the Future Today program which focuses on resource efficiency and recovery, working with community stakeholders, leading to resilient and sustainable utility operations.

Steve's wide range of experience has informed his extensive technical knowledge and administrative expertise in the areas of water and wastewater operations, asset management, regulatory compliance, general utility management, customer service, executive leadership, assessment, and affecting positive organizational change. As a result, City leadership consistently trusted his recommendations, leading to development and implementation of strategies that addressed a wide range of improvements, upgrades, and efficiencies regarding physical assets, operations, and associated fiscal impact.



Commitment

- 2% of total project hours

Specialties

- Strategic planning
- Organizational assessments
- Continuity & resiliency of utility operations
- Workforce development
- Diversity & inclusion
- M/WBE support and development
- Disaster preparedness
- Crisis management
- Media communications
- Governance

Professional History

- Raftelis: Senior Advisor (2024-present); Principal Consultant (2022-2023)
- Independent Consultant (2020-2022)
- City of Greensboro, NC: Interim Assistant City Manager (2018-2019)
- Water Resources Utility Director (2012-2020)
- Operations Manager (2010-2012)
- Water Supply Division Manager (2001-2010)
- Superintendent of Plant M&O (1989-2001)
- Electronics Technician & Plant Mechanic (1979-1989)

Education

- Bachelor of Arts Political Science - University of North Carolina at Greensboro (1985)

Certifications

- NC "A" Surface and "C" Well Water Treatment Facility Operator
- Public Executive Leadership Academy, UNC School of Government
- Micro MBA, Virginia Tech AWWA Utility Leadership

Professional Memberships

- American Water Works Association
- Water Environment Federation
- NC One Water
- NC Water Operator's Association
- Society of Maintenance and Reliability Professionals
- National Forum for Black Public Administrators (Life-Time Honorary Membership)

Ben Kittelson

STAFF CONSULTANT ROLE

Ben will work at the direction of Dave in supporting and preparing deliverables for the project.

PROFILE

Ben began consulting in 2019 after seven years of direct service to local governments on the East and West Coast. Most recently, Ben worked for the Budget and Management Services Department in the City of Durham, North Carolina. He worked on the annual budget and the community-wide strategic plan. He completed revenue projections for sales tax and water sales, assisted with financial planning for affordable housing, and led community engagement efforts to inform the City's budget process. As a consultant, Ben has worked on more than 70 projects across 24 states evaluating local government operations and identifying actionable recommendations. His work helps local government organizations improve services and become more effective through staffing and workload analysis, process improvement, and policy and procedure review. Ben has assessed various local government operations, including public safety, public works, utilities, parks, human resources, and development review. Ben is skilled at connecting operational needs with the organization's strategic priorities and community expectations.



Commitment

- 15% of total project hours

Specialties

- Strategic planning
- Facilitation

Professional History

- Raftelis: Manager (2024-present); Senior Consultant (2022-2023) Consultant (2020-2021); Consultant, The Novak Consulting Group: (2019-2020)
- City of Durham, NC: Senior Budget and Management Analyst (2016-2019)
- Guilford County, NC: Budget and Management Analyst (2014-2016)

Education

- Master of Public Administration - Portland State University (2014)
- Bachelor of Arts in Politics and Economics - Willamette University (2012)

Makenna Sturgeon

STAFF CONSULTANT ROLE

Makenna will work at the direction of Dave in supporting and preparing deliverables for the project.

PROFILE

Makenna helps public agencies tell their stories through strategic communication plans, digital media campaigns, and impactful print and digital materials. Makenna's work is driven by her passion for sustainability and organizational resiliency. She has supported local governments in conservation and education efforts, including assisting the Northern Colorado Water Conservancy District with communication strategies for the \$1.1 billion Northern Integrated Supply Project. Millions of dollars, years of planning and thorough environmental study and protections hang in the balance. Raftelis was hired to assist Northern with development of a comprehensive public outreach and information campaign to ensure continued public support. Before coming to Raftelis, she served as the Training and Marketing specialist for the Colorado Municipal League, leading the League's marketing efforts and developing and facilitating trainings for elected officials across the state.



