



CITY OF SAN FERNANDO
CITY COUNCIL

MEETING AGENDA
SPECIAL MEETING – 5:30 PM TO 8:30 PM
MONDAY, MARCH 23, 2026

LAS PALMAS PARK – LEARNING CENTER
505 S. HUNTINGTON STREET
SAN FERNANDO, CA 91340

In accordance with the Americans with Disabilities Act of 1990, if you require a disability-related modification/accommodation to attend or participate in this meeting, including in-person translation services, or other services please call the City Clerk Department at (818) 898-1204 or email at cityclerk@sanfernando.gov at least 2 business days prior to the meeting.

SPECIAL MEETING - PUBLIC PARTICIPATION OPTIONS

SUBMIT PUBLIC COMMENT IN PERSON

Members of the public may provide comments in person during the Public Comments section of the Agenda by submitting a comment card to the City Clerk.

SUBMIT PUBLIC COMMENT VIA EMAIL

Members of the public may submit comments **by email** to cityclerk@sanfernando.gov no later than **12:00 p.m. the day of the meeting**, to ensure distribution to the City Council prior to consideration of the agenda. Comments received via email will be distributed to the City Council and made part of the official public record of the meeting.

CALL TO ORDER - SPECIAL MEETING 5:30 P.M.

ROLL CALL

APPROVAL OF SPECIAL MEETING AGENDA

DECORUM AND ORDER

The City Council, elected by the public, must be free to discuss issues confronting the City in an orderly environment. Members of the public attending City Council meetings shall observe the same rules of order and decorum applicable to the City Council (SF Procedural Manual). Any person making impertinent derogatory or slanderous remarks or who becomes boisterous while addressing the City Council or while attending the City Council meeting, may be removed from the room if the Presiding Officer so directs the sergeant-at-arms and such person may be barred from further audience before the City Council.

SAN FERNANDO CITY COUNCIL

Special Meeting Notice and Agenda – March 23, 2026

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PUBLIC STATEMENTS FOR SPECIAL MEETING

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ADMINISTRATIVE REPORTS

1) PRESENTATION AND WORKSHOP TO DEVELOP THE CITY’S FIVE-YEAR STRATEGIC PLAN FOR FISCAL YEARS 2027-2031

Recommend that the City Council receive a presentation and participate in a workshop to develop the City’s Five-Year Strategic Plan for Fiscal Years 2027-2031.

GENERAL CITY COUNCIL/BOARD MEMBER COMMENTS AND LIAISON UPDATES

ADJOURNMENT The meeting will adjourn to the Regular Meeting of April 6, 2026.

AFFIDAVIT OF POSTING

I hereby certify under penalty of perjury under the laws of the State of California that the foregoing agenda was posted on the City Hall bulletin board not less than 24 hours prior to the meeting.

Dated: _____ at: _____

Signed By: _____

Agendas and complete Agenda Packets (including staff reports and exhibits related to each item) are posted on the City’s `Internet website www.sanfernando.gov. These are also available for public reviewing prior to a meeting in the City Clerk Department. Any public writings distributed by the City Council to at least a majority of the Councilmembers regarding any item on this regular meeting agenda will also be made available at the City Clerk Department at City Hall located at 117 Macneil Street, San Fernando, CA, 91340 during normal business hours. In addition, the City may also post such documents on the City’s website at www.sanfernando.gov. In accordance with the Americans with Disabilities Act of 1990, if you require a disability-related modification/accommodation to attend or participate in this meeting, including auxiliary aids or services please call the City Clerk Department at (818) 898-1204 or cityclerk@sanfernando.gov at least 48 hours prior to the meeting.

Special Meeting

San Fernando City Council

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AGENDA REPORT

To: Mayor Joel Fajardo and Councilmembers

From: Kanika Kith, City Manager
By: Will Pettener, Assistant to the City Manager

Date: March 23, 2026

Subject: Presentation and Workshop to Develop the City’s Five-Year Strategic Plan for Fiscal Years 2027-2031

RECOMMENDATION:

It is recommended that the City Council receive a presentation and participate in a workshop to develop the City’s Five-Year Strategic Plan for Fiscal Years 2027-2031.

BACKGROUND:

1. On October 20, 2025, the City Council approved the release and circulation of a Request for Proposals (RFP) to prepare a Strategic Plan for the City for Fiscal Years 2027 – 2031 (Exhibit “A” to Attachment “A”).
2. On December 1, 2025, the City Council approved a Professional Services Agreement to Baker Tilly (Attachment “A” – Contract No. 2461) to guide the Strategic Planning process for the City for Fiscal Years 2027 – 2031, in an amount not to exceed \$63,000.

ANALYSIS:

A Strategic Plan is a guiding framework that defines a city’s long-term vision, priorities, and goals, along with the strategies and actions to achieve the vision. Serving as a roadmap for the future, it aligns the efforts of the City Council, staff, and community toward shared objectives while ensuring that decisions and resources are focused on the most meaningful outcomes. Covering multiple years, the plan is dynamic and regularly updated to reflect changing priorities and circumstances. A strategic plan promotes accountability, transparency, and efficiency in government operations, helping a city anticipate challenges, support sustainable growth, and enhance the quality of life for all residents.

Presentation and Workshop to Develop the City's Five-Year Strategic Plan for Fiscal Years 2027-2031

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Recognizing the importance of this effort, on December 1, 2025, the City Council awarded a contract to Baker Tilly to guide the development of the City's Strategic Plan. Through this partnership, the city will focus on several core elements that will shape the plan and its outcomes, including:

- Defining what the city aspires to be in the future and position it for long-term success.
- Organizing and prioritizing City initiatives and resources to achieve identified goals.
- Aligning the City Council, staff, residents, businesses, and community partners around a shared vision and strategic direction.
- Translating visionary concepts into realistic, measurable, and achievable outcomes.
- Inspiring ideas around economic growth, sustainability, fiscal stability, sense of place, and community identity.
- Charting an innovative and actionable path for San Fernando's future that sets clear priorities and maximizes opportunities for growth and resilience.

This effort represents a key opportunity for the City Council and the community to come together to define a shared vision and develop a focused five-year work plan for San Fernando. The Strategic Plan will guide how the City prioritizes resources, improves services, strengthens organizational effectiveness, and delivers meaningful results for the community it serves.

BUDGET IMPACT:

There is no budget impact associated with this item, as all costs have already been approved through the Fiscal Year 2025-26 Adopted budget.

CONCLUSION:

Staff recommends that the City Council receive a presentation and participate in a workshop to develop the City's Five-Year Strategic Plan for Fiscal Years 2027-2031.

ATTACHMENTS:

- A. Contract No. 2461 – Professional Services Agreement with Baker Tilly
Exhibit "A" to Attachment "A" Request for Proposal



2026

PROFESSIONAL SERVICES AGREEMENT

(Parties: Baker Tilly Advisory Group, LP and City of San Fernando)
(Engagement: Strategic Plan Consulting Services)

THIS PROFESSIONAL SERVICES AGREEMENT (hereinafter, "Agreement") is made and entered into this 1st day of December, 2025 (hereinafter, the "Effective Date") by and between the CITY OF SAN FERNANDO, a municipal corporation (hereinafter, "CITY") and BAKER TILLY ADVISORY GROUP, LP (hereinafter, "CONSULTANT"). For the purposes of this Agreement, CITY and CONSULTANT may be referred to collectively by the capitalized term "Parties." The capitalized term "Party" may refer to CITY or CONSULTANT interchangeably, as appropriate.

RECITALS

WHEREAS, CITY requires consulting services to lead the development of a new strategic plan for the City of San Fernando covering Fiscal Years 2027 through 2031, including a complete report and presentation to City Council and implementation support for staff following the approval of the plan; and

WHEREAS, CITY staff has determined that CONSULTANT possesses the experience, skills and training necessary to competently provide such tasks and services to CITY; and

WHEREAS, that the execution of this Agreement was approved by the San Fernando City Council at its Regular Meeting of December 1, 2025, under Agenda Item No. 5; and

NOW, THEREFORE, for and in consideration of the mutual covenants and conditions herein contained, CITY and CONSULTANT agree as follows:

I.

ENGAGEMENT TERMS

1.1 SCOPE OF WORK: Subject to the terms and conditions of this Agreement, CONSULTANT agrees to provide the tasks and services described in that certain Request for Proposals of CITY entitled "STRATEGIC PLAN CONSULTING SERVICES" (hereinafter, "CITY RFP") and the written proposal of CONSULTANT entitled "PROPOSAL FOR STRATEGIC PLAN CONSULTING SERVICES" (hereinafter, the "CONSULTANT Proposal"). The CITY RFP and the CONSULTANT Proposal are attached and incorporated hereto as **Exhibit "A"** and **"B"**, respectively. The term "Scope of Work" shall be a collective reference to the CITY RFP and the CONSULTANT Proposal. The capitalized term "Work" shall be a collective reference to all the various services and tasks referenced in the Scope of Work. In the event of any conflict or inconsistency between the provisions of the document entitled CITY RFP and the provisions of the document entitled CONSULTANT Proposal, the

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requirements of the document entitled CITY RFP shall govern and control but only to the extent of the conflict or inconsistency and no further. In the event of any conflict or inconsistency between the provisions of the Scope of Work and the provisions of this Agreement to which the Scope of Work is attached, the provisions of this Agreement shall govern and control.

1.2 PROSECUTION OF WORK:

- A. Time is of the essence for this Agreement and each and every provision contained herein. The Work shall be commenced within three (3) calendar days of CITY's issuance of a written notice to proceed ("Notice to Proceed"). CONSULTANT shall complete the various tasks identified in the Scope of Work within the timeframes set forth in the Scope of Work and shall complete all of the Work by or before July 31, 2026 (the "Completion Date"). CONSULTANT may submit a written request for additional time to complete the Work, which request must be submitted to the CITY no later than fifteen (15) calendar days prior to the Completion Date or any extended Completion Date granted by CITY. The written request for additional time must identify (i) what specific tasks or services remain to be completed by CONSULTANT in order to complete the Work; (ii) how much additional time CONSULTANT requires; (iii) identification of the circumstances that have caused the need for additional time, according to CONSULTANT, including, if applicable, identification of any tasks that must be completed by CITY as prerequisite to CONSULTANT being able to complete any other service or task; and (iv) what proactive steps CONSULTANT has taken up to the date of the request to mitigate the need for additional time, including, if applicable, any effort on the part of CONSULTANT to alert CITY of the need to provide information or complete certain tasks to be performed by CITY. CITY in its sole and absolute discretion may grant, deny, or conditionally grant a request for additional time, provided that no individual grant of additional time may exceed a maximum of fifteen (15) calendar days.
- B. CONSULTANT shall cooperate with CITY and in no manner interfere with the work of CITY, its employees or other consultants, contractors, or agents.
- C. CONSULTANT shall not claim or be entitled to receive any compensation or damage because of the failure of CONSULTANT, or its subconsultants, to have related services or tasks completed in a timely manner.
- D. CONSULTANT shall not claim or be entitled to receive any compensation or damage because of the failure of CONSULTANT, or its subconsultants, to have related services or tasks completed in a timely manner.
- E. CONSULTANT shall at all times enforce strict discipline and good order among CONSULTANT's employees.

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- F. CONSULTANT, at its sole expense, shall pay all sales, consumer, use or other similar taxes required by law.
- 1.3 **COMPENSATION:** CONSULTANT shall perform the Work in accordance with the proposed rate outlined in the RFP submission, which is attached and incorporated hereto as **Exhibit "B"**. The foregoing notwithstanding, CONSULTANT's total compensation for the performance of all Work contemplated under this Agreement, may not exceed the aggregate sum of **SIXTY-THREE THOUSAND DOLLARS (\$63,000)** (hereinafter, the "Not-to-Exceed Sum") during the Term of this Agreement, unless such added expenditure is first approved by the City Council. In the event CONSULTANT's charges are projected to exceed the Aggregate Not-to-Exceed Sum prior to the expiration of this Agreement, CITY may suspend CONSULTANT's performance pending CITY approval of any anticipated expenditures in excess of the Aggregate Not-to-Exceed Sum or any other CITY approved amendment to the compensation terms of this Agreement.
- 1.4 **PAYMENT OF COMPENSATION:** The Not-to-Exceed Sum will be paid to CONSULTANT in monthly increments as the Work are completed. Following the conclusion of each calendar month, CONSULTANT will submit to CITY an itemized invoice indicating the services performed and tasks completed during the recently concluded calendar month, including services and tasks performed and the reimbursable out-of-pocket expenses incurred. If the amount of CONSULTANT's monthly compensation is a function of hours worked by CONSULTANT's personnel, the invoice should indicate the number of hours worked in the recently concluded calendar month, the persons responsible for performing the Services, the rate of compensation at which such services and tasks were performed, the subtotal for each task and service performed and a grand total for all services performed. Within thirty (30) calendar days of receipt of each invoice, CITY will notify CONSULTANT in writing of any disputed amounts included in the invoice. Within forty-five (45) calendar days of receipt of each invoice, CITY will pay all undisputed amounts included on the invoice. CITY will not withhold applicable taxes or other authorized deductions from payments made to CONSULTANT.
- 1.5 **ACCOUNTING RECORDS:** CONSULTANT will maintain complete and accurate records with respect to all matters covered under this Agreement for a period of three (3) years after the expiration or termination of this Agreement. CITY will have the right to access and examine records relating to the fees and expenses charged under this Agreement, without charge, during normal business hours. CITY will further have the right to audit records relating to the fees and expenses charged under this Agreement at a time and place mutually agreed by the Parties, provided such access shall not include access to CONSULTANT'S facilities, or systems housing confidential information of CONSULTANT or CONSULTANT'S other clients.
- 1.6 **ABANDONMENT BY CONSULTANT:** In the event CONSULTANT ceases to perform the Work agreed to under this Agreement or otherwise abandons the undertaking contemplated herein prior to the expiration of this Agreement or prior to completion of any or all tasks set forth in the Scope of Services, CONSULTANT will deliver to CITY

immediately and without delay, final Documents and Data (as defined in Section 6.1) or other final work product prepared or obtained by CONSULTANT in the performance of this Agreement. Furthermore, CONSULTANT will only be compensated for the reasonable value of the services, tasks and other Work performed up to the time of cessation or abandonment.

