



PROPOSAL TO CONDUCT A PERMITTING PROCESS OPERATIONAL EFFICIENCY AUDIT

FEBRUARY 19, 2025

NORTH RICHLAND HILLS, TEXAS

MATRIX
CONSULTING GROUP

Eva Ramirez, Purchasing Manager
City of North Richland Hills
4301 City Point Avenue
North Richland Hills, TX 76180

Dear Ms. Ramirez:

Matrix Consulting Group, Ltd. is pleased to provide the City of North Richland Hills with this proposal to provide permitting process operational efficiency audit services. We have submitted separate proposals for the Fleet and Information Technology Audits and a consolidated proposal. Our permitting proposal is based on our review of the Request for Proposal (RFP) and our experience conducting permitting process projects in the Metroplex and throughout the United States. Collaboration to reach actionable recommendations is the core of our approach and has worked well in our previous work with clients in Texas and across the country. We are uniquely qualified for the following reasons:

- **Our dedicated planning, building, and development consulting team is skilled, certified, and recognized as premier permitting process experts.** Our team includes former permitting and development executives with extensive permit processing auditing experience.
- **Extensive Permitting Study Experience.** We have completed over 200 dedicated permitting studies over our 20+ year history, with over 50 similar studies completed in the past five years by our proposed project team. This is in addition to our over 100 total permitting studies within organization-wide studies.
- **Experience in the State of Texas.** We have completed many development projects across Texas, with recent clients including the cities of Dallas, Flower Mound, and Prosper.
- **Innovative Solutions.** We are proud to be regarded as industry experts who develop customized and implementable solutions for our clients. Approximately 85% of the recommendations have been implemented within three years of our study completion.

As the firm's President, I am authorized to negotiate on its behalf and bind it contractually. I can be reached at 650-858-0507 or via email at apennington@matrixcg.net. On behalf of the firm, I look forward to discussing our proposal, project team, and experience with you and the opportunity to work with the City of North Richland Hills.



ALAN D. PENNINGTON

President
Matrix Consulting Group, Ltd.

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DEMONSTRATED EXPERIENCE, QUALIFICATIONS, AND REPUTATION

This section of our proposal demonstrates that our firm has the qualifications and experience to complete an efficiency audit of the City's permitting processes and operations.

FIRM OVERVIEW

Matrix Consulting Group, Ltd. is a management consulting firm dedicated to providing quality analytical, evaluation, support, and training assistance to local government. Our company was formed by experienced consultants to pursue an operating model in which analytical work is performed by senior-level staff. Our firm can be summarized as follows:

- We are a California-based firm that provides management consulting services throughout the United States and Canada. We were incorporated in 2003 and are registered to conduct business in Texas.
- We are headquartered in San Mateo and have regional offices in Trophy Club (TX), Charlotte (NC), Edwardsville (IL), the Tampa (FL) area, Portland (OR), and Nova Scotia, Canada.
- We are comprised of 30 full-time and seven part-time highly experienced management consultants who specialize in analyzing local government functions encompassing the entire spectrum of critical operational areas.
- Since our founding, we have worked with over 1,800 government agencies, conducting management studies and cost-of-service evaluations and providing recommendations on operations, improvements, and cost recovery.
- We take a holistic approach to evaluating operations, processes, policies, and resource needs to provide efficient and effective services to both the public and internal customers.
- We have a dedicated development review and permitting practice that includes three former development and permitting directors who directly oversaw their City's permitting and development processes.

We have dedicated experts in government internal service functions such as fleet, information technology, and permitting. The following outlines the core service areas of our firm:

Administrative Services
Community Development
Diversity, Equity and Inclusion
Facilities and Space Planning
Information Technology

Fire and EMS
Fleet Management
Law Enforcement
Permitting
Sustainability

This proposal is our response to the permitting process operational efficiencies. It should be noted, however, that we have expertise in all three areas that the City is seeking assistance with and have also

submitted a consolidated proposal outlining cost savings and efficiencies achievable if our firm is awarded multiple engagements.

PERMIT AUDIT EXPERIENCE

Since our founding in 2003, our firm and project team have conducted over 200 dedicated permitting and development review studies. The following table provides an overview of permitting and development review audits and assessments completed since 2020.

Boston, Massachusetts	Greeley, Colorado	Redondo Beach, California
Bradenton, Florida	Knoxville, Tennessee	Richland, Washington
Champaign, Illinois	Maui County, Hawaii	Rocklin, California
Clearwater, Florida	Menlo Park, California	Royal Oak, Michigan
Dallas, Texas	Miami Beach, Florida	Riverside, California
East Point, Georgia	Milpitas, California	Rowan County, N. Carolina
El Segundo, California	Mountain View, California	Sammamish, Washington
Flower Mound, Texas	Napa County, California	San Dimas, California
Forest Grove, Oregon	New Orleans, Louisiana	Stafford County, California
Fort Collins, Colorado	Prosper, Texas	Thousand Oaks, California
Fort Worth, Texas	Raleigh, North Carolina	Ventura, California

We are currently working on similar permitting process evaluations for Escondido and Hawthorne (CA), and Redmond (WA). Details about any project listed above are available upon request.

REGIONAL EXPERIENCE

We have completed more than 80 projects for municipalities across Texas. The table below shows projects completed since 2019.