Commitment

- 15% of total project hours

Specialties

- Strategic communication planning
- Strategic planning
- Organizational assessments
- Stakeholder engagement
- Collateral development

Professional History

- Raftelis: Consultant (2024-present); Associate Consultant (2023)
- Colorado Municipal League: Training and Marketing Specialist (2021-2022)
- Pac/West Strategies: Communications Associate (2020-2021)

Education

- Bachelor of Arts, Journalism - University of Colorado Boulder (2019)

Eugenia Manwelyan

STAFF CONSULTANT ROLE

Eugenia will work at the direction of Dave in supporting and preparing deliverables for the project.

PROFILE

Eugenia is a well-versed planning practitioner with 15 years of experience in sustainability, resilience, community engagement, and environmental justice. She has occupied a wide range of multi-disciplinary roles as a consultant, county government senior planner, non-profit executive director, and visiting professor at Columbia University. She has implemented projects ranging from waste recovery and community solar to circularity and climate resilience. Eugenia has an up-to-date understanding of the newly available federal funding resources for environmental infrastructure and has extensive experience matching these resources with high impact projects that solve complex problems. She has helped public and private sector clients navigate and apply for grants, loans, and newly available tax credits. Eugenia has given talks and published articles about operationalizing equity and using federal resources to build climate resilient infrastructure.



Commitment

- 15% of total project hours

Specialties

- Federal funding and resources
- Environmental justice, DEI,
- Circularity and resilience planning
- Zero waste

Professional History

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

Education

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

Jordan Jerkovich

STAFF CONSULTANT ROLE

Jordan will work at the direction of Dave in supporting and preparing deliverables for the project.

PROFILE

Jordan has diverse local government experience across multiple service areas, jurisdictions, and countries, including roles in sustainability, administration, procurement, and community development in Sweden, Scotland, and the U.S. Most recently, he served as Community Development Director for Lindsborg, KS, overseeing current and long-range planning, development services, and special projects. Jordan's expertise spans local government administration, housing policy and development, climate change, sustainability, and community engagement.

As a Consultant at Raftelis, Jordan supports strategic planning, organizational assessments, and facilitation services. He holds a Master of Public Administration from the University of Kansas and a Master of Science in Strategic Leadership towards Sustainability from Blekinge Institute of Technology in Sweden where he co-authored his thesis "Pursuing Sustainability and Prosperity in Swedish Municipalities: Using Indicators to Inform Strategic Governance." He also holds dual bachelor's degrees in environmental studies and business management. Jordan served as Vice Chair of the McPherson Housing Coalition, working to provide housing for low- and moderate-income families.



Commitment

- 15% of total project hours

Specialties

- Strategic plans
- Organizational assessments
- Process improvement
- Climate and sustainability

Professional History

- Raftelis: Consultant (2023-present)
- City of Lindsborg, Kansas: Community Development Director (2021-2023)
- Stirling Council, Scotland: Administrative Support Officer (2020-2021)
- City of Grandview, Missouri: Management Intern (2019)
- Blekinge Institute of Technology,

RESPONDENT PROFILE

Respondent Profile



RAFTELIS, HELPING LOCAL GOVERNMENTS THRIVE

For 31 years, local government leaders partner with Raftelis to transform their organizations by enhancing performance through innovative solutions, planning for the future, identifying top talent, improving their financial condition, and telling their story. We've helped more than 700 organizations in the last year alone. We provide trusted advice, and our experts include former municipal and utility leaders with decades of hands-on experience running successful organizations. People who lead local governments and utilities are innovators—constantly seeking ways to provide better service to the communities that rely on them. Raftelis provides management consulting expertise and insights that help bring about the change that our clients seek.

Our Deep Bench

Raftelis' services span several issue areas ranging from strategic planning to financial planning and asset management. This broad array of perspectives allows us to approach projects from every angle, determining the feasibility of the strategies through a political, organizational, and financial lens. The team we've created to develop the Town's Climate and Sustainability Action Plan brings expertise from each of these backgrounds to ensure the plan aligns with your organization's broader vision, is easy to implement, and achieves your long-term objectives.