II.

PERFORMANCE OF AGREEMENT

- 2.1 CITY'S REPRESENTATIVE: The CITY hereby designates Will Pettener, Assistant to the City Manager, (hereinafter, the "City Representative") to act as its representative for the performance of this Agreement. The City Representative or the City Representative's designee will act on behalf of the CITY for all purposes under this Agreement. CONSULTANT will not accept directions or orders from any person other than the City Representative or the City Representative's designee.
- 2.2 CONSULTANT REPRESENTATIVE: CONSULTANT hereby designates Annie Rose Favreau, Director, to act as its representative for the performance of this Agreement (hereinafter, "Consultant Representative"). Consultant Representative will have full authority to represent and act on behalf of the CONSULTANT for all purposes under this Agreement. Consultant Representative or Consultant Representative's designee will supervise and direct the performance of the Work, using his/her best skill and attention, and will be responsible for all means, methods, techniques, sequences, and procedures and for the satisfactory coordination of all Work under this Agreement. Notice to the Consultant Representative will constitute notice to CONSULTANT.
- 2.3 COORDINATION OF WORK; CONFORMANCE WITH REQUIREMENTS: CONSULTANT agrees to work closely with CITY staff in the performance of the Services and this Agreement and will be available to CITY staff and the City Representative at reasonable times. All work prepared by CONSULTANT will be subject to inspection and approval by City Representative or his or her designees.
- 2.4 STANDARD OF CARE; PERFORMANCE OF EMPLOYEES: CONSULTANT represents, acknowledges, and agrees to the following:
- A. CONSULTANT will perform all Work skillfully, consistent with and adhering to its professional standard of care, that is, the degree of care and skill ordinarily exercised by members of the same profession currently practicing at the same time and in the same or similar locality;
 - B. CONSULTANT shall at all times employ such force, plant, materials, and tools as will be sufficient in the opinion of the CITY to perform the Services within the time limits established, and as provided herein. It is understood and agreed that said tools, equipment, apparatus, facilities, labor, and material shall be furnished and said Work performed and completed as required by the Agreement, and subject to the approval of the CITY's authorized representative;

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- C. CONSULTANT will perform all Work in a manner reasonably satisfactory to the CITY;
- D. CONSULTANT will comply with all federal, state, and local laws and regulations applicable to the services, including the conflict of interest provisions of Government Code §1090 and the Political Reform Act (Government Code §§81000 *et seq.*) CONSULTANT shall be liable for all violations of such laws and regulations in connection CONSULTANT's performance of the Services. If CONSULTANT performs any work knowing it to be contrary to such laws, rules and regulations, CONSULTANT shall be solely responsible for all costs arising therefrom;
- E. CONSULTANT understands the nature and scope of the Work to be performed under this Agreement as well as any and all schedules of performance;
- F. All of CONSULTANT's employees and agents possess sufficient skill, knowledge, training, and experience to perform those services and tasks assigned to them by CONSULTANT; and
- G. All of CONSULTANT's employees and agents (including, but not limited to, subcontractors and subconsultants) possess all licenses, permits, certificates, qualifications, and approvals of whatever nature that are legally required to perform the tasks and services contemplated under this Agreement and all such licenses, permits, certificates, qualifications, and approvals will be maintained throughout the term of this Agreement and made available to CITY for copying and inspection.

The Parties acknowledge and agree that CONSULTANT will perform, at CONSULTANT's own cost and expense and without any reimbursement from CITY, any services necessary to correct any errors or omissions caused by CONSULTANT's failure to comply with the standard of care set forth under this Section or by any like failure on the part of CONSULTANT's employees, agents, contractors, subcontractors and subconsultants. Such effort by CONSULTANT to correct any errors or omissions will be commenced immediately upon their discovery by either Party and, notwithstanding Section 5.2(B), will be completed within seven (7) calendars days from the date of discovery or such other extended period of time authorized by the City Representative in writing and in her sole and absolute discretion. The Parties acknowledge and agree that CITY's acceptance of any work performed by CONSULTANT or on CONSULTANT's behalf will not constitute a release of any deficiency or delay in performance. The Parties further acknowledge, understand, and agree that CITY has relied upon the foregoing representations of CONSULTANT, including but not limited to the representation that CONSULTANT possesses the skills, training, knowledge, and experience necessary to perform the Work under the standard of care as articulated under section 2.4(A).

2.5 ASSIGNMENT: The skills, training, knowledge, and experience of CONSULTANT are material to CITY's willingness to enter into this Agreement. Accordingly, CITY has an interest in the qualifications and capabilities of the person(s) who will perform the services and tasks to be undertaken by CONSULTANT or on behalf of CONSULTANT in the

performance of this Agreement. In recognition of this interest, CONSULTANT agrees that it will not assign or transfer, either directly or indirectly or by operation of law, this Agreement, or the performance of any of CONSULTANT's duties or obligations under this Agreement, without the prior written consent of the CITY. In the absence of CITY's prior written consent, any attempted assignment or transfer will be ineffective, null and void and will constitute a material breach of this Agreement.

2.6 SUBSTITUTION OF KEY PERSONNEL: CONSULTANT has represented to CITY that certain key personnel will perform and coordinate the Work under this Agreement. Should one or more of such personnel become unavailable, CONSULTANT may substitute other personnel of at least equal competence upon written approval of CITY. In the event that CITY and CONSULTANT cannot agree as to the substitution of key personnel, CITY shall be entitled to terminate this Agreement for cause. As discussed below, any personnel who fail or refuse to perform the Work in a manner acceptable to the CITY, or who are determined by the CITY to be uncooperative, incompetent, a threat to the adequate or timely completion of the Project or a threat to the safety of persons or property, shall be promptly removed from the Project by the CONSULTANT at the request of the CITY. The key personnel for performance of this Agreement are as follows: Annie Rose Favreau, Director and Colleen Rozillis, Managing Principal.

2.7 CONTROL AND PAYMENT OF SUBORDINATES; INDEPENDENT CONTRACTOR: The Work will be performed by CONSULTANT or under CONSULTANT's strict supervision. CONSULTANT will determine the means, methods, and details of performing the Work subject to the requirements of this Agreement. CITY retains CONSULTANT on an independent contractor basis and not as an employee. CONSULTANT reserves the right to perform similar or different services for other principals during the term of this Agreement, provided such work does not unduly interfere with CONSULTANT's competent and timely performance of the Work contemplated under this Agreement and provided the performance of such services and tasks does not result in the unauthorized disclosure of CITY's confidential or proprietary information. Any additional personnel performing the Work under this Agreement on behalf of CONSULTANT are not employees of CITY and will at all times be under CONSULTANT's exclusive direction and control. CONSULTANT will pay all wages, salaries and other amounts due such personnel and will assume responsibility for all benefits, payroll taxes, Social Security and Medicare payments and the like. CONSULTANT will be responsible for all reports and obligations respecting such additional personnel, including, but not limited to: Social Security taxes, income tax withholding, unemployment insurance, disability insurance, workers' compensation insurance and the like. Notwithstanding any other CITY, state, or federal policy, rule, regulation, law, or ordinance to the contrary, CONSULTANT and any of its employees, agents, and subcontractors performing the Work under this Agreement shall not qualify for or become entitled to, and hereby agree to waive any and all claims to, any compensation, benefit, or any incident of employment by CITY, including but not limited to eligibility to enroll in the California Public Employees Retirement System (PERS) as an employee of CITY and entitlement to any contribution to be paid by CITY for employer contributions and/or employee contributions for PERS benefits.

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- 2.8 **REMOVAL OF EMPLOYEES OR AGENTS:** If any of CONSULTANT’s officers, employees, agents, contractors, subcontractors or subconsultants is determined by the City Representative to be uncooperative, incompetent, a threat to the adequate or timely performance of the tasks assigned to CONSULTANT, a threat to persons or property, or if any of CONSULTANT’s officers, employees, agents, contractors, subcontractors or subconsultants fail or refuse to perform the Work in a manner acceptable to the CITY, such officer, employee, agent, contractor, subcontractor or subconsultant will be promptly removed by CONSULTANT and will not be reassigned to perform any of the Work.
- 2.9 **COMPLIANCE WITH LAWS:** CONSULTANT will keep itself informed of and in compliance with all applicable federal, state, or local laws to the extent such laws control or otherwise govern the performance of the Work. CONSULTANT’s compliance with applicable laws will include, without limitation, compliance with all applicable Cal/OSHA requirements and applicable regulations of the U.S. Department of Housing and Urbanization.
- 2.10 **NON-DISCRIMINATION:** CONSULTANT represents that it is an equal opportunity employer, and it shall not discriminate against any subconsultant, employee or applicant for employment because of race, religion, color, national origin, handicap, ancestry, sex, or age. Such non-discrimination shall include, but not be limited to, all activities related to initial employment, upgrading, demotion, transfer, recruitment or recruitment advertising, layoff, or termination.
- 2.11 **INDEPENDENT CONTRACTOR STATUS:** The Parties acknowledge, understand, and agree that CONSULTANT and all persons retained or employed by CONSULTANT are, and will at all times remain, wholly independent contractors and are not officials, officers, employees, departments, or subdivisions of CITY. CONSULTANT will be solely responsible for the negligent acts and/or omissions of its employees, agents, contractors, subcontractors and subconsultants. CONSULTANT and all persons retained or employed by CONSULTANT will have no authority, express or implied, to bind CITY in any manner, nor to incur any obligation, debt, or liability of any kind on behalf of, or against, CITY, whether by contract or otherwise, unless such authority is expressly conferred to CONSULTANT under this Agreement or is otherwise expressly conferred by CITY in writing.

III.

INSURANCE

- 3.1 **DUTY TO PROCURE AND MAINTAIN INSURANCE:** Before commencing the Work, CONSULTANT will procure and maintain policies of insurance that meet the requirements and specifications set forth under this Article. CONSULTANT will procure and maintain the following insurance coverage, at its own expense:
- A. **Commercial General Liability Insurance:** CONSULTANT will procure and maintain Commercial General Liability Insurance (“CGL Coverage”) as broad as Insurance Services Office Commercial General Liability coverage (occurrence Form CG 0001) or

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- its equivalent. Such CGL Coverage will have minimum limits of no less than One Million Dollars (\$1,000,000.00) per occurrence and Two Million Dollars (\$2,000,000.00) in the general aggregate for bodily injury, personal injury, property damage, operations, products and completed operations, and contractual liability.
- B. Automobile Liability Insurance: For any non-owned, or hired vehicles used in connection with the performance of this Agreement, CONSULTANT will procure and maintain Automobile Liability Insurance covering Automobile Liability, Code 1 (any auto). Such Automobile Liability Insurance will have minimum limits of no less than One Million Dollars (\$1,000,000.00) per accident for bodily injury and property damage.
- C. Workers' Compensation Insurance/ Employer's Liability Insurance: A policy of workers' compensation insurance in such amount as will fully comply with the laws of the State of California and sufficient to meet CONTRACTOR's statutory obligations to provide benefits for their contractual and statutory employees for claims relating to any injuries or occupational diseases occurring to any worker employed by or any persons retained by CONSULTANT in the course of carrying out the Work contemplated in this Agreement.
- D. Errors & Omissions Insurance: For the full term of this Agreement and for a period of three (3) years thereafter, CONSULTANT will procure and maintain Errors and Omissions Liability Insurance appropriate to CONSULTANT's profession. Such coverage will have minimum limits of no less than Two Million Dollars (\$2,000,000.00) per claim.
- 3.2 ADDITIONAL INSURED REQUIREMENTS: The CGL Coverage and the Automobile Liability Insurance will name the CITY and CITY's elected and appointed officials, officers, employees, agents, and volunteers as additional insureds via blanket endorsement.
- 3.3 REQUIRED CARRIER RATING: All varieties of insurance required under this Agreement will be procured from insurers admitted in the State of California and authorized to issue policies directly to California insureds. Except as otherwise provided elsewhere under this Article, all required insurance will be procured from insurers who, according to the latest edition of the Best's Insurance Guide, have an A.M. Best's rating of no less than A-:VII. CITY may also accept policies procured by insurance carriers with a Standard & Poor's rating of no less than BBB according to the latest published edition the Standard & Poor's rating guide. As to Workers' Compensation Insurance/ Employer's Liability Insurance, the CITY Representative is authorized to authorize lower ratings than those set forth in this Section.
- 3.4 PRIMACY OF CONSULTANT'S INSURANCE: All policies of insurance provided by CONSULTANT will be primary to any coverage available to CITY or CITY's elected or appointed officials, officers, employees, agents, or volunteers. Any insurance or self-insurance maintained by CITY or CITY's elected or appointed officials, officers, employees, agents, or volunteers will be in excess of CONSULTANT's insurance and will not contribute with it.