Year	Client	Project
Current	Duncanville	Police and Fire Staffing Study
2024	Addison	Facility Maintenance, Police, and Fire Operational Assessments
2024	Dallas	Development Services Implementation; Cost Allocation Plan
2024	Frisco	Fire Standard of Cover
2024	New Braunfels	Patrol Staffing Study
2024	Pearland	9-1-1 Study
2024	Prosper	Development Review Process Study
2024	San Marcos	Staffing Study
2023	Addison	Staffing and Operations Study; Cost of Service Study
2023	Dallas	Cost Allocation Plan
2023	DeSoto	Fire Staffing and Operational
2023	Georgetown	Staffing and Operations Study
2023	Kyle	Staffing and Operations Study
2023	Parker County	Emergency Communication Staffing Study
2023	Round Rock	Fire Standard of Cover

Year	Client	Project
2023	Travis County	Jail Operational Assessment and Staffing; Fire Fees (Travis Co. ESD12)
2022	Burleson	Police Staffing and Facilities Study
2022	Cedar Park	Fire Department Study
2022	Dallas	Cost Allocation Plan
2022	Dallas	Development Services Audit
2022	Denton	Cost of Services Study; Development Fee Study; Fleet Follow-up
2022	DeSoto	Fire Department Study
2022	Fort Worth	Police Study Update
2022	Texas City	Police Study
2021	Boerne	Police Study
2021	Buda	Police Study
2021	Cedar Hill	Police and Fire Study
2021	Dallas	Cost Allocation Plan
2021	Fair Oaks Ranch	Police Study
2021	Keller/Westlake	Fire Consolidation Study
2020	Bellaire	Cost Allocation Plan; User Fee Study
2020	Bexar County	Fleet Study
2020	Dallas	Cost Allocation Plan
2020	DFW Int. Airport	Shift Optimization Study
2019	Dallas	Cost Allocation Plan
2019	Denton	Fleet Study

Details about any project listed are available upon request.

FIRM LOCATIONS

Matrix Consulting Group is an international firm (United States and Canada). The consultant engaged on this project will be based in Florida, Montana, New Jersey, and North Carolina.

CLIENTS SERVED

A summary of recently completed permitting and development review operations projects that included some or all elements of this scope is shown below.

Client Info	Project Summary
<p>Champaign, IL Nov 2023 – Sep 2024</p> <p>Bruce Knight, FAICP, Planning and Development Director Bruce.Knight@champaignil.gov 217.403.8804</p>	<p>Development Review Audit: The firm conducted a comprehensive audit of the City’s development review processes and functions. Development review operations are split between Planning and Development Department, Fire Department (Building Safety), and Public Works. This study evaluated all aspects of the development review, permitting, and inspection processes, operations, and staffing needs with a focus on providing enhanced customer service, predictable and timely service.</p>

Client Info

Project Summary

As the City is undertaking the implementation of a new permitting software system, this study was identified ways to improve internal collaboration and coordination. Key recommendations included: moving Building Safety from the Fire Department and consolidate with Planning and Development, implementing a case management approach to manage major planning and building applications, identification of staffing needs to meet service level goals, reclassification of several positions to align with assigned job duties, and to implement customer service training so that staff speak with one voice when representing the City. Several recommendations were implemented between the draft and final report stages of the audit.

Dallas, TX

Original Study: Apr 2021 – Nov 2022

Implementation Assistance:
Aug 2022 – July 2024
Jul 2022 – ongoing

Vernon Young, Deputy Director
– Customer & Team Excellence
vernon.young@dallas.gov
214.948.4059

Evaluation of the Sustainable Development and

Construction Department: Matrix Consulting Group completed an assessment of the City's Sustainable Development and Construction Department which included building permitting and inspections, engineering, and zoning functions. Dallas has experienced significant growth and development, and this evaluation was conducted as a result in decreased processing times, challenges with customer service, and providing efficient and effective services. This study evaluated all operational, organizational, technology, and staffing needs of the department.

Key recommendations focused on identification of process improvements to create enhanced operational efficiencies, technology changes to improve staff and customer workflows and efficiencies, and identification of staffing needs to meet desired service levels.

Once staffing needs were identified, the project team analyzed the organizational structure to focus on proper oversight and accountability of the department, realign several teams to focus on specific functions versus a more generic approach, and identified several employee classifications that needed to be reclassified to better align with actual duties and to increase career succession planning and growth in the organization. The study resulted in a framework for the department to implement the recommendations and to make substantial changes to work practices.

The project team recently assisted with the original study's recommendation. Implementation assistance included:

Client Info

Project Summary

Flower Mound, TX
Dec 2019 – Jul 2020

JP Walton, Strategic Services
Manager
jp.walton@flower-mound.com
972.874.6081

Evaluation of the Development Review Process: This study was undertaken by the Town to assess the organizational structure, staffing levels, and service delivery needs related to development review, permitting, and inspection processes for a fast growing community. This included a review of Building Inspections, Planning, Fire Marshal, and Environmental operations and processes related to permitting, review, and inspection processes.

Key recommendations included: create a two phased approach to create a one-stop shop development review counter, enhancement of online permitting resources; clearly identify roles and responsibilities of different review staff; enhanced fee transparency; digitize historic platting information; add two building inspector positions; and a business analyst (software focused) for this fast growing community. The Town was provided with a phased implementation plan over 5 years.

Prosper, TX

Study One: May – Aug 2021
Study Two: January – May 2022
Study Three: June – Oct 2024

Hulon Webb, Jr., P.E. Director of
Engineering Services
hwebb@prospertx.gov
972-569-1065

Process Improvement and Customer Survey: Matrix Consulting Group has three studies with Prosper to evaluate their development review services over the past 4 years. Studies have focused on understanding customer perceptions, auditing permitting applications and identification of efforts to improve the quality of applications, improve staff’s approaches to reviewing applications and providing comments, customer service improvements, and how to better leverage technology.

Between studies two and three, the City implemented a new permitting software platform. Our most recent engagement included evaluating previous recommendation implementation, conducting peer research on performance timelines and expectations, process review, and aligning staffing resources to meet current workload and service levels.