We believe that Raftelis is the *right fit* for this project. We provide several key factors that will benefit the Town 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 is specialized and has devoted their career to helping public agencies serve thriving communities.

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 utility director, and they have led dozens of strategic planning initiatives across the country.

LOCAL TEAM MEMBERS: We understand the importance of understanding a local landscape when it comes to building outreach strategies and planning for the future. We've included three Colorado-based consultants on the project team to ensure we can support the Town every step of the way. Each member of our Colorado-based team has experience working with Northern Colorado communities.

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 stakeholders, links strategy to performance, and sets the organization up for effective implementation.

COMMITMENT TO LEARNING: Just as we expect our communities to adapt to the changing environments, we ask our team members to do the same. Raftelis encourages its employees to engage with industry associations, participate in regular trainings, and pursue additional education to ensure we're always up to date on industry best practices and new approaches to tackle the challenges our clients are facing.

PROJECT EXAMPLES

Project Examples

RAFTELIS HAS ONE OF THE MOST EXPERIENCED LOCAL GOVERNMENT FINANCIAL AND MANAGEMENT CONSULTING PRACTICES IN THE NATION.

Our work is grounded in sustainability and resilience. Organizations across the nation continue to seek new approaches to mitigate risks and serve their communities more effectively. Whether it be supporting communication about a conservation program, developing a financial plan to help utilities address drought, or creating a strategic plan that prioritizes a Town's sustainable initiatives, our experience provides us the background we need to empower public agencies to adapt their changing environments.

Our staff has assisted more than 1,700 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 1,300 strategic planning, financial, management, and/or technology consulting projects for over 700 public-sector agencies in 47 states, the District of Columbia, and Canada. 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. Below are references for similar contracts performed in the last five years.

Steamship Authority MA

Reference: Bob Davis, General Manager
228 Palmer Avenue, Falmouth, MA 02540 / P: 508.548.5011 / E: rdavis@steamshipauthority.com

Date of Service: January 2023 – March 2024

The Steamship Authority runs the largest ferry service to the islands of Martha's Vineyard and Nantucket from Cape Cod on the mainland of Massachusetts. In early 2023 the Authority engaged Raftelis to prepare its strategic plan. Our team reviewed documents, interviewed Board and Port Council members, held staff interviews and focus groups, and surveyed all staff on mission and vision statements, and interviewed key stakeholders across the islands served by the Authority. Raftelis prepared an environmental scan and developed the draft framework in May 2023. The team then worked to solicit community input on the framework and facilitated additional workshops with the Board and staff to finalize the framework. To complete the plan Raftelis worked with staff to identify specific implementation strategies and the plan was adopted in March 2024.



Town of Shrewsbury MA

Reference: Kevin J. Mizikar, Town Manager
100 Maple Avenue, Shrewsbury, MA 01545 / P: 508.841.8508 / E: KMizikar@ShrewsburyMA.gov

Date of Service: January 2022 – January 2023

Raftelis prepared a strategic plan for the Town of Shrewsbury (Town). The workplan included working closely with the Town's Management Team, including all department heads, preparation of an environmental scan, an online survey of all Town staff to gain their input, public visioning sessions open to the community and stakeholders, a

strategic planning workshop with the Board of Selectmen, preparation of an implementation template, and meetings with staff goal teams to develop metrics for each goal area.