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- 3.5 WAIVER OF SUBROGATION: The CGL Coverage, Worker Compensation and the Automobile Liability insurance coverage provided pursuant to this Agreement will not prohibit CONSULTANT or CONSULTANT's officers, employees, agents, subcontractors or subconsultants from waiving the right of subrogation prior to a loss. CONSULTANT hereby waives all rights of subrogation against CITY, its officials, officers, employees, agents, and volunteers.
- 3.6 VERIFICATION OF COVERAGE: CONSULTANT acknowledges, understands, and agrees, that CITY's ability to verify the procurement and maintenance of the insurance required under this Article is a material consideration of this Agreement. Accordingly, CONSULTANT warrants, represents, and agrees that it will furnish CITY with certificates of insurance and endorsements evidencing the coverage required under this Article. **The certificates of insurance and endorsements for each insurance policy will be signed by a person authorized by that insurer to bind coverage on its behalf and will be on forms provided by the CITY if requested.** Before commencing the Work, CONSULTANT shall provide CITY with all certificates of insurance and endorsements referenced herein.
- 3.7 FAILURE TO MAINTAIN COVERAGE: In the event any policy of insurance required under this Agreement does not comply with these specifications or is canceled and not replaced immediately so as to avoid a lapse in the required coverage, CITY has the right to cancel this Agreement effective upon notice.
- 3.8 SPECIAL RISKS OR CIRCUMSTANCES: City reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances. Any amendment to the insurance requirements of this Article shall be memorialized and approved in the form of a written amendment to this Agreement, signed by the Parties. The requirement for written amendments, modifications or supplements cannot be waived and any attempted waiver will be void or invalid.

IV.

INDEMNIFICATION

- 4.1 To the fullest extent permitted by law, the parties agree to save, indemnify, defend, and hold harmless each other from any and all third-party liability, claims, suits, actions, arbitration proceedings, administrative proceedings, and regulatory proceedings, losses, expenses, or any injury or damage of any kind whatsoever, whether actual, alleged or threatened, attorney fees, court costs, and any other costs of any nature without restriction incurred in relation to, as a consequence of, or arising out of, bodily injury (including death) or damage to real or tangible property to the extent such claims are caused by any negligent act or omission of the other party in the performance of this Agreement, and attributable to the fault of the other. Following a determination of the percentage of fault and or liability by agreement between the Parties or a court of competent jurisdiction, the Party responsible for liability to the other will indemnify the other Party to this Agreement for the percentage of liability determined.

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- 4.2 CITY does not and shall not waive any rights that it may possess against CONSULTANT because of the acceptance by CITY, or the deposit with CITY, of any insurance policy or certificate required pursuant to this Agreement. This hold harmless and indemnification provision shall apply regardless of whether or not any insurance policies are determined to be applicable to the claim, demand, damage, liability, loss, cost, or expense.
- 4.3 This Article and all provisions contained herein (including but not limited to the duty to indemnify, defend, and hold free and harmless) shall survive the termination or normal expiration of this Agreement and is in addition to any other rights or remedies which the CITY may have at law or in equity.

V.
TERMINATION

5.1 TERMINATION WITHOUT CAUSE: Either Party may terminate this Agreement at any time for convenience and without cause by giving thirty (30) days prior written notice of Party's intent to terminate this Agreement which notice shall specify the effective date of such termination. Upon such termination for convenience, CONSULTANT will be compensated only for those services and tasks which have been performed by CONSULTANT up to the effective date of the termination. If this Agreement is terminated as provided herein, CITY may require CONSULTANT to provide all finalized Documents and Data, as defined in section 6.1 below. CONSULTANT will be required to provide such Documents and Data within fifteen (15) calendar days of CITY's written request. No actual or asserted breach of this Agreement on the part of CITY pursuant to Section 5.2, below, will operate to prohibit or otherwise restrict CITY's ability to terminate this Agreement for convenience as provided under this Section.

5.2 EVENTS OF DEFAULT; BREACH OF AGREEMENT:

- A. In the event either Party fails to perform any duty, obligation, service, or task set forth under this Agreement (or fails to timely perform or properly perform any such duty, obligation, service, or task set forth under this Agreement), an event of default (hereinafter, "Event of Default") will occur. For all Events of Default, the Party alleging an Event of Default will give written notice to the defaulting Party (hereinafter referred to as a "Default Notice") which will specify: (i) the nature of the Event of Default; (ii) the action required to cure the Event of Default; (iii) a date by which the Event of Default will be cured, which will not be less than the applicable cure period set forth under Sections 5.2B and 5.2C below or if a cure is not reasonably possible within the applicable cure period, to begin such cure and diligently prosecute such cure to completion. The Event of Default will constitute a breach of this Agreement if the defaulting Party fails to cure the Event of Default within the applicable cure period or any extended cure period allowed under this Agreement.
- B. CONSULTANT will cure the following Events of Defaults within the following time periods:

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- i. Within ten (10) business days of CITY's issuance of a Default Notice for any failure of CONSULTANT to timely provide CITY or CITY's employees or agents with any information and/or written reports, documentation, or work product which CONSULTANT is obligated to provide to CITY or CITY's employees or agents under this Agreement. Prior to the expiration of the 10-day cure period, CONSULTANT may submit a written request for additional time to cure the Event of Default upon a showing that CONSULTANT has commenced efforts to cure the Event of Default and that the Event of Default cannot be reasonably cured within the 10-day cure period. The foregoing notwithstanding, CITY will be under no obligation to grant additional time for the cure of an Event of Default under this Section 5.2B.i. that exceeds seven (7) calendar days from the end of the initial 10-day cure period; or
- ii. Within fourteen (14) calendar days of CITY's issuance of a Default Notice for any other Event of Default under this Agreement. Prior to the expiration of the 14-day cure period, CONSULTANT may submit a written request for additional time to cure the Event of Default upon a showing that CONSULTANT has commenced efforts to cure the Event of Default and that the Event of Default cannot be reasonably cured within the 14-day cure period. The foregoing notwithstanding, CITY will be under no obligation to grant additional time for the cure of an Event of Default under this Section 5.2B.ii that exceeds thirty (30) calendar days from the end of the initial 14-day cure period.

In addition to any other failure on the part of CONSULTANT to perform any duty, obligation, service or task set forth under this Agreement (or the failure to timely perform or properly perform any such duty, obligation, service or task), an Event of Default on the part of CONSULTANT will include, but will not be limited to the following: (i) CONSULTANT's refusal or failure to perform any of the services or tasks called for under the Scope of Work; (ii) CONSULTANT's failure to fulfill or perform its obligations under this Agreement within the specified time or if no time is specified, within a reasonable time; (iii) CONSULTANT's and/or its employees' disregard or violation of any federal, state, local law, rule, procedure or regulation; (iv) the initiation of proceedings under any bankruptcy, insolvency, receivership, reorganization, or similar legislation as relates to CONSULTANT, whether voluntary or involuntary; and/or (v) CITY's discovery that a statement representation or warranty by CONSULTANT relating to this Agreement is false, misleading or erroneous in any material respect.

- C. CITY will cure any Event of Default asserted by CONSULTANT within forty-five (45) calendar days of CONSULTANT's issuance of a Default Notice unless the Event of Default cannot reasonably be cured within the 45-day cure period. Prior to the expiration of the 45-day cure period, CITY may submit a written request for additional time to cure the Event of Default upon a showing that CITY has commenced its efforts to cure the Event of Default and that the Event of Default cannot be reasonably cured within the 45-day cure period. The foregoing notwithstanding, an Event of Default dealing with CITY's failure to timely pay any undisputed sums to CONSULTANT as provided under Section 1.5, above, will be cured by CITY within five (5) calendar days from the date of CONSULTANT's Default Notice to CITY.

- D. CITY, in its sole and absolute discretion, may also immediately suspend CONSULTANT's performance under this Agreement pending CONSULTANT's cure of any Event of Default by giving CONSULTANT written notice of CITY's intent to suspend CONSULTANT's performance (hereinafter, a "Suspension Notice"). CITY may issue the Suspension Notice at any time upon the occurrence of an Event of Default. Upon such suspension, CONSULTANT will be compensated only for those services and tasks which have been rendered by CONSULTANT to the reasonable satisfaction of CITY up to the effective date of the suspension. No actual or asserted breach of this Agreement on the part of CITY will operate to prohibit or otherwise restrict CITY's ability to suspend this Agreement as provided herein.
- E. No waiver of any Event of Default or breach under this Agreement will constitute a waiver of any other or subsequent Event of Default or breach. No waiver, benefit, privilege, or service voluntarily given or performed by a Party will give the other Party any contractual rights by custom, estoppel, or otherwise.
- F. The duties and obligations imposed under this Agreement and the rights and remedies available hereunder will be in addition to and not a limitation of any duties, obligations, rights, and remedies otherwise imposed or available by law. In addition to any other remedies available to CITY at law or under this Agreement in the event of any breach of this Agreement, CITY, in its sole and absolute discretion, may also pursue any one or more of the following remedies:
- i. Upon written notice to CONSULTANT, the CITY may immediately terminate this Agreement in whole or in part;
 - ii. Upon written notice to CONSULTANT, the CITY may extend the time of performance;
 - iii. The CITY may proceed by appropriate court action to enforce the terms of the Agreement to recover damages for CONSULTANT's breach of the Agreement or to terminate the Agreement; or
 - iv. The CITY may exercise any other available and lawful right or remedy.

Each Party will be liable for its own legal fees and other costs and expenses that a Party incurs upon a breach of this Agreement or in the Party's exercise of its remedies under this Agreement.

- G. In the event CITY is in breach of this Agreement, CONSULTANT's sole remedy will be the suspension or termination of this Agreement and/or the recovery of any unpaid sums lawfully owed to CONSULTANT under this Agreement for services performed.

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- 5.3 SCOPE OF WAIVER: No waiver of any default or breach under this Agreement will constitute a waiver of any other default or breach, whether of the same or other covenant, warranty, agreement, term, condition, duty, or requirement contained in this Agreement. No waiver, benefit, privilege, or service voluntarily given or performed by a Party will give the other Party any contractual rights by custom, estoppel, or otherwise.
- 5.4 SURVIVING ARTICLES, SECTIONS AND PROVISIONS: The termination of this Agreement pursuant to any provision of this Article or by normal expiration of its term or any extension thereto will not operate to terminate any Article, Section or provision contained herein which provides that it will survive the termination or normal expiration of this Agreement.

VI.

MISCELLANEOUS PROVISIONS

- 6.1 DOCUMENTS & DATA; LICENSING OF INTELLECTUAL PROPERTY: All Documents and Data will be and remain the property of CITY without restriction or limitation upon their use or dissemination by CITY. For purposes of this Agreement, the term “Documents and Data” means and includes all final reports or completed deliverables provided by the CONSULTANT and delivered to the CITY in the performance of this Agreement and fixed in any tangible medium of expression, including but not limited to Documents and Data stored digitally, magnetically and/or electronically, but excluding any CONSULTANT Materials (defined below) contained or embodied therein. This Agreement creates, at no cost to CITY, a perpetual license for CITY to copy, use, reuse, disseminate and/or retain any and all copyrights, designs, and other intellectual property embodied in all Documents and Data. However, CITY may not alter or amend any Documents or Data issued under CONSULTANT’s name and CONSULTANT may retain a copy of Documents or Data for archival purposes. CONSULTANT will require all subcontractors and subconsultants working on behalf of CONSULTANT in the performance of this Agreement to agree in writing that CITY will be granted the same right to copy, use, reuse, disseminate and retain Documents and Data prepared or assembled by any subcontractor or subconsultant as applies to Documents and Data prepared by CONSULTANT in the performance of this Agreement.

CONSULTANT shall own: (i) its working papers and any internal engagement documentation; and (ii) any general skills, know-how, expertise, ideas, concepts, methods, techniques, processes, software, materials, or other intellectual property which may have been discovered, created, received, or developed by CONSULTANT either prior to or as a result of providing services under this Agreement (collectively, “CONSULTANT Materials”). CITY shall have a non-exclusive, non-transferable license to use CONSULTANT Materials for its own internal use and only for the purposes for which they are delivered to the extent they form part of Documents and Data. Notwithstanding anything to the contrary in this Agreement, CONSULTANT and its personnel are free to use and employ their general skills, know-how, and expertise, and to use, disclose, and employ any generalized ideas, concepts, know-how, methods, techniques or skills gained

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or learned during the course of this Agreement so long as they acquire and apply such information without any unauthorized use or disclosure of confidential or proprietary information of CITY.

6.2 **CONFIDENTIALITY**: All data, documents, discussion, or other information developed or received by CONSULTANT or provided for performance of this Agreement are deemed confidential and will not be disclosed by CONSULTANT without prior written consent by CITY. CITY will grant such consent of disclosure as legally required. Upon request, all CITY data will be returned to CITY upon the termination or expiration of this Agreement; provided, however, that CONSULTANT shall own its workpapers and shall be permitted to retain Confidential Information to the extent incorporated or embodied in its workpapers, and it shall continue to maintain the confidentiality of such Confidential Information until the workpapers are destroyed. Neither Party will use the other Party's name or insignia, photographs, or any publicity pertaining to the Work in any magazine, trade paper, newspaper, television or radio production or other similar medium without the prior written consent of the other Party.