Rocklin, CA

May 2022 – Feb 2023

Elizabeth Sorg, Management
Analyst

Development Review Process Assessment (included IT assessment of permitting systems): Rocklin commissioned this organizational assessment of the Community Development and Public Services Departments to identify operational efficiencies, process modifications, staffing

Client Info

elizabeth.sorg@rocklin.ca.us
916.625.5582

Project Summary

needs, and an appropriate organizational structure for the planning, building, engineering, and transportation functions. Key tasks included the diagramming of existing processes, review of existing workload and corresponding staffing levels, technology utilization analysis, and organizational structure assessment.

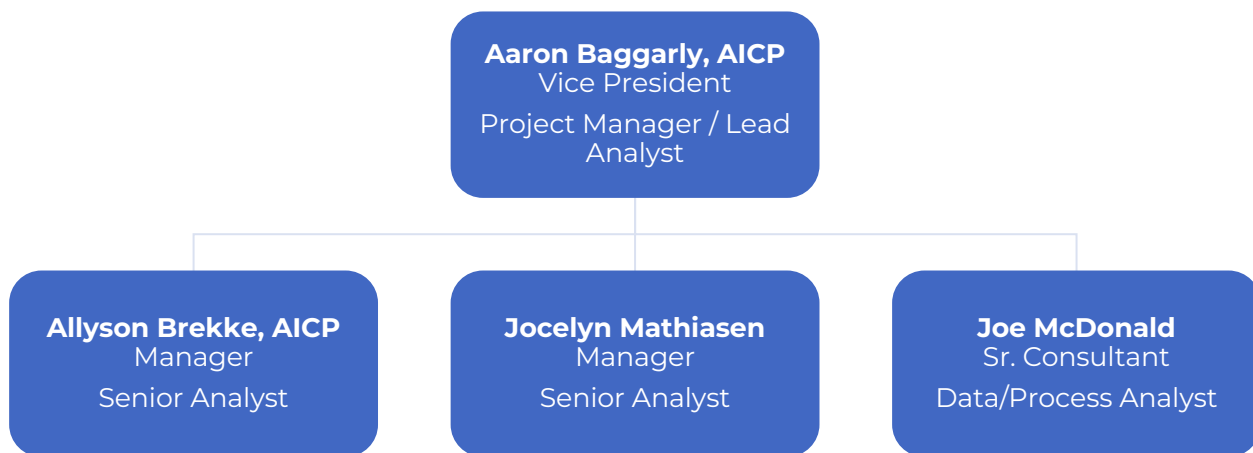
Key recommendations for this study were: fully implement a new permitting software system and electronic review platforms, complete a comprehensive assessment of the zoning code (currently underway) and update the code to align with current development trends, transition to an in house City Engineer, move the Public Services Engineers to Community Development and under the supervision of the City Engineer, contract for environmental review, establish performance metrics, and reclassify Office Assistants and Permit Technician staff to better align with primary duties performed.

Additional details about any project listed are available upon request.

PROJECT TEAM

The consultants proposed for this engagement have broad experience working together analyzing local government permitting operations. The organization of our proposed permitting process operational efficiency audit team is shown below. All staff members are full-time members of the firm.

Please note that if we are awarded multiple studies, we will add a principal in charge (Alan Pennington, President).



RESUMES

Resumes for our project team and their level of involvement are outlined in the next few pages.



AARON BAGGARLY, AICP
Vice President

BIOGRAPHY:

Aaron Baggarly is the lead analyst on development review, permitting, and inspection related engagements. Prior to joining the firm, he was the Planning and Development Director in Stillwater, Oklahoma.

- Completed over 50 studies for municipal development operations, including: analysis of planning, building, and code enforcement, organizational review, and process evaluation and reengineering.
- Performed data and workload analysis, needs assessments, visioning, organizational and staffing assessments, public engagement, and best management practices evaluation.
- Serves as Chair of his local Board of Adjustment.

EXPERIENCE HIGHLIGHTS:

PROSPER, TX: PERMITTING PROCESS IMPROVEMENT STUDIES

Aaron led all three of the firm's past efforts with the Town to identify improvement opportunities for their permitting and development processes. Key recommendations focused on:

- Revise the development review process to be more streamline and require complete applications at submittal.
- Identified technology improvements to streamline the customer portal, internal workflows, and roles in the permit review process.

VENTURA, CA: DEVELOPMENT REVIEW PROCESS ANALYSIS

Aaron was the lead analyst for this study which analyzed the City's development processes. Key study findings included:

- Develop a comprehensive development guide and an online one-stop shop to provide guidance on the City's permit review process.
- Revise the approach to internal development review committees to increase collaboration between review entities.

ROLE ON THIS ENGAGEMENT:

Aaron will serve as the Project Manager and Lead Analyst.

RELEVANT CLIENTS:

- CA Downey
- CA Menlo Park
- CA Milpitas
- CA Redondo Beach
- CA Redwood City
- FL Bradenton
- FL Clearwater
- FL Miami Beach
- MA Boston
- NC Raleigh
- NC Rowan County
- OR Forest Groves
- TX Dallas
- TX Fort Worth
- TX Flower Mound
- TX Prosper
- TN Knoxville
- VA Blacksburg
- VA Stafford County
- VT Burlington
- WA Richland

YEARS OF EXPERIENCE:

18

EDUCATION:

BS, Appalachian State University, Community and Regional Planning, Minor in GIS.