Pinellas County FL

Reference: Don Moore, Director of Fleet Services

9685 Ulmerton Road, Largo, FL 33778 / P: 727.464.4546 / E: dbmoore@pinellas.gov

Date of Service: June 2021 – September 2021

Pinellas County (County) engaged Raftelis to conduct an organizational assessment of the County's Fleet Management Division. In addition to a review of operations, organizational structure, and staffing needs, the assessment included identifying the best practices for implementing a green fleet initiative. Raftelis evaluated the cost and environmental implications associated with implementing a vehicle electrification plan in the County's fleet. The project team consulted industry best practices and peer organizations to identify a roadmap for adding alternative fuel vehicles to the County's fleet. This included short- and long-term recommendations to convert from traditional vehicles to electric vehicles. The assessment evaluated the costs and benefits of vehicle electrification to inform policy deliberations. The project team analyzed the County's fleet units and the types of vehicles with the potential to be electrified, as well as the costs associated with purchasing, maintaining, and operating EVs and identified key performance indicators to monitor over time.

City of Tempe AZ

Reference: Brianne Fisher, Climate Action Manager

31 E. 5th St., Tempe, AZ 85281 / P: 928.965.4963 / E: brianne_fisher@tempe.gov

Date of Service: May 2023 - Ongoing

Raftelis is engaged with the City of Tempe (City) to determine the feasibility of establishing an urban cooling and stormwater utility to equitably recover costs associated with the City's growing programs designed to manage extreme heat and stormwater. The City wishes to develop a multi-objective approach to urban cooling and stormwater management by combining conventional stormwater infrastructure with green stormwater infrastructure (GSI), urban forestry, and low-impact development. As part of this engagement, Raftelis is establishing investment scenarios to meet the City's urban cooling goals, which aim to increase tree canopy across the City. Raftelis deliverables include a financial planning model with draft rates based on each of the investment scenario and a phased approach for implementation.

City of Charlotte NC

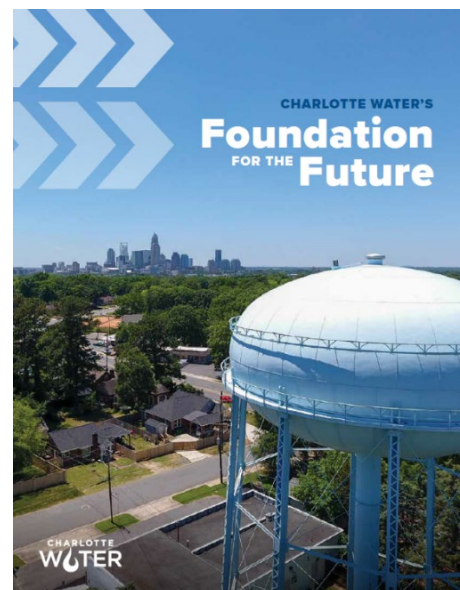
Reference: Melissa Westfall, Charlotte Water Chief Financial Officer

5100 Brookshire Blvd. Charlotte, NC 28216 / P: 980.505.6455 /

E: melissa.westfall@charlottenc.gov

Date of Service: April 2020 – February 2021

Equity. Sustainability. Resilience. As the focus areas of the City of Charlotte's (City) 2020 Budget, these goals are critical as Charlotte continues to grow and flourish as a richly diverse community. Very few services provided by the City have as much influence as water service, and Charlotte Water's strategic plan needed to reflect and advance these goals. Raftelis was engaged to facilitate Charlotte Water's strategic plan through an inclusive process that was designed to build on and amplify the voices of its customers, through listening and public engagement sessions; its region, through interviews with each of the municipalities served by the utility; and its employees, through focus groups, interviews, a survey, and active



participation in different aspects of the process. Along the way, employees were kept up to date on the strategic plan progress and the results of activities were shared at each step to keep the employees of this large organization engaged. The resulting strategic plan highlights a focused vision and mission and the priority areas that Charlotte Water will focus on for the next five years to move the organization forward. Clear strategic plan communication and successful implementation are high priorities for Charlotte Water. Raftelis has assisted the organization through the communication roll-out of the plan and the first year of implementation to ensure the plan becomes part of day-to-day operations