6.3 **DATA PRIVACY AND SECURITY**: To the extent the services require CONSULTANT to receive personal data or personal information from the CITY, CONSULTANT may process, and engage subcontractors to assist with processing, any personal data or personal information, as those terms are defined in applicable privacy laws, and such processing shall be in accordance with the requirements of the applicable privacy laws relevant to the processing in providing services hereunder, including services performed to meet the business purposes of the CITY, such as CONSULTANT's tax, advisory and other consulting services. Applicable privacy laws may include any local, state, federal or international laws, standards, guidelines, policies or regulations governing the collection, use, disclosure, sharing or other processing of personal data or personal information with which CONSULTANT or its clients must comply. Such privacy laws may include (i) the California Consumer Privacy Act of 2018 (CCPA); and/or (ii) other laws regulating marketing communications, requiring security breach notification, imposing minimum security requirements, requiring the secure disposal of records, and other similar requirements applicable to the processing of personal data or personal information. CONSULTANT is acting as a Service Provider/Data Processor, as those terms are defined respectively under the CCPA/GDPR, in relation to CITY personal data and personal information. As a Service Provider/Data Processor processing personal data or personal information on behalf of CITY, CONSULTANT shall, unless otherwise permitted by applicable privacy law, (a) follow CITY instructions; (b) not sell personal data or personal information collected from the CITY or share the personal data or personal information for purposes of targeted advertising; (c) process personal data or personal information solely for purposes related to the CITY's engagement and not for CONSULTANT's own commercial purposes; and (d) cooperate with and provide reasonable assistance to CITY to ensure compliance with applicable privacy laws. CITY represents and warrants it has all necessary authority (including any legally required consent from individuals) to transfer such information and authorize CONSULTANT to process such information in connection with the Services described herein. County further understands that CONSULTANT, Moss

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Adams Advisory Group, LP, and Baker Tilly US, LLP and their affiliated entities (collectively, the "CONSULTANT Firms") may co process CITY data as necessary to perform the services, pursuant to the alternative practice structure in place among the entities, and by executing this Agreement, CITY hereby consents to the sharing of CITY data, CITY files, workpapers and work product with such CONSULTANT Firms. Baker Tilly Advisory Group, LP maintains custody of client files for these entities. The CONSULTANT Firms are bound by the same confidentiality obligations as CONSULTANT. CONSULTANT is responsible for notifying CITY if CONSULTANT becomes aware that it can no longer comply with any applicable privacy law and, upon such notice, shall permit CITY to take reasonable and appropriate steps to remediate personal data or personal information processing. CITY agrees that the CONSULTANT Firms have the right to utilize CITY data to improve internal processes and procedures and to generate aggregated/de identified data from the data provided by CITY to be used for the CONSULTANT Firms' business purposes and with the outputs owned by the CONSULTANT Firms. For clarity, the CONSULTANT Firms will only disclose aggregated/de identified data in a form that does not identify CITY, CITY employees, or any other individual or business entity and that is stripped of all persistent identifiers. CITY is not responsible for the CONSULTANT Firms' use of aggregated/de identified data.

6.4 **FALSE CLAIMS ACT:** CONSULTANT warrants and represents that neither CONSULTANT nor any person who is an officer of, in a managing position with, or has an ownership interest in CONSULTANT has been determined by a court or tribunal of competent jurisdiction to have violated the False Claims Act, 31 U.S.C., §§3789 *et seq.* and the California False Claims Act, Government Code §§12650 *et seq.*

6.5 **NOTICES:** All notices permitted or required under this Agreement will be given to the respective Parties at the following addresses, or at such other address as the respective Parties may provide in writing for this purpose:

CONSULTANT:

Baker Tilly Advisory Group, LP
21700 Oxnard Street Suite 300
Woodland Hills, CA 91367
Attn: Annie Rose Favreau
Phone: 206-302-6795
Email: AnnieRose.Favreau@bakertilly.com

CITY:

City of San Fernando
City Manager's Office
117 Macneil Street
San Fernando, CA 91324
Attn: Kanika Kith
Phone: 818-898-1202

Such notices will be deemed effective when personally delivered or successfully transmitted by facsimile as evidenced by a fax confirmation slip or when mailed, forty-eight (48) hours after deposit with the United States Postal Service, first class postage prepaid and addressed to the Party at its applicable address.

6.6 **COOPERATION; FURTHER ACTS:** The Parties will fully cooperate with one another and will take any additional acts or sign any additional documents as are reasonably necessary, appropriate, or convenient to achieve the purposes of this Agreement.

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- 6.7 SUBCONTRACTING: CONSULTANT will not subcontract any portion of the Work required by this Agreement, except as expressly stated herein, without the prior written approval of CITY. Subcontracts (including without limitation subcontracts with subconsultants), if any, will contain a provision making them subject to all provisions stipulated in this Agreement, including provisions relating to insurance requirements and indemnification.
- 6.8 CITY'S RIGHT TO EMPLOY OTHER CONSULTANTS: CITY reserves the right to employ other independent contractors in connection with the various projects worked upon by CONSULTANT.
- 6.9 CONFLICTS OF INTEREST:
- A. CONSULTANT represents and maintains that it has not employed nor retained any company or person, other than a *bona fide* employee working solely for CONSULTANT, to solicit or secure this Agreement. Further, CONSULTANT represents that it has not paid, nor has it agreed to pay, any company or person, other than a *bona fide* employee working solely for CONSULTANT, any fee, commission, percentage, brokerage fee, gift, or other consideration contingent upon or resulting from the award or making of this Agreement. For breach or violation of this representation, CITY will have the right to rescind this Agreement without liability. For the term of this Agreement, no member, officer, or employee of CITY, during the term of his or her service with CITY, will have any direct interest in this Agreement, or obtain any present or anticipated material benefit arising therefrom.
 - B. CONSULTANT may serve other clients, but none whose activities within the corporate limits of CITY or whose business, regardless of location, would place CONSULTANT in a "conflict of interest," as that term is defined in the Political Reform Act, codified at California Government Code §81000 *et seq.*
 - C. CONSULTANT shall not employ any official or employee of the CITY during the Term of this Agreement or any extension term. No officer or employee of CITY shall have any financial interest in this Agreement that would violate Government Code §§1090 *et seq.* CONSULTANT represents that no owner, principal, partner, officer, or employee of CONSULTANT is or has been an official, officer, employee, agent, or appointee of the CITY within the twelve-month period of time immediately preceding the Effective Date. If an owner, principal, partner, officer, employee, agent, or appointee of CONSULTANT was an official, officer, employee, agent, or appointee of the CITY within the twelve-month period immediately preceding the Effective Date, CONSULTANT represents that any such individuals did not participate in any manner in the forming of this Agreement. CONTRACTOR understands that, if this Agreement is made in violation of Government Code §1090 *et seq.*, the entire Agreement is void and CONSULTANT will not be entitled to any compensation for services performed pursuant to this Agreement, including reimbursement of expenses, and CONSULTANT will be required to reimburse the CITY for any sums paid to CONSULTANT. CONSULTANT understands that, in addition to the foregoing, it may be subject to criminal prosecution for a violation of Government Code §1090.

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- 6.10 TIME IS OF THE ESSENCE: Time is of the essence for each and every provision of this Agreement.
- 6.11 GOVERNING LAW AND VENUE: This Agreement shall be interpreted and governed according to the laws of the State of California. In the event of litigation between the Parties, venue, without exception, will be in the Los Angeles County Superior Court of the State of California. If, and only if, applicable law requires that all or part of any such litigation be tried exclusively in federal court, venue, without exception, will be in the Central District of California located in the City of Los Angeles, California.
- 6.12 ATTORNEYS' FEES: If either Party commences an action against the other Party, legal, administrative, or otherwise, arising out of or in connection with this Agreement, each Party shall bear their own attorneys' fees and all other costs of such action.
- 6.13 SUCCESSORS AND ASSIGNS: This Agreement will be binding on the successors and assigns of the Parties.
- 6.14 NO THIRD-PARTY BENEFIT: There are no intended third-party beneficiaries of any right or obligation assumed by the Parties. All rights and benefits under this Agreement inure exclusively to the Parties.
- 6.15 LIMITATION ON LIABILITY: EACH PARTY'S TOTAL LIABILITY FOR ANY AND ALL DAMAGES WHATSOEVER ARISING OUT OF OR IN ANY WAY RELATED TO THIS AGREEMENT FROM ANY CAUSE, INCLUDING BUT NOT LIMITED TO CONTRACT LIABILITY OR NEGLIGENCE, ERRORS, OMISSIONS, STRICT LIABILITY, BREACH OF CONTRACT OR BREACH OF WARRANTY SHALL NOT, IN THE AGGREGATE, EXCEED THREE TIMES (3X) THE FEES PAID TO CONSULTANT UNDER THIS AGREEMENT. IN NO EVENT WILL EITHER PARTY BE LIABLE FOR ANY SPECIAL, INDIRECT, INCIDENTAL, OR CONSEQUENTIAL DAMAGES IN CONNECTION WITH OR OTHERWISE ARISING OUT OF THIS AGREEMENT, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. IN NO EVENT SHALL EITHER PARTY BE LIABLE FOR EXEMPLARY OR PUNITIVE DAMAGES ARISING OUT OF OR RELATED TO THIS AGREEMENT.
- 6.16 ALTERNATIVE PRACTICE STRUCTURE; BAKER TILLY INTERNATIONAL: Baker Tilly US, LLP and Baker Tilly Advisory Group, LP and our subsidiary entities provide professional services through an alternative practice structure in accordance with the AICPA Code of Professional Conduct and applicable laws, regulations and professional standards. Baker Tilly US, LLP is a licensed independent CPA firm that provides attest services to clients. Baker Tilly Advisory Group, LP and our subsidiary entities provide tax and business advisory services to clients. Baker Tilly Advisory Group, LP and our subsidiary entities are not licensed CPA firms. Baker Tilly Advisory Group, LP and our subsidiaries and Baker Tilly US, LLP are independent members of Baker Tilly International. Baker Tilly International Limited is an English company. Baker Tilly International provides no professional services to clients. Each member firm is a separate and independent legal entity and each describes itself as such. Baker Tilly Advisory Group, LP and Baker Tilly US, LLP are not Baker

Tilly International's agents and do not have the authority to bind Baker Tilly International or act on Baker Tilly International's behalf. None of Baker Tilly International, Baker Tilly Advisory Group, LP, Baker Tilly US, LLP, nor any of the other member firms of Baker Tilly International has any liability for each other's acts or omissions. The name Baker Tilly and its associated logo is used under license from Baker Tilly International Limited.

- 6.17 **CONSTRUCTION OF AGREEMENT**: This Agreement will not be construed in favor of, or against, either Party but will be construed as if the Parties prepared this Agreement together through a process of negotiation and with the advice of their respective attorneys.
- 6.18 **SEVERABILITY**: If any portion of this Agreement is declared invalid, illegal, or otherwise unenforceable by a court of competent jurisdiction, the remaining provisions will continue in full force and effect.
- 6.19 **AMENDMENT; MODIFICATION**: No amendment, modification or supplement of this Agreement will be valid or binding unless executed in writing and signed by both Parties, subject to CITY approval. The requirement for written amendments, modifications or supplements cannot be waived and any attempted waiver will be void and invalid.
- 6.20 **CAPTIONS**: The captions of the various articles, sections and paragraphs are for convenience and ease of reference only, and do not define, limit, augment, or describe the scope, content, or intent of this Agreement.
- 6.21 **INCONSISTENCIES OR CONFLICTS**: In the event of any conflict or inconsistency between the provisions of this Agreement and any of the exhibits attached hereto, the provisions of this Agreement will control.
- 6.22 **ENTIRE AGREEMENT**: This Agreement, including all attached exhibits, constitutes the entire, complete, final, and exclusive expression of the Parties with respect to the matters addressed herein and supersedes all other agreements or understandings, whether oral or written, which may have been entered into between CITY and CONSULTANT prior to the execution of this Agreement. Any statements, representations, or other agreements, whether oral or written, made by either Party that is not embodied herein will not be valid or binding on the Parties. No amendment, modification or supplement to this Agreement will be valid and binding unless in writing and duly executed by the Parties pursuant to Section 6.16, above.
- 6.23 **FORCE MAJEURE**: The Completion Date for completing the Work may be extended in the event of any delays due to unforeseeable causes beyond the control of CONSULTANT and without the fault or negligence of CONSULTANT, including but not limited to severe weather, fires, earthquakes, floods, epidemics, quarantine restrictions, riots, strikes, freight embargoes, wars, litigation, and/or acts of any governmental agency, including the CITY. CONSULTANT shall within three (3) calendar days of the commencement of such delay notify the City Representative in writing of the causes of the delay. The City

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Representative shall ascertain the facts and the extent of delay and extend the time for performing the services and tasks for the period of the enforced delay when and if in the judgment of the CITY Representative such delay is justified. The CITY Representative's determination shall be final and conclusive upon the parties to this Agreement. In no event shall CONSULTANT be entitled to recover damages against the CITY for any delay in the performance of this Agreement, however caused, CONSULTANT's sole remedy being extension of the Agreement pursuant to this Section.

6.24 **COUNTERPARTS:** This Agreement will be executed in three (3) original counterparts each of which will be of equal force and effect. No handwritten or typewritten amendment, modification, or supplement to any one counterpart will be valid or binding unless made to all three counterparts in conformity with Section 6.16, above. One fully executed original counterpart will be delivered to CONSULTANT and the remaining two original counterparts will be retained by CITY.

IN WITNESS WHEREOF, the Parties hereto have caused this Agreement to be executed the day and year first appearing in this Agreement, above.

CITY OF SAN FERNANDO:

BAKER TILLY US, LLC:

Signed by:
By: Kanika Kith
98E39A35DC49426...
Kanika Kith, City Manager

Signed by:
By: Annie Rose Favreau
A09B0CBF16554D1...