PROFESSIONAL ASSOCIATION:

American Institute of Certified Planners (AICP)
American Planning Association



ALLYSON BREKKE, AICP
Manager

Allyson Brekke focuses on the Community Development Services practice area, with specialty knowledge in Town and Gown Relations, Historic Preservation, Economic Development, Cultural Resources, and Strategic Planning. Prior to joining the firm, Allyson served as Deputy Planning Director for Gallatin County, Montana and Director of Community and Economic Development for Port Angeles, Washington. Her relevant experience includes:

- Strategic planning, capital plan updates, budget/work plan development, development review and permitting efficiencies and analysis.
- Long-range planning efforts for environmental protection, comprehensive plans and housing needs.
- Organization and operation development and coordination of intergovernmental policies, programs, and operations.
- Community outreach facilitation and neighborhood planning.

EXPERIENCE HIGHLIGHTS:

REDONDO BEACH, CA: EVALUATION OF THE COMMUNITY DEVELOPMENT DEPARTMENT

Allyson served as the senior analyst on this evaluation of the City's Community Development Department. This study focused on creating a more predictable entitlement and permitting processes, aligning staffing resources and workload, transitioning to new development review software, that included online application submittal and digital plan review. A comprehensive workload and staffing analysis was completed for planning and building operations.

ROYAL OAK, MI: COMMUNITY DEVELOPMENT ORG ANALYSIS

Allyson was the senior analyst on this engagement which evaluated the development review and permitting processes, workload, staffing level, and organizational structure. Recommendations focused on enhanced utilization of technology, customer service improvement, and staffing training opportunities.

ROLE ON THIS ENGAGEMENT:

Allyson will focus on permitting and policy compliance.

RELEVANT CLIENTS:

- CA El Monte
- CA Escondido
- CA Piedmont
- CA Redondo Beach
- IL Champaign
- MA Boston
- MI Royal Oak
- MO Jefferson City
- NC Raleigh
- NJ Paterson
- SC Columbia
- TX Prosper
- VT Burlington

YEARS OF EXPERIENCE:

21

EDUCATION:

- MCP, University of Pennsylvania, City Planning
- BA, University of Mary Washington, Historic Preservation

PROFESSIONAL ASSOCIATION:

- American Institute of Certified Planners (AICP)
- Study Certificate in Town and Gown Relations
- Graduate of Northwest Women's Leadership Academy



JOCELYN MATHIASEN
Manager

Jocelyn Mathiasen is an experienced consultant that focuses on local government permitting and operational experience. She previously served as the Permitting Manager in Bellevue, WA and was instrumental in the development of the MyPermits portal. Her experience encompasses local and regional permitting agencies. Emphasis focused on increased efficiency and collaboration between different departments and government entities.

EXPERIENCE HIGHLIGHTS:

DOWNEY, CA: COMMUNITY DEVELOPMENT OPERATIONS AND STAFFING STUDY

Jocelyn served as an analyst on this engagement. Key findings included:

- Opportunities to leverage technology to improve the customer experience and educational outreach.
- Dedicated and cross-trained permit technicians to process development applications.
- Convert key contracted positions to city employees (e.g., Chief Building Official and Building Permit Tech, etc.).

MIAMI BEACH, FL: DEVELOPMENT REVIEW EVALUATION

Jocelyn was the lead analyst on this engagement that focused on improved operational efficiencies, review of permitting times and processes, and a review of the development code/ordinances to identify chokepoints in the process for efficient and timely development.

- Modified the building permit review process to reduce the number of resubmittals and number of review entities.
- Technology and legislation improvements to help meet adopted review timelines.
- Modifications to the application requirements and clear identification of the decision-making authority.

ROLE ON THIS ENGAGEMENT:

Jocelyn will focus on building, permitting, and technology needs.

RELEVANT CLIENTS:

- CA Downey
- CA Los Angeles
- CA San Dimas
- CA Redlands
- CA Rocklin
- CO Westminster
- FL Clearwater
- FL Miami Beach
- FL Fort Myers
- GA DeKalb County
- GA East Point
- LA New Orleans
- MA Boston
- NC Rowan County
- TX Dallas
- TX Denton
- TX Flower Mound
- TX Fort Worth
- VA Blacksburg
- VA Virginia Beach
- WA Bellingham
- WA Richland
- WI Waukesha County

YEARS OF EXPERIENCE:

29

EDUCATION:

Master of Public Policy from Harvard University, BA in Government from Oberlin College

PROFESSIONAL ASSOCIATION:

International Code Council
American Planning Association



JOE MCDONALD
Senior Consultant

Joe McDonald has served as an analyst on a wide variety of engagements, ranging from community development departments to municipal airports. Joe assists in developing client surveys, documenting current and future workflows, and assists senior staff in conducting interviews, performing data analysis, and preparing client deliverables.

EXPERIENCE HIGHLIGHTS:

CLEARWATER, FL: PLANNING AND DEVELOPMENT BUSINESS PROCESS STUDY

On this project, Joe:

- Administered the customer survey and facilitated focus groups.
- Worked with City staff to develop workflow diagrams that represent the Department's key processes (permit applications, zoning approvals, etc.).
- Analyzed workload and timeline data for staffing analysis.

ROCKLIN, CA: COMMUNITY DEVELOPMENT DEPARTMENT ORGANIZATIONAL ASSESSMENT

Joe supported senior project team members in the following areas:

- Facilitated the process mapping workshops to document development review, permitting, and inspection processes.
- Responsible for the customer survey outreach and analysis. Identified key strengths and challenges with the current operational approaches.
- Conducted a comparative survey with eight peer communities to understand their organizational structure, staffing approaches, and technology utilization.

ROLE ON THIS ENGAGEMENT:

Joe will be responsible for process improvement and customer input.