Madera County CA

Reference: Jared Carter, Deputy Public Works Director

200 W. 4th Street, Madera, CA 93637 / P: 559.675.7811 / E: jcarter@maderacounty.com

Date of Service: January 2023 – August 2023

Madera County (County) engaged Raftelis to conduct a Solid Waste Management Study and provide recommendations for solid waste management moving forward. A key element of this project included reaching and soliciting feedback from the County's diverse stakeholders. The County includes incorporated and unincorporated communities, many of which are smaller, disadvantaged communities with varying needs and priorities for the level of solid waste service. To ensure every community member had the opportunity to provide input, Raftelis used traditional and non-traditional outreach methods, including four in-person outreach events in two different locations, social media and newspaper ads to market events and input opportunities, organic social media posts, an online survey with English and Spanish versions, in-depth interviews with representatives from diverse stakeholder and interest groups, an English and Spanish microsite with study information, and earned stories in the local media. At the end of the study, the County was able to adopt a solid waste management recommendation that reflected the community's input.



Metropolitan Government of Nashville and Davidson County TN

Reference: Amanda Deaton-Moyer, Metro Finance Department Assistant Director

1417 Murfreesboro Pike, Nashville, TN 37217 / P: 615.862.4782 / E: amanda.deaton-moyer@nashville.gov

Date of Service: September 2023 – March 2024

The Metropolitan Government of Nashville and Davidson County (Metro), serving over 2 million residents, recently approved a solid waste master plan that set a policy directive to reach zero waste over the next 25 years, defined as 90% diversion from landfill disposal. To meet this strategic outcome, Raftelis partnered with Metro to analyze a fee-based financial structure designed to incentivize waste reduction and diversion, as well as organizational structure and resource recommendations that best position the organization to meet stated sustainability goals through phased advancement of successful programming like a food waste pilot program.

CONFLICT OF INTEREST (COI) POLICY STATEMENT

Conflict of Interest (COI) Policy Statement

Before pursuing any opportunity, we carefully evaluate potential conflicts to ensure they will not hinder our ability to proceed effectively. 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 Town 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 the Town's contact. They have also included detailed monthly written reports describing the status of the project.

APPENDIX: FORMS

Appendix: Forms





TOWN OF BROOKLINE

Massachusetts

DEPARTMENT OF FINANCE
PURCHASING DIVISION

333 Washington Street
Brookline, MA 02445
617-730-2195
Fax: 617-264-6446

CERTIFICATE OF NON – COLLUSION

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word “person” shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

Signature of individual submitting bid or proposal

Raftelis Financial Consultants, Inc.

Name of Business

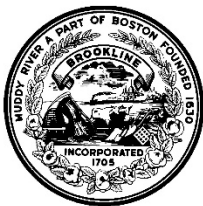
TAX COMPLIANCE CERTIFICATE

Pursuant to M.G.L. c. 62C, §49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

Signature of individual submitting bid or proposal

Raftelis Financial Consultants, Inc.

Name of Business



TOWN OF BROOKLINE

Massachusetts

DEPARTMENT OF FINANCE
PURCHASING DIVISION

333 Washington Street
Brookline, MA 02445
617-730-2195
Fax: 617-264-6446

Certificate of Compliance with Article 4.4 FAIR EMPLOYMENT PRACTICES WITH REGARD TO CONTRACTS of the Town of Brookline By-Laws

I, Rocky Craley/Raftelis Financial Consultants, Inc. (printed name of individual/employer contracting with the Town) hereby certify that I shall comply with the Fair Employment Practices in fulfilling the terms of the contract that I propose to enter into with the Town of Brookline, and to which this Certificate is appended. By its signature on this Certification, the undersigned indicates it has reviewed Article 4.4 of the General Bylaws of the Town of Brookline and agrees to incorporate into an Agreement the necessary provisions related to fair employment practices and non-discrimination.

Signed under the pains of penalties of perjury, on this 18 day of November, 2024;

Contractor

Certificate of Compliance with Article 4.5 DISCRIMINATION PROHIBITION WITH REGARD TO CONTRACTS of the Town of Brookline By-Laws

I, Rocky Craley/Raftelis Financial Consultants, Inc. (printed name of individual/employer contracting with the Town) hereby certify that I shall not discriminate against any individual because of such individual's race, color, religious creed, national origin, sex, sexual orientation, age or ancestry in fulfilling the terms of the contract that I propose to enter into with the Town of Brookline, and to which this Certificate is appended. By its signature on this Certification, the undersigned indicates it has reviewed Article 4.5 of the General Bylaws of the Town of Brookline and agrees to incorporate into an Agreement the necessary provisions related to non-discrimination.