Date: 01/30/2026 | 4:52 PM PST

Name: Annie Rose Favreau

Title: Consulting Director

APPROVED AS TO FORM

Date: 01/20/2026 | 5:31 PM PST

Signed by:
By: Richard Padilla
9E6768364A9F4FC...
Richard Padilla, City Attorney

Date: 01/29/2026 | 9:15 AM PST

REQUEST FOR PROPOSALS

Notice is hereby given that sealed proposals will be received by the City of San Fernando, California, for furnishing the following:

STRATEGIC PLAN CONSULTING SERVICES

in strict accordance with the Specifications on file in the office of the SAN FERNANDO CITY MANAGER'S OFFICE, 117 Macneil Street, San Fernando, California, 91340. Copies of specifications and proposal documents may be obtained from the City's website at [SFCITY.ORG/rfps-rfqs-nibs-nois/](https://www.sfcity.org/rfps-rfqs-nibs-nois/).

An electronic copy of the proposal must be submitted in PDF format via email to the CITY CLERK DEPARTMENT at cityclerk@sfcity.org. The deadline for RFP submissions is **5:00** p.m. on **Thursday, November 13, 2025**. Any bidder may withdraw their proposal, without obligation, at any time prior to the scheduled closing time for receipt of proposals. A withdrawal will not be effective unless made personally or by telephonic notification received prior to the closing date. Proposals may later be referred to the City Council for appropriate action. The City reserves the right to reject any or all proposals as the best interests of the City may dictate.

By: _____
Julia Fritz, City Clerk

Published in The San Fernando Sun on **October 23, 2025**.

City of San Fernando RFP

REQUEST FOR PROPOSALS



The City Manager's Office is requesting proposals for:

STRATEGIC PLAN CONSULTING SERVICES

RELEASE DATE: October 23, 2025

RESPONSE DUE: November 13, 2025

RFP OVERVIEW & TIMELINE	
RFP Title:	Strategic Plan Consulting Services
Scope of Work:	See <i>“Scope of Work”</i> Section on Page 5
RFP Submittal Information:	Submit electronic copies of their proposal in PDF format via email to the CITY CLERK DEPARTMENT at cityclerk@sfcity.org , with the subject “City of San Fernando - Strategic Plan Consulting Services”
RFP Due Date:	Thursday, November 13, 2025 by 5:00 PM PST
RFP Submittal Requirements:	Submitted Proposals must include the information described in the “INFORMATION TO BE SUBMITTED” Section on Pages 8 & 9 of this RFP. Submitted Proposals will be considered non-responsive if the Proposal does not provide all requested information.
City Contact:	Will Pettener Assistant to the City Manager Phone: (818) 898-1226 Email: Wpettener@sfcity.org

GENERAL INFORMATION

The City is soliciting submittals of proposals from qualified Consultants for the facilitation and development of a City San Fernando Strategic Plan for Fiscal Years 2027 to 2031. A strategic plan is a vital tool for local jurisdictions to ensure that the vision and priorities set by the City Council are clearly conveyed to employees and the community, and that City strategies and projects are developed to meet Council priorities, and that overall city government is accountable to meeting community needs.

BACKGROUND

The City of San Fernando was incorporated in 1911 and is currently organized according to the City Council/City Manager form of government with seven departments, including a Police Department, Public Works Department, and Recreation and Community Services Department. The City employs approximately 111 full-time employees from a total Adopted Budget for fiscal year 2025-2026 of \$56.2 million, which includes a General Fund budget of \$28.8 million. The City is a cost conscious provider of outstanding public services to its citizens and local businesses.

In 2021, the City adopted its Five-Year Strategic Goals to guide activities and objectives for Fiscal Years 2022–2026. With many of those goals accomplished and the plan nearing completion, the City is engaging consultant services to develop a new Strategic Plan for Fiscal Years 2027–2031.

Strategic planning defines where the City is headed and how it will get there. To establish a long-term vision supported by a five-year strategic plan, staff proposes releasing a Request for Proposals (RFP) seeking consultant recommendations, work plans, and deliverables that:

- Define what the City of San Fernando aspires to be in the future and position it for long-term success.
- Organize and prioritize City initiatives and resources to achieve identified goals.
- Align the City Council, staff, residents, businesses, and community partners around a shared vision and strategic direction.
- Translate visionary concepts into realistic, measurable, and achievable outcomes.
- Inspire ideas around economic growth, sustainability, fiscal stability, sense of place, and community identity.
- Chart an innovative and actionable path for San Fernando future that sets clear priorities and maximizes opportunities for growth and resilience.

INSTRUCTIONS TO SUBMITTING FIRMS

A. Examination of Proposal Documents

By submitting a proposal, the prospective firm represents that it has thoroughly examined and become familiar with the services required under this RFP, and that it is capable of delivering quality services to the City in a creative, cost-effective & service-oriented manner.

B. Questions/Clarifications

Please direct any questions regarding this RFP to the City Clerk Department at cityclerk@sfcity.org. Questions must be received by 5:00 p.m. PST on **Thursday, November 6, 2025**. All questions received prior to the deadline will be collected and responses will be emailed by **Friday, November 7, 2025**.

C. Submission of Bid Proposals

All bid proposals shall be submitted via email to the City Clerk Department at cityclerk@sfcity.org and the subject line of the email shall read, "City of San Fernando RFP – Strategic Plan Consulting Services." Proposals must be received no later than Thursday,

November 13, 2025 at 5:00 PM PST. All proposals received after that time will not be accepted.

D. Withdrawal of Proposals

A firm may withdraw its proposal at any time before the due date for submission of proposals as provided in the RFP by delivering a written request for withdrawal signed by, or on behalf of the prospective firm.

E. Rights of City of San Fernando

This RFP does not commit the City to enter into a Contract, nor does it obligate the City to pay for any costs incurred in preparation and submission of proposals or in anticipation of a contract.

The City reserves the right to:

- 1) Make the selection based on its sole discretion;
- 2) Reject any and all proposals without prejudice;
- 3) Issue subsequent Requests for Proposal;
- 4) Postpone opening for its own convenience;
- 5) Remedy technical errors in the Request of Proposal process;
- 6) Approve or disapprove the use of particular sub-contractors;
- 7) Negotiate with any, all, or none of the prospective firms;
- 8) Solicit best and final offers from all or some of the prospective firms;
- 9) Accept other than the lowest offer; and/or
- 10) Waive informalities and irregularities in the proposal process.

F. Contract Type

It is anticipated that a standard form professional services agreement contract will be signed subsequent to City Council review and approval of the recommended firm.

G. Collusion

By submitting a proposal, each prospective firm represents and warrants that; its proposal is genuine and not a sham or collusive or made in the interest of or on behalf of any person not named therein; that the prospective firm has not directly, induced or solicited any other person to submit a sham proposal or any other person to refrain from submitting a proposal; and, that the prospective firm has not in any manner sought collusion to secure any improper advantage over any other person submitting a proposal.

SCOPE OF SERVICE

The City of San Fernando is seeking a highly qualified consultant to assist in the facilitation and preparation of a Strategic Plan resulting in a comprehensive roadmap outlining the City's vision, goals, and planned projects to ensure measurable progress and successful achievement of the City's vision. The City envisions employing a variety of stakeholder engagement processes to assist the City Council in forming a long-term vision that serves as the foundation for a five-year Strategic Plan and priority setting process. Proposed RFP services would include:

1. Employee and Stakeholder Engagement

- Develop an engagement process for employee participation in reviewing and providing feedback on top priorities, strategies and projects.
- Include a community engagement strategy and framework that could be included in the development of the plan.

2. Goal Setting & Strategic Planning Workshop Facilitation

- Conduct planning meetings with City Council, City Manager and Executive staff.
- Develop a draft Vision statement and Strategic Priorities for the strategic plan; and
- Facilitate workshops for City Council and staff.

3. Strategic Plan Development

- Develop a method and timeline for plan updates and revisions.
- Identify the City's major strategic issue areas, including a defined goal for each area as well as outline of associated priorities for achieving those goals.
- Provide methods for implementing and measuring recommended goals and objectives.
- Based on feedback from the Executive staff and employees, draft Strategic Plan grounded in a realistic assessment of staff and funding capacities and/or make resource adjustment recommendations for successful implementation.

4. Implementation & Performance Monitoring Strategy

- Recommend final Strategic Plan document that includes an implementation plan with benchmarks or milestones that measure the City's progress.
- Develop methodologies for monitoring performance within the framework of the strategic plan, ensuring that priorities and goals are integrated within the budget decision-making process using financial and performance metrics reporting.

SCHEDULE FOR SELECTION

TASK	DATE
RFP Available Online	October 23, 2025
Deadline for Submittal of Questions	November 6, 2025
Staff Responses to Questions	November 7, 2025
Proposal Due	November 13, 2025
Proposal Review Period	November 17-25, 2025
Council Action for Approval of Professional Services Agreement	December 1, 2025

The schedule above is tentative and subject to change at the discretion of the City, with appropriate notice to prospective Proposers. Please check the City of San Fernando website for the latest updates at <https://ci.san-fernando.ca.us/rfps-rfqs-nibs-nois/>. All times noted throughout the

Proposer must be available on Monday, December 1, 2025, in-person or virtually, for a possible presentation to the City Council.

METHOD OF SELECTION AND NOTICES

The City Manager’s Office will evaluate the information provided in the submitted proposals using the following criteria as a guideline:

- Completeness and Comprehensiveness;
- Responsiveness to City’s issues;
- Potential to benefit the City;
- Experience of the firm providing similar services to other municipalities;
- Cost effectiveness; and
- Quality of proposed staff.

INFORMATION TO BE SUBMITTED

1. Prospective Firms must submit one digital copy of their proposal via email to cityclerk@sfcity.org in PDF format.

2. Include a *Proposal Summary* Section

This section shall discuss the highlights, key features, and distinguishing points of the Proposal. A separate sheet shall include all the contact people on the Proposal and how to communicate with them.

3. Include a *Profile of the Proposing Firm(s)* Section

This section shall include a brief description of the Firm, including size, location of office(s), number of years providing service, organizational structure of the division responsible, etc.

Additionally, this section shall include a listing of any lawsuit and the result of that action resulting from (a) any public project undertaken by the Firm where litigation is still pending or has occurred within the last five years or (b) any type of project where claims or settlements were paid by the Firm or its insurers within the last five years.

4. Include a *Qualifications of the Firm* Section

This section shall include a brief description of the Firm's qualifications and previous experience of similar or related services provided to other agencies. Provide a description of pertinent experience with other public municipalities (maximum of four) that includes a summary of the work performed, the total amount billed, the period over which your Firm represented the agencies, and the name, title, and phone number of clients to be contacted for references. Include at least two (2) sample reports for similar projects prepared for other local government agencies. Describe any attributes that distinguish the services provided by your firm/individual from others that would help the City in the selection process.

5. Include a *Work Plan* Section

In this section, present a well-conceived service plan. This section of the proposal shall establish the Firm's understanding of the City's Scope of Services in this RFP and the Firm's ability to satisfy the objectives and requirements outlined in the scope. Describe the proposed approach for addressing the scope of service, outlining the approach that would be undertaken in providing the requested services, and the tentative schedule for project completion. Additionally, describe related service experience by the Firm in

similar work. Please describe the role, extent of services (number of people used, engagement duration, and contract value).

6. Include a *Proposed Staffing Section*

In this section, discuss how the Firm would propose to staff the City's requested strategic plan consulting service needs. Firm's key team members shall be identified by name, specific responsibilities and their qualifications. An organizational chart for the attorney team and resumes for key Firm personnel shall be included. Key Firm personnel will be an important factor considered by the City Manager's Office. **There can be no change of key personnel once the proposal is submitted, without prior approval of the City.**

7. Include a *Proposal Costs Sheet and Rates Section*

In this section, include the proposed costs to provide the services desired. Include any other cost and price information that would be contained in a potential agreement with the City.

In addition, include the costs for any other services that are considered optional additions.



MOSSADAMS



bakertilly

NOVEMBER 13, 2025

City of San Fernando

PROPOSAL FOR STRATEGIC PLAN CONSULTING SERVICES

Colleen Rozillis, Managing Principal

Annie Rose Favreau, Director

Al Zelinka, Director

Khala Stanfield, Director



Proposal summary

Dear City of San Fernando Review Committee,

We are pleased to submit our proposal to provide strategic plan consulting services for the City of San Fernando (City). We are confident we offer the team, capabilities, approach, and level of dedicated service that will meet or exceed your expectations for the following reasons:

- **Extensive strategic planning expertise.** For over 40 years, we have provided strategic planning services to public sector organizations, not-for-profit entities, and businesses. Our planning expertise will enable us to help the City develop a comprehensive, practical, and achievable strategic plan that engages stakeholders throughout the planning process. Our approach identifies not just key goals and priorities, but the actionable steps to attain goals; implementation planning; and performance measures to monitor and report progress to leadership and the community.
- **Our approach is grounded in comprehensive stakeholder engagement.** We firmly believe the planning process is just as important as the resulting plan. Effectively engaging City leadership, employees, and community stakeholders will be critical to successful execution of the plan.
- **Professionals who communicate effectively with government.** Because we're hired by government clients to solve challenging oversight and operational problems at the highest levels, we're well versed at dealing with all levels of government. Your proposed team reports to councils, finance and audit committees, and senior management on a regular basis.

We hope after reviewing our proposal you find Baker Tilly highly qualified to provide the City's strategic planning consulting services. We look forward to the possibility of working with you on this important undertaking. Thanks very much for your consideration.

We can't wait to get started.