RELEVANT CLIENTS:

- CA Redondo Beach
- CA Redwood City
- CA Rocklin
- CA San Bernadino
- CA San Dimas
- CO Greeley
- FL Clearwater
- FL Dunedin
- FL Naples
- FL St. Petersburg
- IA Cedar Rapids
- NV Henderson
- TN Knoxville
- TX Dallas
- TX Prosper
- WA Richland
- WA Snohomish

YEARS OF EXPERIENCE:

4

EDUCATION:

BA, Professional and Technical Communication, University of South Florida

PROFESSIONAL ASSOCIATION:

Florida City County Managers Association

Engaging Local Government Leaders

Society for Technical Communications

STAFF CAPACITY

All proposed staff are available to work on this engagement within the next few weeks. We are finalizing several projects and have sufficient capacity to complete this study. The following table summarizes our team's capacity over the next six months.

Name	Mar	Apr	May	Jun	Jul	Aug
Baggarly	25%	50%	60%	75%	85%	85%
Brekke	50%	65%	75%	90%	90%	90%
Mathiasen	35%	40%	60%	75%	90%	90%
McDonald	30%	30%	30%	30%	30%	30%

SPECIAL QUALIFICATIONS

Matrix Consulting Group sets itself apart in the industry by having senior-level staff involved throughout the engagement. This includes company leadership (Aaron Baggarly) serving as this engagement's project manager and lead analyst. Furthermore, we have a dedicated team of three former local government permitting, planning, and community development directors who are this study's lead/senior analysts. This project team has worked together on dozens of similar engagements since they respectively joined the firm.

WORK SAMPLE

The link below provides access to the final report for the development review process assessment we completed for Knoxville, TN.

<https://drive.google.com/file/d/1jalvGsfLeqt3GrRZpueCm0IQSh1CVj2J/view?usp=sharing>

PROPOSED PROJECT METHODOLOGY

This section of our proposal will provide an overview of the project task plan, methodology, and schedule.

PROJECT TASK PLAN

We propose to conduct the requested scope items in the RFP and have summarized how our proposed task plan aligns with the City’s requested tasks and deliverables.

Matrix Task	Task from Request for Proposal
1. Project Initiation and Current State Assessment	2.A: Comprehensive Assessment and Document Current State 5.B.4.1: Project Inception Report
2. Current State Assessment	2.A: Current State Assessment Report, including current process diagrams. 5.B.4.2 Current State Assessment Report, including current process diagrams. 2.B: Identify Pain Points and Bottlenecks
3. Customer Survey and Focus Groups	2.G.3: Customer Satisfaction Input
4. Best Practices Assessment	2C: Benchmark Against Best Practices 5.B.4.3: Benchmarking Report
5. Staffing and Operational Analysis	2D: Develop Recommendations 2.G.2: Process Efficiency 5.B.4.4: Recommendation Report
6. Draft & Final Reports	5.B.4.4: Recommendation Report 5.B.4.5: Final Presentation

The following outlines our task plan to meet the project goals and outcomes.

TASK 1: PROJECT INITIATION AND KICKOFF INTERVIEWS

Upon receiving notice to proceed, the Matrix project team will hold a project initiation meeting with key Development Services Department staff to discuss the parameters and reason for the operational efficiency study of the North Richland Hills’ permitting process. The primary intent of the project kick-off meeting is to establish a positive connection between the project team and City staff to ensure a productive relationship throughout the assessment. The following tasks will be completed:

- We will meet with the City's Project Lead/Team to review administrative aspects of the project and ensure mutual understanding of timelines, key personnel, status meetings, and deliverables.
- Preliminary request for data. We will discuss with the City's project team to develop a preliminary list of available data and submit an initial data collection list.
- Identify the first round of staff and leadership interviews and schedule a project kick-off meeting (if desired) with key department staff.
- Establish regularly scheduled status meetings (proposed bi-weekly) to review the project timeline and interim deliverables.
- Create a project inception report outlining our understanding, methodology, and final project schedule.

TASK RESULT

Introduction between project team and City staff, confirm project goals and schedule, identification of first round of staff interviews, and a preliminary data collection list.



TASK 2: DEVELOP AN UNDERSTANDING OF THE CITY'S PERMITTING PROCESS THROUGH STAFF INTERVIEWS, WORKFLOW DIAGRAM WORKSHOPS, AND DEVELOP A CURRENT STATE ASSESSMENT.

To evaluate the City's permitting operations and processes, we need to develop an in-depth understanding of the key issues impacting and shaping service requirements. To develop this perspective, if desired, we will interview representatives from the Development Services staff, staff from other relevant departments/divisions involved in the permitting review processes, City management, and appointed/elected officials. These interviews will focus on exploring issues and attitudes in the following areas:

- Goals and objectives regarding the delivery of services in each operational functional area.
- Adequacy of service levels and perceived gaps in existing levels of service.
- Organizational changes that have been made in the past several years and perceptions of the impacts of these changes.
- Adequacy of software and technology and the extent to which staff and managers utilize these systems and the data output to make meaningful managerial, operational, scheduling, and staff allocation decisions.
- Outsourcing philosophy of the City, the services that are currently outsourced, and additional options.
- Identify the relevant workload for staff involved in the review process and current challenges.

Next, we will develop a detailed description of the permitting services provided by the City. We will focus on how services are delivered, staffed, and managed. The development of this detailed description will be based on interviews as well as on the collection of operating information and data, including the following:

- The current organization of the development functions including:
 - The structure and functions of each division and unit.
 - The staffing levels of each division.
 - The basic job responsibilities of staff.
- Documentation of all key operations, including:
 - Service scope and content.
 - How staff are scheduled and deployed.
 - Workload data.
 - Adopted service levels.
 - The extent of contracted services by type, size, and cost.
- Documentation of the software and technology currently used, including:
 - Current permitting, review, and inspection software systems.
 - Geographical information systems.
 - Information Technology roles and responsibilities.
 - Use of hand-held/mobile devices for reporting work in the field.
 - Understand pending technology changes, if any.
- Documentation of management systems available to support departmental operations, including:
 - Organizational business functions and procedures; and
 - Performance monitoring systems.
- Document current performance targets related to major service areas within the development review process, such as turnaround times for permitting processes, response times for complaints, percentage of inspections completed within 24 hours of the request, etc.
- Document the current coordination mechanism and procedures to coordinate inter-departmental delivery of services.