Signed under the pains of penalties of perjury, on this 18 day of November, 2024;

Contractor

**Certificate of Compliance with Article 4.8
LIVING WAGE
of the Town of Brookline By-Laws**

I, Rocky Craley/Raftelis Financial Consultants, Inc. (printed name of individual/employer contracting with the Town) hereby certify that I shall pay the Living Wage in fulfilling the terms of the contract that I propose to enter into with the Town of Brookline, and to which this Certificate is appended. By its signature on this Certification, the undersigned indicates it has reviewed Article 4.8 of the General Bylaws of the Town of Brookline and agrees to incorporate into an Agreement the necessary provisions related to Living Wage.

Signed under the pains of penalties of perjury, on this 18 day of November, 2024;



Contractor

TOWN OF BROOKLINE, MASSACHUSETTS - PURCHASING DIVISION

333 WASHINGTON STREET, BROOKLINE, MA 02445

REQUEST FOR PROPOSALS

CLIMATE ACTION AND RESILIENCY PLAN

(To be submitted in Envelope A)

Marked as Follows: TECHNICAL PROPOSAL

CLIMATE ACTION AND RESILIENCY PLAN

Reference #P-25-04

Proposer's Name: Raftelis Financial Consultants, Inc.

Name of Individual or Company making Proposal

The following are to be attached to this Proposal form. (Responses should be detailed in accordance with the previous specific requests for information under "Technical Proposal" in the RFP document).

1. A synopsis of similar projects.
2. A synopsis of other significant contracts, with up to four examples, related to these types of services, preferably for municipal or other governmental agencies.
3. Résumés of key personnel.
4. A list with the name, address, telephone number, dates of service and a contact person's name and email address for a minimum of three comparable projects.
5. Number of consecutive years the proposer has been engaged in professional consulting services in the disciplines specified in this Request.
6. A completed Proposal Signature Form.

Note: Eight copies of the Proposal are to be submitted.



TOWN OF BROOKLINE

Massachusetts

DEPARTMENT OF FINANCE
PURCHASING DIVISION

333 Washington Street
Brookline, MA 02445
617-730-2195
Fax: 617-264-6446

GENERAL CONDITIONS

DAVID C GEANAKAKIS
Chief Procurement Officer

RICHARD SAVILLE
Procurement Officer

1. **AWARD DATE.** Award will be made within forty-five (45) days after the BID OPENING unless otherwise stated in the specifications or the time for award is extended by mutual consent of all parties concerned.

2. **EQUIVALENTS.** Where in the specifications, one certain kind, type, catalog number, brand or manufacturer of material is named, it shall be regarded as the required standard of quality. Where two or more are named, these are presumed to be equal and the contractor may select one of the items. If the bidder proposes to offer substitute items as an equal to those named in the specifications, he shall so indicate on the BID FORM the kind, type, catalog number, brand, or manufacturer of material that is offered as an equal, and shall submit data sheets and/or catalog cuts and otherwise describe wherein it differs from the base specifications in similar detail as the description of the component parts of the specified items. Substituted items must be capable of performing all the functions and/or operational features described or indicated in the specifications. Failure to indicate the description of any substitute item on the Bid Form will be interpreted to conclude that the bidder will furnish the specified item.

3. **DELIVERIES.** The contractor shall pay all freight and delivery charges. Unless otherwise stated, items must be delivered within forty-five (45) days of the notice of award. All deliveries must be made inside the building and to the appropriate storeroom as designated by the custodian. Sidewalk or tailgate deliveries will not be accepted. Town personnel are not required to assist in the deliveries and contractors are cautioned to notify their shippers that adequate assistance must be provided at the point of delivery. All items of furniture must be delivered inside the building, in place, set up ready for use. Deliveries are to be made between 8:30 A.M. and 4:00 P.M., Monday through Thursday, except on holidays. Friday deliveries shall be made between 8:30 A.M. and 12:00 Noon. All damaged items, or items which do not comply with specifications will not be accepted and title therefore will not vest to the Town of Brookline until such items are accepted by the receiving department. The contractor must replace, without further cost to the Town of Brookline, such damaged or non-complying items before payment will be made.