Sincerely,

Colleen Rozillis
Managing Principal

+1 (206) 302 6795 | collen.rozillis@bakertilly.com

Annie Rose Favreau,
Director

+1 (206) 302 6326 | annierose.favreau@bakertilly.com

Contact information

Annie Rose Favreau, director, will be the City's primary point of contact for this proposal. Her contact email and phone number are shared below. Also attached is Colleen Rozillis, our consulting managing principal. Colleen will serve as the escalation point during any work should we be awarded a contract.

Annie Rose Favreau, Director	+1 (206) 302 6326 annierose.favreau@bakertilly.com	Project Director, Primary Point of Contact
Colleen Rozillis, Managing Principal	+1 (206) 302 6795 colleen.rozillis@bakertilly.com	Engagement Principal

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Key personnel	17
Cost sheet and rates	19
Appendix: Resumes	20

The information provided here is of a general nature and is not intended to address the specific circumstances of any individual or entity. In specific circumstances, the services of a professional should be sought.

Baker Tilly US, LLP and Baker Tilly Advisory Group, LP and its subsidiary entities provide professional services through an alternative practice structure in accordance with the AICPA Code of Professional Conduct and applicable laws, regulations and professional standards. Baker Tilly US, LLP is a licensed independent CPA firm that provides attest services to clients. Baker Tilly Advisory Group, LP and its subsidiary entities provide tax and business advisory services to their clients. Baker Tilly Advisory Group, LP and its subsidiary entities are not licensed CPA firms.

Baker Tilly Advisory Group, LP and Baker Tilly US, LLP, trading as Baker Tilly, are independent members of Baker Tilly International. Baker Tilly International Limited is an English company. Baker Tilly International provides no professional services to clients. Each member firm is a separate and independent legal entity, and each describes itself as such. Baker Tilly Advisory Group, LP and Baker Tilly US, LLP are not Baker Tilly International's agent and do not have the authority to bind Baker Tilly International or act on Baker Tilly International's behalf. None of Baker Tilly International, Baker Tilly Advisory Group, LP, Baker Tilly US, LLP nor any of the other member firms of Baker Tilly International has any liability for each other's acts or omissions. The name Baker Tilly and its associated logo is used under license from Baker Tilly International Limited.



Firm profile

Guiding you with our resources, reputation and reach

Making decisions today to shape tomorrow is never easy. That's why the City of San Fernando (City) needs a consulting firm with the right blend of industry insight, functional expertise and technical know-how. Baker Tilly is that firm.

We focus on the intersection of strategy and execution to help you move forward with clarity and confidence. Our consulting services are designed to:

- **Deliver innovative, practical solutions** that help you adapt quickly, implement best practices, strengthen your service delivery and generate efficiencies
- **Identify and mitigate risk**, so you can make informed decisions with greater certainty
- **Solve your toughest challenges**, with a team that brings creativity, agility and deep local government knowledge

Our reputation for quality is well-documented. As a leading advisory, tax and assurance firm, we were named a "Leader in Consulting" by Accounting Today. Below are key facts about our consulting practice, including the depth of resources that stand ready to support the City's project team:

Baker Tilly at a glance

2,800+

consulting team members

45+

years of consulting experience

200+

consulting principals

100+

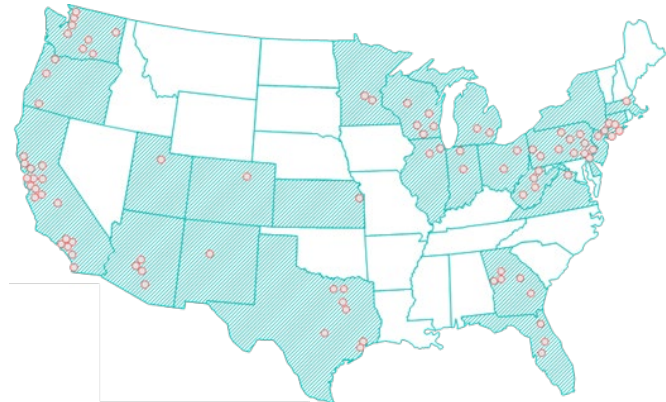
worldwide office locations

40%

of Baker Tilly's \$3B in FY24 firm revenue

300+

workplace and culture awards



When you engage with us, you gain more than a service provider—you gain a collaborative team that aligns with your culture, adapts to your needs and delivers measurable impact. Our flexible engagement model meets you where you are and helps you get where you want to go. Most importantly, the City will benefit from an exceptional experience for your leadership team, your internal teams and those you serve.

Our recent combination



Moss Adams and Baker Tilly have joined forces to redefine accounting, tax, and advisory services for public sector clients. United, we bring a legacy and commitment to helping our clients embrace what's next.

With more than 11,000 professionals in 90-plus locations nationally, our reach and resources fuel our ability to bring deep industry insights, bold thinking, and holistic solutions that serve our clients' unique needs.

Office locations

Baker Tilly has more than 90 locations nationally, with offices in the following 26 states:

- Arizona
- California
- Colorado
- Connecticut
- Delaware
- Florida
- Georgia
- Illinois
- Indiana
- Kansas
- Massachusetts
- Michigan
- Minnesota
- New Jersey
- New Mexico
- New York
- Ohio
- Oregon
- Pennsylvania
- Tennessee
- Texas
- Utah
- Washington
- Washington D.C.
- West Virginia
- Wisconsin

Our office location nearest to the City is in Woodland Hills, California.

21700 Oxnard Street Suite 300
Woodland Hills, CA 91367

Number of years providing strategic planning consulting

Our consulting team brings over 40 years of experience in assisting organizations like the City to realize their vision and set priorities through our strategic planning services. We support local governments and their agencies, not-for-profit organizations, tribes and tribal entities, and businesses in developing and implementing strategic plans.

Firm organization structure

Baker Tilly Advisory Group, LP and Baker Tilly US, LLP, trading as Baker Tilly, operate under an alternative practice structure and are members of the global network of Baker Tilly International Ltd., the members of which are separate and independent legal entities. Baker Tilly US, LLP, an Illinois limited liability partnership, is a licensed CPA firm that provides assurance services to its clients. Baker Tilly Advisory Group, LP, a Delaware limited partnership, and its subsidiary entities provide tax and consulting services to their clients and are not licensed CPA firms.

Baker Tilly Advisory Group, LP (a Delaware limited partnership) operates under an alternative practice structure with Baker Tilly US, LLP (an Illinois limited liability partnership).

Disciplinary action and litigation statement

As with any large firm, we are occasionally involved in addressing legal and regulatory issues. However, no action, suit, proceeding, inquiry, or investigation before or by any court or federal, state, municipal, or other government authority is pending, or to our knowledge is threatened against our firm, related to or which would have a material effect upon the services contemplated herein.

Firm qualifications and references

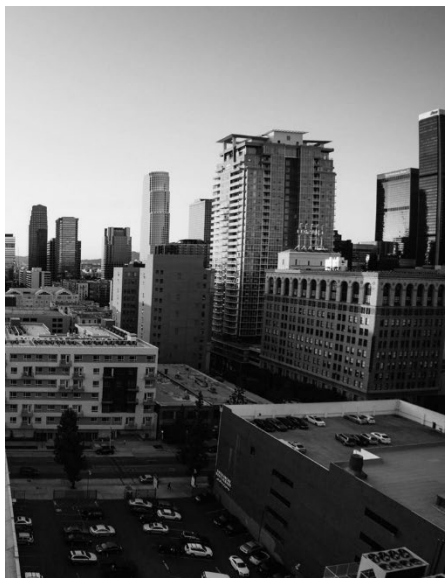
Government experience

You'll receive more effective services from our specialized professionals who have a deep understanding of the pressures you face, like the need for greater efficiency under tight budget constraints. Our significant experience working with local government organizations means our professionals are more likely to help you spot potential problems, create effective solutions, and understand the industry-specific impacts of today's major disruptors.

Baker Tilly has a group of specialized practices with numerous professionals who specialize in serving tax-exempt entities, including governments, higher education institutions, not-for-profits, Tribal and gaming entities, energy and utility entities, and federal contractors. This firmwide team currently serves over 4,200 government clients throughout the United States.

City experience

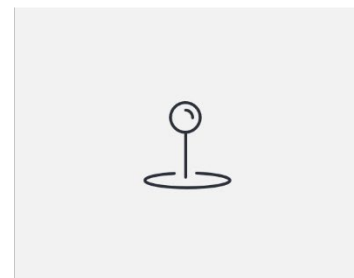
Our firm not only has an extensive government services practice but also deep experience specific to cities. Several of our team members are former city managers, department heads, managers and analysts who served communities as public servants. What you'll find working with Baker Tilly is a team that blends creativity and experience to offer new possible ways for the City to reduce risk, gain efficiency, and take advantage of unique opportunities as they develop. By bringing innovation and creativity together, you'll work with a team that understands and specializes in cities like yours.



More than
500
CITIES
across the nation

More than
600
PUBLIC SECTOR
professionals

More than
4,200
PUBLIC SECTOR
clients across the nation



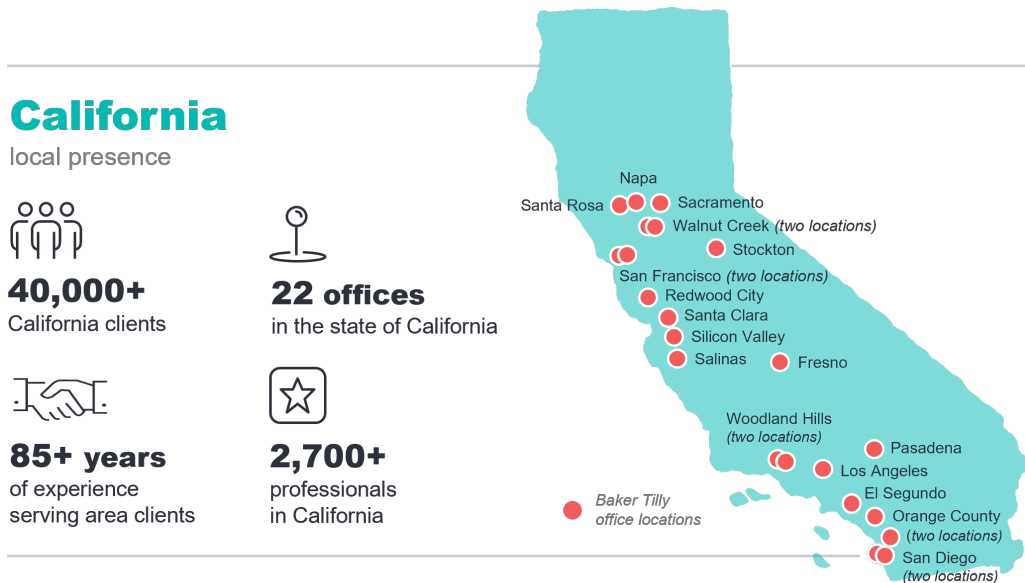
The depth of our practice means we understand the issues you face today and can provide the specialized services you need now and in the future—such as organizational assessments; performance audits; IT hardware, software, and cybersecurity evaluations; fraud investigations; forensic accounting single audits; accounting for complex investment transactions; and benefit plan audits.

Our firm's professionals currently serve as consultants and auditors for more than 500 cities across the nation and nearly 40 local government entities in the State of California. Below is a sample list of the municipal governments we serve in California.

REPRESENTATIVE CALIFORNIA CITY CLIENTS	
• City of Bakersfield	• City of Redondo Beach
• City of Chula Vista	• City of Riverside
• City of Cupertino	• City of Roseville
• City of Fresno	• City of San Jose
• City of Lindsay	• City of Santa Monica
• City of Modesto	• City of Signa Hill
• City of Pasadena	• Town of Loomis
• City of Patterson	

Commitment to California

Our firm has a long history in the Golden State. Since our first office opened, we've grown our footprint in California to 22 locations and serving over 40,000 clients.



Strategic planning experience

At Baker Tilly, our dedicated consultants have a proven track record for developing collaborative, inclusive plans founded in broad stakeholder engagement, clear performance metrics, and processes that support effective progress tracking and reporting.

We've helped numerous local governments like the City develop short- and long-range plans, engage stakeholders, establish priorities, develop policies, define outcomes, develop key performance indicators,

and measure performance. With Baker Tilly, the strategic planning process is just as important as the resulting plan. We work collaboratively with our clients to deliver high-quality, insightful work products that facilitate a productive and rewarding planning process.

Our approach to facilitation and planning is based in three key concepts:

1 Robust Planning Process

Our team has substantial experience facilitating holistic and interactive planning sessions that take a deep dive into the key elements of a comprehensive strategic plan. In these sessions we address an organization's a mission, vision, and core values and evaluate its strengths, weaknesses, opportunities, and threats (SWOT) analysis. We also discuss community needs, strategic objectives, priority initiatives, and key performance measures.

2 Effective Stakeholder Engagement

Our approach is deeply grounded enabling the City's employees, partners, and community members to participate in the planning process. We often utilize tools like focus groups, confidential online surveys, town halls, and public meetings to engage stakeholders. We've found broad participation that enhances insights and perspectives represented in the plan and increases collective buy-in to the plan—both critical to implementation success

3 Implementation Management

In our experience, we've learned that a strategic plan may provide a road map for achieving a defined vision, but it's not always implemented as an effective management tool. That's why, in addition to delivering a comprehensive plan document, we also work with our clients to develop an implementation template and other management tools that can be used to track progress toward each strategic initiative. This way, our clients are prepared to facilitate effective communication, ongoing management, and progress reporting on the plan.

References

The experiences of our clients speak more about Baker Tilly's capabilities than any proposal ever could. That's why we encourage you to talk with our clients. Here are a few individuals who welcome the opportunity to share their Baker Tilly experience. Some of these engagements were performed under the Moss Adams name prior to June 2025 when Baker Tilly and Moss Adams merged into one firm.