In addition to developing an understanding of the current operations of the various teams involved in the permitting process, the project team will develop workflow diagrams of the City's primary permitting and development processes. We will develop current state workflows that show the existing processes with information detailing which departments/divisions and staff are involved in each process, whether each step is manual or automated, the handoffs between individuals and departments/divisions, the data required from each step, and the timeframe for completion. The process mapping will display all applicable touch points between the applicant and city staff and how technology is integrated into the process.

As a result of this task, the City will be provided with detailed process flow diagrams for their primary permitting processes. These diagrams will provide both staff and applicants with the ability to clearly understand current development-related processes. Diagrams will be utilized to identify potential chokepoints (separate tasks) in the process and future recommendations to create a more efficient process for staff and the customer.

TASK RESULT

A current state assessment summarizing permitting operations, staffing, technology, and workload for each functional area of the City's permitting process. "As is" workflow process diagrams will be included as part of the current state assessment.

TASK 3: ASSESS CUSTOMER SATISFACTION WITH THE PERMITTING PROCESS.

To ensure that the project team has a good understanding of prior customers' perspectives of the City's permitting process, we will utilize two techniques to obtain input:

- Conduct an online survey of recent applicants to obtain the widest possible input on development review and permitting processes. This survey will be distributed electronically to prior customers of the City over the last 2 – 3 years and include questions regarding the efficiency, effectiveness, and clarity of current development review processes and request input on the current strengths and improvement opportunities for existing processes and procedures.
- Conduct four in-person focus group meetings with prior customers to elicit more detailed and specific information regarding the city's processes. Each focus group would consist of individuals recently conducting business with the City and representatives from professional trade groups (e.g., Northeast Tarrant Chamber of Commerce, Greater Fort Worth Builders Association, local AIA chapter, etc.).

These efforts will be designed to understand the customer's perceptions of the City's permitting process, the associated challenges and strengths of the current service environment, and identify potential opportunities for improved service provision.

TASK RESULT

Summary of customer feedback from the online survey and in-person focus group meetings identifying key trends and issues related to the City's permitting process.

TASK 4: COMPARE NORTH RICHLAND HILLS' PERMITTING OPERATIONS TO INDUSTRY BEST PRACTICES AND OTHER METROPLEX MUNICIPALITIES.

The purpose of this task is to evaluate the permitting services provided by North Richland Hills related to permit, application review, and inspection processes, organization, staffing, and operational activities in the context of best management practices in the profession. Each functional area would be assessed against a unique set of management practices. We will evaluate the programs and practices of the various disciplines involved in permitting services in topic areas such as staffing, management, strategic planning, processes utilized, employee training, communication, timelines, technology, educational materials, City website, etc. To accomplish this, we would undertake the following:

- **Best Practice Assessment:** Evaluate the services provided by the departments regarding organization composition, roles/responsibilities, technology, staffing approaches, and operational activities in the context of best management practices in the profession. When conducting the best management practices assessment, each operational area will be assessed against a unique set of management practices. We will evaluate the programs and practices of the various divisions in areas such as staffing, management and strategic planning, process, training, communication, timelines, technology, and funding sources.

The best practice assessment will identify areas where the City meets or exceeds best practices. More importantly, it will identify areas where current gaps and shortcomings exist and present opportunities for improving existing operations. The assessment will identify major operational issues and include a preliminary workload and process data analysis.

- **Comparative Assessment:** The project team will also conduct a comparative assessment with five similar municipal organizations in the Metroplex. We will compare the service delivery model, organizational structure, supervisor ratios, performance timelines, technology utilization, and other organizational characteristics to current operations in North Richland Hills. The comparative survey will provide insight into how the City compares to other city organizations and identify areas for further inquiry and potential modification to enhance the efficiency and effectiveness of service delivery utilization.

A summary of the findings from these two efforts will be developed as an interim deliverable and shared with the City's project committee. The results of this task will provide an understanding of current strengths, a listing of potential improvement opportunities for further evaluation in later tasks, and a comparative assessment of NRH's operations to those of other Metroplex communities.

TASK RESULT

An evaluation of the City's permitting practice compared to industry best practices and comparable jurisdictions and a summary of issues identified from this assessment.

TASK 5: EVALUATE PERMITTING AND INSPECTION OPERATIONAL PRACTICES, PROCESSES, TECHNOLOGY, CUSTOMER SERVICE, AND STAFFING APPROACHES.

This task involves an evaluation of workflows, workload, staff utilization, work practices, customer service (internal and external), technology use, staffing, and organizational structure of North Richland Hill's permitting process. We will address these issues through these approaches:

- **Analyze the various permitting-related work processes.** The project team will evaluate current processes, laws, and regulations to identify issues driving any inefficiencies in staffing, processes, or other issues that impact the efficiency of the various plan review, permitting, and inspection processes. This task may result in alternative process approaches that will streamline current review, permitting, and inspection processes and be built into future recommendations. The project team will develop "to be" workflow flowchart diagrams for major process modifications. These diagrams may be used as part of customer information / educational materials.
- **Evaluate the adequacy of major work practices utilized by each permitting function.** This analysis will include a review of the workload for 2 – 3 years for each permitting functional area. Additional analysis will focus on identifying opportunities to streamline internal processes, assignments, and work practices to increase productivity and/or enhance their effectiveness. Also, we will identify the degree to which key tasks are not being accomplished due to a lack of staff and assess the extent to which tasks could be absorbed through streamlining of business processes. Additional analysis would focus on defining specific roles of departments/staff in the processes.
- **Analyze responses and review timeliness.** The focus of this task is for the project team to conduct an in-depth analysis of response and review timeliness. The project team will evaluate the workloads of the previous three years to understand processing timelines by application type. The analysis will include the timeliness of processing applications (by review entity/function), conducting initial and subsequent application reviews, issuing permits (or approval), scheduling and completing inspections, and finalizing certificates of occupancies. Also, we will identify where timelines do not comply with established performance metrics and adopt local and state ordinances, regulations, statutes, and/or industry best practices. This exercise will also identify any discrepancies in performance between review entities. Recommendations may include the identification of new performance metrics to align with the City's service level expectations and resource availability.
- **Evaluate customer service, including internal and external customers.** The project team will analyze the level of service provided to both internal and external customers. The project team will address inter-departmental coordination related to the permitting process and the approaches used for public outreach and education. The analysis will also include assessing how to improve coordination and communication between review entities, reviewing the information provided on the City's website, ensuring ease of application submittal/inspection requests, and determining the potential impact of alternative operational approaches for customers.
- **Evaluate current technology systems.** This task will focus on understanding and assessing current technology systems utilized by the City. The project team will evaluate the current permitting software suite (Tyler Permitting & Licensing), the degree to which GIS/AI is implemented and utilized, how mobile devices are used in the field (e.g., tablets for inspectors), and the degree to which current

systems result in efficient information-sharing and elimination of duplicative input. We will also evaluate how proposed changes to the use of technology may impact efficiencies and operations. This analysis will include all aspects of the external and internal processes and the technology that supports permit submittal, routing, plan review, fee determination/collection, permit issuance, inspection request, and completion. Also, we will identify current issues related to accessibility and training associated with the use of technology.

- **Policy and procedure assessment.** We will evaluate the various permitting policies to ensure they appropriately allocate decision-making authority and are being implemented. The evaluation would include assessing the effectiveness of the current policies to ensure compliance with all adopted policies, procedures, ordinances, state statutes, and directives. We would specifically review the policies and processes to ensure consistency in their application and that employees are held accountable.
- **Evaluate the skill mix of current staff and determine staffing resource needs.** Our project team will evaluate the adequacy of staffing levels to conduct historical workload needs. In this analysis, we will evaluate whether the staff possesses the required skills to perform assigned tasks and the total number of in-house and/or contracted staff to complete the current workload within the adopted timelines. Staffing level analysis will be based on different service level parameters desired by the City. Staffing needs will be provided by position classification and include internal and contracted professional, technical, and administrative positions. This will also involve evaluating your existing building permitting and potential service level and staffing adjustments.

At the conclusion of this task, we will have evaluated all aspects of the permitting and inspection processes and operations, including operational practices, processes, customer service, service levels, technology, work activities, and staffing, to identify improvement opportunities and recommendations.

TASK RESULT

A summary of the identified improvement opportunities and proposed adjustments in processes, work practices, customer service, technology utilization, customer service, operations, staffing levels, and policies.

TASK 6: EVALUATE THE FISCAL IMPACT OF RECOMMENDATIONS AND DEVELOP AN IMPLEMENTATION PLAN

This task will evaluate the fiscal impact of each recommendation and implement the study's recommendations. For each recommendation, the project team will conduct a thorough cost analysis (if applicable). This financial analysis will evaluate the recommendation's cost (or savings) and identify potential funding or revenue sources (e.g., user fees, general fund, technology fee, etc.) for the one-time expenditure and recurring expense associated with successful implementation.

For this study to be successful, it is important to develop a realistic implementation plan that is prioritized and includes actionable items, including the allocation of responsibility and accountability and

the adoption of time frames. To develop this implementation plan, we propose sharing the draft recommendation results with staff through a workshop. This workshop will help build buy-in from staff, receive feedback on their perceptions of the recommendations, and allow them to provide feedback on their recommendation. We will use the outcomes of this workshop to develop the framework for recommendation priority levels and timelines.

After compiling staffs' prioritized recommendation list, the project team will work with the City's project steering committee to (1) prioritize the recommendations, (2) develop timelines for implementation by assigning either a short-, mid-, or long-term timeframe, and (3) identify the responsible party for implementation (elected officials, city management, department management).

TASK RESULT

Conduct a fiscal analysis for the study's recommendations and develop an action plan to guide the implementation of the study's recommendations.

TASK 7: DEVELOP DRAFT AND FINAL REPORTS

Once the work tasks noted above have been completed, our analysis, findings, and implementation plan will be compiled into a draft and final report. The draft report will contain the following elements:

- An executive summary of the study.
- Final analysis of the customer survey and focus group meeting feedback.
- Final best practices assessment analysis.
- Current and recommended process diagrams.
- Analysis of historic workload trends, performance metrics, and impediments to the current process.
- Recommendations to improve the current approach to development review and identify improvement opportunities relating to service philosophies and commitments, staffing required given these commitments, and managerial and operational practices (including policies) for improved service delivery.
- Evaluation of technology and recommendations to improve efficiencies.

Once the City's team has reviewed the draft project report and implementation plan, we will make revisions, as needed, and finalize the report.

We will be available to present our findings, recommendations, and implementation plans to City Management, City Council, and other key staff members involved.

TASK RESULT

Compile the draft report that includes findings, analysis, recommendations, and fiscal analysis. Incorporate an implementation plan that includes a timeline, cost, and responsible parties. Present the study's results to City management and City Council.

METHODOLOGY AND TOOLS

This section includes an overview of our project methodology.