GENERAL CONDITIONS - PAGE 2

4. **LABELING.** All packages, cartons, or other containers must be clearly marked with (a) building and room designation; (b) description of contents or item number from specifications; (c) quantity; (d) Town of Brookline's purchase order number; and (e) Vendor's name and order number.

5. **GUARANTEES.** Unless otherwise stipulated in the specifications, furniture, equipment, and similar durable items shall be guaranteed by the contractor for a period of not less than one year from the date of acceptance by the receiving department. In addition, the manufacturer's guarantee shall be furnished. Any items provided under this contract which are or become defective during the guarantee period shall be replaced by the contractor free of charge with the understanding that all replacements shall carry the same guarantee as the original equipment. The contractor shall make any such replacement immediately upon receiving notice from the Chief Procurement Officer.

6. **RIGHT TO KNOW.** Any vendor who receives an order or orders resulting from this invitation agrees to submit a Material Safety Data Sheet (MSDS) for each toxic or hazardous substance or mixture containing such substance, pursuant to M.G.L. C111F SS8, 9 and 10 and the regulations contained in 441 CMR SS21.06 when deliveries are made. The vendor agrees to deliver all containers properly labeled pursuant to M.G.L. C111F S7 and the regulations contained in 441 CMR S21.05. Failure to submit an MSDS and/or label on each container will place the vendor in noncompliance with the contract. Failure to furnish MSDSs and/or labels on each container may result in civil or criminal penalties, including bid debarment and action to prevent the vendor from selling said substances, or mixtures containing such substances within the Commonwealth. All vendors furnishing substances or mixtures subject to Chapter 111F of M.G.L. are cautioned to obtain and read the law and rules and regulations referenced above.

FAILURE TO COMPLY WITH THESE REQUIREMENTS COULD RESULT IN THE CANCELLATION OF YOUR CONTRACT.

TOWN OF BROOKLINE, MASSACHUSETTS - PURCHASING DIVISION
333 WASHINGTON STREET, BROOKLINE, MA 02445

REQUEST FOR PROPOSALS

**CLIMATE ACTION AND RESILIENCY PLAN
TECHNICAL PROPOSAL**

(To be submitted in Envelope A)

PROPOSAL SIGNATURE FORM

The undersigned, hereafter called the Proposer, having fully familiarized him/herself with all of the Proposer documents, hereby agrees and declares:

1. That prices inserted cover all services, labor, materials, transportation, insurance, and all other necessary expenses to fulfill the conditions of the Contract within the time stated.
2. That if a substitute manufacturer's name or model number is not inserted by the Proposer in the appropriate location, it is understood that the Proposer will furnish only the specified item, and no substitute will be accepted.
3. Pursuant to M.G.L. Chapter 62C, Section 49A, the Proposer hereby certifies that the Proposer has filed all state tax returns and paid all state taxes required under law.
4. The undersigned certifies under penalties of perjury that this Proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

The following items are to be completed by the Proposer:

Title of Proposal Climate Action and Resiliency Plan


Guaranteed Date of Completion November 2025 estimated (based on the timeline listed in the RFP)

Company Name Raftelis Financial Consultants, Inc.

Company Address 24 Superior Drive, Suite 107, Natick, MA 01760

Social Security or Federal Identification Number 20-1054069

Firm is: A Corporation X A Partnership _____ Individually Owned _____

Signature of Company Official 

Telephone Number 704.771.3998

Fax Number 828.484.2442

Email Address rcraley@raftelis.com

Prompt Payment Discount (if applicable): N/A % _____ Days, Net 30 Days