Each will give you an authentic perspective as you consider your own needs.

CITY OF CORONA			
2021 STRATEGIC PLANNING SERVICES			
Name	Jacob Ellis	Title	City Manager
Phone	+1 (951) 279 3670	Email	jacob.ellis@coronaca.gov

Project Description: We provided end-to-end strategic planning support, including interviews, data gathering, meeting facilitation, and plan development. We facilitated both in-person and virtual planning sessions with the City’s leadership team and council, conducted interviews with key community stakeholders, and gathered feedback through a community survey with more than 1,000 responses. We also hosted multiple virtual open houses to gather additional community input. The resulting plan has strengthened alignment between leadership and the community, providing a shared roadmap for future growth and investment.

- [City of Corona 2021 – 2026 Strategic Plan](#)

CITY OF PATTERSON			
2017 & 2024 STRATEGIC PLANNING SERVICES			
Name	Ken Irwin	Title	Retired City Manager
Phone	+1 (209) 895 8015	Email	kirwin@ci.patterson.ca.us

Project Description: The City of Patterson engaged our team to facilitate their strategic plan development process in both 2016 and 2023. For both projects, we performed comprehensive stakeholder engagement including interviews, and surveys of staff, management, council, and community groups. In 2023, we also expanded the process to include multiple focus groups to gain perspectives from specific segments of the community (like business owners and Spanish speakers) and a broad public survey. As a result, the City has seen improved alignment between community priorities and City initiatives, leading to more targeted investments and measurable progress toward long-term goals.

- [City of Patterson 2024 – 2028 Strategic Plan](#)

CITY OF SALEM			
2020 & 2025 STRATEGIC PLANNING SERVICES			
Name	Courtney Knox-Busch	Title	Chief Strategy Officer
Phone	+1 (503) 540 2426	Email	cbusch@cityofsalem.net

Project Description: We serve as the City of Salem’s (City) consultant of record, supporting strategic improvement, organizational alignment, and enterprise leadership. In 2020, we performed comprehensive strategic planning services for the City that included interviews, data gathering, meeting facilitation, and plan development. We facilitated City Council work sessions, collaborated with department directors, and performed community engagement. To ensure that the plan was actively connected to the City’s resources, we used the strategic plan strategic goals as the basis for the City’s priority-based budgeting framework. In addition, we helped the City establish an annual planning process where priority activities are selected each year by the management team and then incorporated into the annual budgeting process to ensure that priorities have dedicated and realistic funding. We are currently working with the City to update their strategic plan.

- [City of Salem 2021- 2026 Strategic Plan](#)

CITY OF SANTA MONICA			
VARIOUS CONSULTING SERVICES SINCE 2014			
Name	Susan Cline	Title	Assistant City Manager
Phone	+1 (310) 458 8411	Email	Susan.Cline@santamonica.gov

Project Description: We have been serving as the City of Santa Monica’s internal and performance auditor of record since mid-2014. We initiated our services by conducting a comprehensive enterprise risk assessment and internal controls review. The results provided the basis for identifying areas warranting more detailed evaluations of internal controls, such as cash handling, accounts receivable and revenue, and P-cards, and opportunities for enhancing performance. Since then, we have performed over 25 internal controls and performance audits for the City, with individual audit budgets ranging from \$25,000 to \$200,000, depending on the scope of analysis. In collaboration with City management, we have scoped focused departmental performance audits to identify opportunities for more efficient and effective operations and strategies for fiscal sustainability. We also conducted a comprehensive citywide compensation and service study.

CITY OF HESPERIA			
2024 STRATEGIC PLANNING SERVICES			
Name	Rachel Molina	Title	City Manager
Phone	+1 (760) 947 1018	Email	rmolina@hesperiaca.gov

Project Description: Baker Tilly partnered with the City of Hesperia to design and facilitate a comprehensive strategic planning process that engaged City leadership, staff, and community stakeholders. Our team conducted needs assessments, confidential surveys, and document reviews to gather critical input and ensure alignment with City Council-defined goals. We facilitated an interactive workshop with elected officials and executives to prioritize strategies, define a vision, and establish measurable objectives. The final deliverable included five goals and 37 clear, actionable strategies to implement the strategic plan supported by an implementation framework to integrate priorities into future budgets and operations.

Other Strategic Planning Samples

In addition to the links provided within the references, we encourage you to view these examples of government agency strategic plans that illustrate the diversity of our strategic planning experience:

- [2025 Lane County Strategic Plan](#)
- [2024 Klamath County Strategic Plan](#)
- [2024 Port of Cascade Locks Strategic Plan](#)

Project understanding and work plan

Project understanding

We understand that the City is seeking a highly qualified consulting team to assist in facilitating and preparing the 2027-2031 five-year strategic plan. The key items the City is seeking by bring on a consulting firm are defining the City’s aspirational future-state, the organization and prioritization of City initiatives and resources to achieve those aspirations, the wholistic alignment of public and private City stakeholders around a shared vision and strategic direction, materializing visionary concepts into achievable and measurable goals, bringing outside perspective to the table revolving around ideas of economic and community-oriented goals, and finalize an innovative plan of actions so the City can measure and maximize its path forward towards growth and resilience.

We’ll achieve a successful strategic planning process by properly initiating and defining the project, understanding your strategic priorities, efficiently performing the work, and preparing clearly articulated deliverables. Each stage of our integrated approach to the strategic planning process is described below.

Proposed approach

Phase 1	COORDINATION
----------------	---------------------

Project coordination will encompass finalizing the work plan, establishing progress reporting requirements, confirming responsibilities and timing, ongoing project management, and quality assurance.

Finalize work plan

Upon contract award, we will conduct a kickoff meeting with the City’s strategic planning team to finalize the work plan and establish clear expectations for the project. The work plan will define the scope, timing, resources, and level of effort required to complete each phase. The work plan will also specify the stakeholder engagement process and communication plan, including target participants for each engagement opportunity including staff, leadership, and community stakeholders.

Provide progress updates

We’ll work with City leadership to establish protocols for managing work and submitting progress reports to verify the project is being performed on time, within budget, and at a satisfactory level of quality. To keep you informed of project progress, we will host biweekly or monthly progress coordination meetings, in-person meetings at key milestones, and will provide regular reports (at the City’s desired frequency) that address schedule status, budget status, and any issues that may require attention.

Perform quality assurance

A principal will review all deliverables to verify that our mutual quality standards are met before submittal.

PHASE 1 DELIVERABLES



- Final work plan and schedule
- Ongoing progress reports
- Ongoing quality assurance reviews

Phase 2 **FACT FINDING**

We believe the strategic planning process is just as important as the resulting plan. Fact finding activities will include assembling appropriate information from relevant documents and stakeholder engagement.

Conduct environmental scan

The environmental scan will provide essential input for the planning process by identifying focus areas to be addressed by goals, objectives, and initiatives.

- We'll conduct 1:1 interviews and/or focus groups with City Council members, the City Manager, and Executive staff.
- We will request and review relevant documents, including past plans, organizational charts, and budgets. In addition, we will review any relevant employee or community feedback that has been collected within the past five years.

Key elements of the environmental scan will include understanding the City's current and future needs as we assess strengths, weaknesses, opportunities, and threats.

PHASE 2 DELIVERABLES



- Environmental scan results
- SWOT analysis

Phase 3 **FACILITATION**

This phase involves planning workshops with City leaders to develop core elements of the strategic plan.

Planning session facilitation

We'll facilitate between two and three strategic planning workshops with City leadership (City Council, City Manager, and Executive staff) to create the core elements of the strategic plan. Our planning sessions will focus on the development of strategic goals aligned with the organization's mission, vision, and values; actionable strategies; and performance metrics.


In these interactive sessions, we will:

- Review the results of the environmental scan and SWOT analysis
- Revisit and revise (if needed) the City's mission, vision, and value statements
- Develop strategic goals, objectives, and action items

The work session will be an engaging and iterative process where input from the City Council, management, staff, and community is merged to create a document that reflects the insights and priorities of each group. The goal is to ensure that: 1) priorities are well understood, 2) there is strong alignment between the overarching strategy and the specific tactics, and 3) performance measures are meaningful.

The exact date(s) for the workshops will be determined by the City's project team during the project planning process and will take into consideration participant availability. In between sessions, we may use surveys and small group discussions to gain insight into priorities, outcomes, and activities to achieve results. The goal will be to provide sufficient time between sessions to incorporate results and

review them with City leadership before for the next session, while maintaining momentum by avoiding too much time between sessions.

PHASE 3 DELIVERABLES	
	<ul style="list-style-type: none"> • Planning session agenda, materials, and facilitation for 2-3 sessions • Planning session results
Phase 4	REPORTING

The final phase planning process includes drafting and finalizing the strategic plan.

Draft strategic plan

In addition to the information developed for each stage of the planning process, the primary deliverable will be a comprehensive strategic plan that documents the planning process, participants, and results.

The strategic plan will function both as the City’s blueprint for success and as a powerful communication tool that clearly defines the City’s mission, vision, priorities, goals, objectives, strategies, and outcome measures. The plan will serve as a “living” document that covers a five-year period. The overall strategic plan will incorporate the following elements:

- Vision, mission, and values
- Goals, objectives, and actions
- A high-level implementation roadmap
- Outcome-focused performance metrics

We will submit the draft plan to City leadership for review and revise the draft plan based on comments.

Community outreach

Once an initial draft of the strategic plan is developed, we will gather input from the broader City community—including employees, partners, residents, and stakeholders.

For the employee input, we can conduct an organization-wide survey. For the community input, we will conduct a survey and host at least one in-person and one virtual open house. If desired, we can also do a train-the-trainer model so that City staff members can host additional community input sessions. We will summarize the results of the community outreach efforts and present potential plan updates to City leadership for consideration.

Submit final strategic plan

We will then present the finalized plan and process overview to City Council for adoption.

Process implementation support

Key to implementation success is ongoing tracking, reporting, and evaluation of plan execution. We’ll work with the City to establish an implementation tracking template and a process for data collection to support performance reporting and monitor progress toward the strategic goals. In addition, we will co-develop an annual process where senior management recommend key activities to support the strategic plan goals and objectives in alignment with the City’s budgeting process.


Strategy Management Software (optional)

Recent years have seen the development of robust, moderately priced, cloud-based technology tools to facilitate the strategy deployment and results tracking and reporting processes. These tools allow for a more rapid, effective and sustainable transition from strategic planning to strategic management.

Among the leading providers of strategy management software in the local government market today is a company called Envisio. The strategy, data analytics, performance evaluation and reporting functionality supports important strategic management needs, including:

- Alignment of strategic plan and financial plans
- Aggregation and visualization of results data
- Performance benchmarking
- Organizational and community dashboards to drive transparency
- Management of employee performance

Baker Tilly has a strategic alliance with Envisio, though we are neither a reseller nor an implementer of the Envisio application suite. We can provide value-added professional services in the design of performance dashboards and reporting tools to assist in the tracking and monitoring of strategic plan progress of the progress of any other planning process you may have. Examples could include the annual budget, capital improvement plan, and others. Should you be interested in exploring, now or later in the planning process, we can arrange for a product demonstration and provide costing for consideration.

PHASE 4 DELIVERABLES	
	<ul style="list-style-type: none"> • Draft strategic plan • Employee and/or community engagement results, including the facilitation of two community outreach sessions (one in-person and one virtual) • Final strategic plan • Implementation tracking template and process for tracking and reporting status of the strategic plan • Annual process for selecting strategic plan activities • Strategy management software (optional)

Project timeline

Strategic planning projects typically take approximately five to six months to complete from project start-up to delivery of the final plan. The overall timing will depend on the availability of key City personnel and the general timing of this work in relation to other relevant work impacting the organization. Should we be awarded this work, we are available to begin work shortly after contract execution.

PHASE 1	MONTH 1	MONTH 2	MONTH 3	MONTH 4	MONTH 5	MONTH 6
1. COORDINATION	█	█	█	█	█	█
2. FACT FINDING	█	█	█	█	█	█
3. FACILITATION	█	█	█	█	█	█
4. REPORTING	█	█	█	█	█	█

Key personnel

Meet the service team we’ve assembled to achieve everything you envision. Selected intentionally for your goals and backed by our specialized resources, these individuals are collaborative and multidisciplinary. Their passion for the public sector will make them an unstoppable force on your behalf.

Our proposed team composition is designed to provide a robust combination of quality assurance, project management, government expertise, and strategic planning experience that leverage the specialized expertise of our team members.

The engagement team will be led by Colleen Rozillis, managing principal, who will oversee the quality of deliverables for the City. Annie Rose Favreau, director, will serve as the project director. Annie Rose will head up the day-to-day work effort as well as being the project’s primary contact.

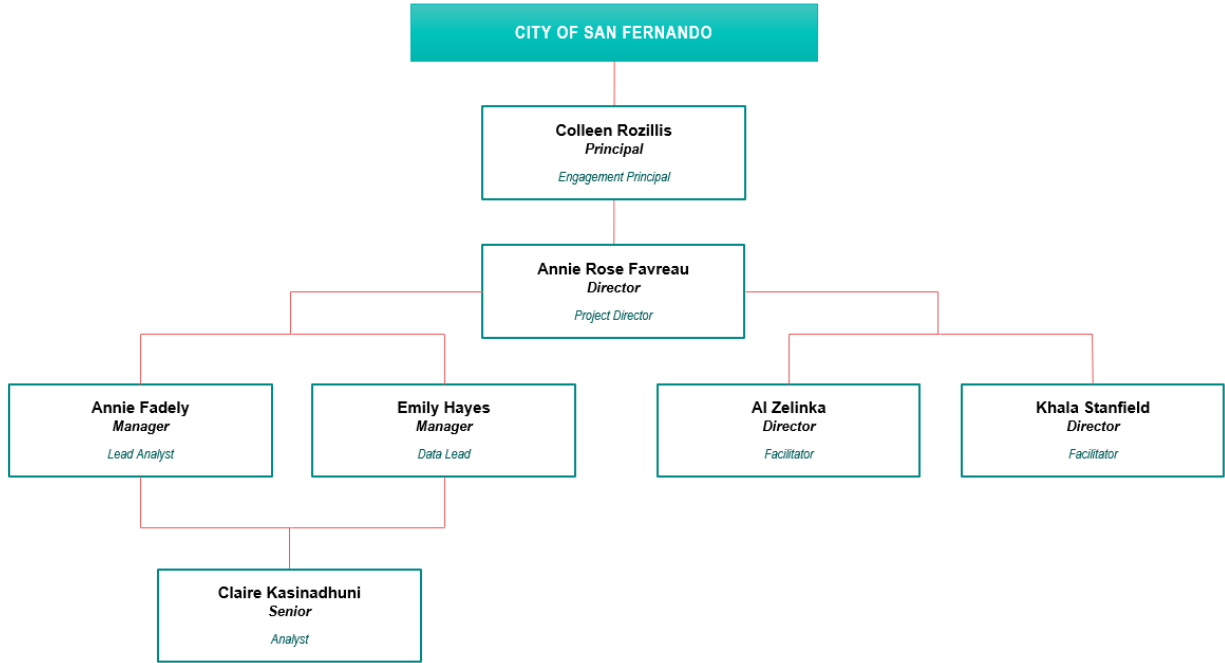
This team will also be joined by Al Zelinka, director, and Khala Stanfield, director, who will be on the team as facilitators and bring their deep experience working as local government leaders to this work. Annie Fadely, manager; Emily Hayes, manager; and Claire Kasinadhuni, senior, will provide analytical support.

Brief resumes including professional qualifications and experience are listed on the pages at the end of this proposal in “Appendix: Resumes”.

Name and title	Role
Colleen Rozillis, MPA, PMP, Managing Principal	Engagement Principal
Annie Rose Favreau, MPA, Director	Project Director
Al Zelinka, FAICP, CMSM, Director	Facilitator
Khala Stanfield, MBA, CSSBB, Director	Facilitator
Annie Fadely, MPA, Manager	Lead Analyst
Emily Hayes, CIA, Manager	Data Lead
Claire Kasinadhuni, MPA, Senior	Analyst

Baker Tilly will not be utilizing subcontractors for this engagement.

Organizational chart



Cost sheet and rates

Sharing our transparent fee estimate

For our clients, it's about more than the dollars you pay at the end of the day; it's about value. You'll get solid and timely deliverables. But more than that, the experience you'll have working with forward-thinking, industry-specialized professionals who work side by side with you to explore new possibilities. Our professional fees will be billed monthly based on the amount of work completed, plus expenses. We are committed to fees that are fair and commensurate with the level of service described in this proposal.

Based on our initial understanding of your needs, we estimate the total cost to be \$60,000.

Service Description	Estimated Hours	Amount
Phase 1: Coordination	30	\$7,500
Phase 2: Fact Finding	60	\$15,00
Phase 3: Facilitation	85	\$22,250
Phase 4: Reporting	65	\$16,250
Total Cost	240	\$60,000

Travel expenses for onsite work will be billed at cost and will be capped at a not-to-exceed level of 5% of the overarching project fee (or \$3,000).

Hourly rates

Our standard hourly rates range from \$300 to \$655. However, given the City's public service focus, we have provided a discounted hourly rate of \$250 for all positions.

Appendix: Resumes

Colleen Rozillis, PMP, *Managing Principal*



Professional Experience

Colleen has over 20 years' experience providing strategic guidance to a diverse range of clients. She helps organizations enhance operations and culture, improve strategic leadership and planning, reduce risk, and cultivate more effective governance. She collaborates with clients to understand their goals and objectives, and to define organizational and programmatic changes that better equip and position them to achieve those goals.

Colleen leads the firm's Strategy, People, & Operations Consulting Practice, overseeing strategic and management consulting teams that are deeply embedded in industries including government, broadband and utilities, health care, not-for-profit, tribal, and higher education. She serves as the consulting leader for the firm's Not-for-Profit and Public Services industry group.

Her extensive government background spans planning, policy, and financial analysis for local and state agencies in more than 20 US states. Previously, she managed the Performance Reporting Branch of the Washington State DOT and authored their 2011–2015 Strategic Plan.

Colleen has provided strategic planning consulting services to clients including City of Benicia, Burns Paiute Tribe, Carson City, City of Corona, City of Creswell, City of North Las Vegas, City of Signal Hill, County of Maui, City of Patterson, Platte River Power Authority, City of Roseville, and City of Salem.

Professional Affiliations

- Past Chair, Board of Trustees, Humanities Washington
- Member, Society for Corporate Governance
- Member, Project Management Institute
- Member, International City & County Management Association
- Member, Institute of Internal Auditors
- Member, Association of Local Government Auditors

Professional Certifications

- Project Management Professional (PMP)

Education

- MS, public policy and management, Carnegie Mellon University
- BA, English and political science, University of Michigan
- Diversity and Inclusion Certificate, Cornell University

Annie Rose Favreau, Director



Professional Experience

Annie Rose helps mission-driven organizations increase their impact. With a focus on organizational development, her areas of expertise include strategic planning, governance consulting, organizational assessments, and leadership facilitation.

Annie Rose has extensive experience bringing practical insights and clear solutions for complex problems to an array of clients in the public and social sectors—including local, state, and tribal governments, not-for-profit organizations, foundations, and higher education institutions.

Annie Rose has recently provided strategic planning consulting services to local government clients including Burns Paiute Tribe, Chelan Douglas Regional Port Authority, Chitimacha Tribe of Louisiana, Corona-Norco School District, City of Corona, City of Salem, City of Signal Hill, City of Patterson, County of Maui, Curry County, Inland Empire Utility Agency, Klamath County, Lane County, Makah Tribe, Northern Ohio Regional Sewer District, Oregon Public Defense Commission, Platte River Power Authority, Port of Cascade Locks, and the Port Gamble S'Klallam Tribe.

Professional Affiliations

- Member, Institute of Internal Auditors (IIA)
- Member, International City and County Manager's Association (ICMA)

Professional Certifications

- Equity-Centered Facilitation Certification, Center for Equity and Inclusion
- Certificate of Nonprofit Board Consulting, BoardSource

Education

- MPA, Daniel J. Evans School of Public Policy and Governance, University of Washington
- BA, French and English literature, Seattle University

Al Zelinka, FAICP, CSM, Director



Professional Experience

Al brings a wealth of experience in both local government leadership and consulting to his work with Baker Tilly's Strategy, People, & Operations Advisory practice. As a Director with Baker Tilly's municipal consulting team, Al coordinates the firm's facilitation and executive coaching services and works with local governments to advance their promise, potential, and performance through strategic planning, organizational assessments, coaching, process improvement, and team building.

Prior to joining Baker Tilly, Al was the City Manager for the City of Huntington Beach, California, and the City Manager (and former Assistant City Manager and Community Development Director) for the City of Riverside, California, as well as the Community Development Director (and Planning Manager) for Fullerton, California. Prior to joining the City of Fullerton, Al was Vice President with RBF Consulting and served as Principal of RBF Consulting's Urban Design Studio. During this time, Al served more than 150 cities in more than 30 states; much of his work was with towns and cities within the Pacific Coast, Intermountain West, and Southwest regions.

In both his municipal leadership and consulting roles, Al develops trusting relationships with elected and appointed officials, agency and organizational executives, and community members to advance quality of life, individual and organizational performance, fiscal stewardship, sustainability, and economic prosperity. He is a Fellow of the American Institute of Certified Planners, is a Certified Main Street Manager, and is certified in Community Economic Development.

Al daily upholds his original career objective: to "make a difference" in communities and the profession.

Professional Affiliations

- Fellow, American Institute of Certified Planners (FAICP)
- University of California, Davis, Professional Coaching for Life & Work Certification (in progress)

Education

- MS, regional planning Cornell University
- BS, public planning, Northern Arizona University BA, French and English literature, Seattle University

Khala Stanfield, MBA, CSSBB, Director



Professional Experience

Khala has more than 12 years of experience in achieving large scale organizational growth by facilitating strategic planning processes, conducting qualitative analysis and industry related research for strategy portfolios and developing fact-based recommendations for leaders to enable critical decisions.

Prior to joining Baker Tilly, Khala served as the Director of Organizational Performance with the City of Glendale, AZ. She was responsible for the city's and departmental strategic plans, data analytics program, internal audit, Lean process improvements and employee and community engagement surveys and facilitation. She achieved a What Works Cities gold certification in 2022 for Glendale's Balanced Scorecard initiative. She is certified in Balanced Scorecard and has Google Project Management and Lean Six Sigma Black Belt certifications.

Professional Affiliations

- National Forum for Black Public Administrators Central Arizona Chapter, President
- National Forum for Black Public Administrators, National Corporate Council Member
- Member, International City and County Manager's Association (ICMA)
- Arizona State University Alumni, executive board member
- Toastmasters International, Distinguished Toastmaster Certification, former Arizona administration manager and division director
- Bethany Church Incorporated, financial administrator

Professional Certifications

- Aveta Business Institute, Lean Six Sigma Black Belt certified
- Google Project Management Certification
- Balanced Scorecard Institute, Balanced Scorecard Professional certification
- State of Arizona, Supervisor Academy certification

Education

- MBA, marketing, University of Phoenix
- BS, global business and financial management, Arizona State University

Annie Fadely, Manager



Professional Experience

Annie works with public sector and values-driven organizations on projects that improve organizational health, maximize resources, and align operations with strategic goals. Her expertise includes assessing functional alignment, staffing levels, risk exposure, and operational efficiency; performance auditing; identifying process improvements; group facilitation and stakeholder engagement; strategic planning; and change management. Annie takes a collaborative, transparent, and detail-oriented approach to each project.

Prior to joining Baker Tilly, Annie held roles in economic policy and political campaign consulting.

Annie has provided strategic planning services to clients including the Port of Cascade Locks, the Chitimacha Tribe of Louisiana, the Inland Empire Utility Agency, the Oregon Public Defense Commission, and the Port Gamble S'Klallam Tribe.

Professional Affiliations

- Member, International City and County Management Association (ICMA)
- Member, Association of Local Government Auditors (ALGA)
- Member, Institute of Internal Auditors (IIA)

Professional Certifications

- Certified Change Practitioner (ProSci)

Education

- MPA, Daniel J. Evans School of Public Policy and Governance, University of Washington
- BA, international studies, University of Washington

Emily Hayes, CIA, Manager



Professional Experience

Emily has served a variety of clients since joining Moss Adams in 2011 by delivering a diverse array of consulting, internal audit, and in-depth research services. Her passion is for helping clients identify, evaluate, and implement opportunities for improvement by providing strategic, operational, and risk management consulting services. Emily's background in research and information management drives her commitment to connecting clients with meaningful, actionable information as part of every engagement.

Her professional areas of focus include assessing and streamlining business processes for effectiveness and efficiency; delivering data transformation support services; strengthening organizational resilience through business continuity and contingency planning; and supporting organizations through mitigating inherent and emerging risks.

Emily leads the delivery of targeted research and analysis services including the development and administration of surveys; developing and tracking performance measures; financial, operational, and compensation benchmarking; and economic, industry, and market analysis.

Her municipal clients include the City of Abilene, City of Bakersfield, City of Berkeley, City of Corona, City of Creswell, City of Culver City, City of Cupertino, City of El Paso De Robles, City of Eugene, City of Fresno, City of Glendale, City of Laguna Niguel, City of Menlo Park, City of Modesto, City of New Port Richey, City of Newport Beach, City of Palo Alto, City of Patterson, City of Portland, City of Redondo Beach, City of Renton, City of Roseville, City of Salem, City of San Jose, City of Santa Monica, City of Santa Rosa, City of Stockton, City of Vancouver, and City of Wasilla.

Professional Affiliations

- Member, Association of Local Government Auditors (ALGA)
- Member, Institute of Internal Auditors (IIA)
- Member, International City and County Manager's Association (ICMA)

Professional Certifications

- Certified Internal Auditor (CIA)

Education

- MS, information management, University of Washington
- BA, international studies, American University

Claire Kasinadhuni, Senior



Professional Experience

Claire has been providing consulting and analytical services since 2020. Her experience includes statistical data analysis, research, literature reviews, and strategy support. She has also been involved in program analysis, the development and implementation of system updates, as well as vulnerability assessments.

Claire is currently working with the Oregon Public Defense Commission on its adoption of an appointed counsel program, as well as adoption for a new financial case management system. She is also working with the Washington State Bar Association and Office of Public Defense on its 2025 Appellate Workload Study, as well as the State of Delaware Office of Defense Services on the application of the National Public Defense Workload Standards for adult criminal, juvenile, and appellate case types. Prior to joining Baker Tilly, Claire served as a judicial fellow and business systems analyst for the Superior Court of California, County of Nevada.

Professional Certifications

- Certificate of Applied Policy and Governance, Sacramento State Capital Fellows Program

Education

- BA, environmental studies, University of Washington
- MA, public administration, University of Washington