METHODOLOGY

Our philosophy in providing consulting services is to provide a customized approach to address our client's unique issues and needs in a fact-based manner utilizing our proven methodologies and analytical approaches as summarized in the following graphic:

- 1 A principal of the firm is involved in every aspect of each study. For this engagement, Aaron Baggaly, AICP, Vice President, will serve in this role as the project manager and lead analyst.
- 2 We approach our projects by gaining a firm grounding in formal and fact-based analytical methodologies.
- 3 Our projects are characterized by extensive input and interaction between the consultants and our clients' staff, management, and policy makers. This study will also include engagement with staff and past customers.
- 4 We recognize that successfully serving clients requires more than simply providing the right answers. We provide our clients with practical solutions for implementing change.
- 5 We engage regularly with our clients to ensure that the project remains on time, the schedule is maintained, and we are accessible when needed.

Our place in the government consulting industry is based on our experience and tailored approach to meeting each client's unique needs.

PROJECT MANAGEMENT AND CLIENT INTERACTION

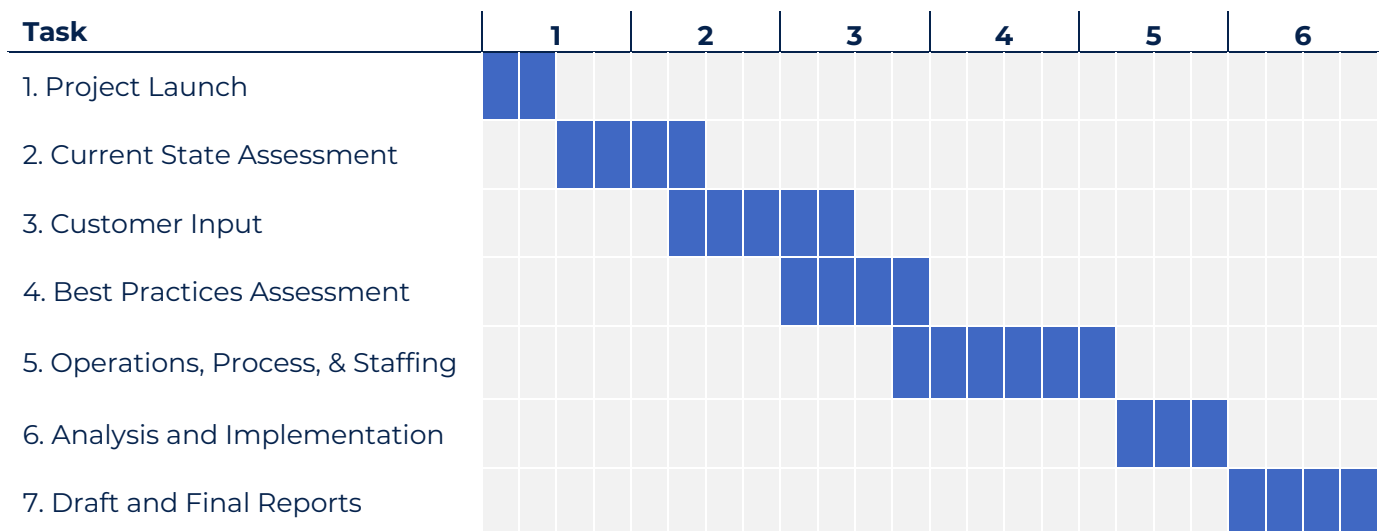
We believe strongly in effectively managing each consulting engagement. As a result, we utilize formal project management techniques in our studies. These techniques include:

- All project work activities are defined in advance and tied to each project team member, as well as deliverables, schedule, and budget.
- Project team and client expectations and results are managed by developing and utilizing formal project schedules and reporting tools, and frequent review meetings are conducted with clients to review interim deliverables.
- Quality control measures include a project executive review of all interim and final products before they are delivered to the client.
- Bi-weekly (or alternative schedule) meetings with the City’s project manager and/or project steering committee.

We recommend creating a project steering committee to work with us on this project. This committee would review our findings, conclusions, and recommendations by reviewing each interim deliverable. We would conduct regularly scheduled progress meetings to report progress to date, problems or obstacles encountered, and planned project activities.

PROPOSED SCHEDULE

The chart below shows our proposed timeline for completing this project over six months. We will finalize the project schedule with the City upon notice to proceed to ensure we meet their needs.



All proposed timelines can be adjusted based on City staff priorities, preferences, and requirements. We can begin work within two weeks of receiving a notice to proceed.

PRICE

We propose to conduct this engagement with a not-to-exceed price of **\$59,970**. The following table summarizes our proposed price by task.

Task	Project Manager / Lead Analyst	Senior Analyst (2)	Analyst	Total Hours	Total Fee
1 Project Launch	4	6	2	12	\$2,330
2 Current State Assessment	12	24	24	60	\$10,920
3 Customer Input	4	16	16	36	\$6,320
4 Best Practices Assessment	8	20	12	40	\$7,340
5 Operation, Process, & Staffing Analysis	16	48	16	80	\$14,800
6 Fiscal Analysis & Implementation Plan	8	8	8	24	\$4,600
7 Draft and Final Reports	12	26	8	46	\$8,710
Total Hours	64	148	86	298	
Hourly Rate	\$240	\$175	\$160		
Total Professional Fees	\$15,360	\$25,900	\$13,760		\$55,020
Travel Expenses					\$4,950
Total Project Cost					\$59,970

We are open to alternative price structures for conducting this audit.

We have also submitted a consolidated option with reduced pricing should we be awarded multiple projects (fleet, permitting, IT) with the City.

CITY OF NORTH RICHLAND HILLS

Thursday, February 6, 2025**RFP # 25-012 - PERMITTING PROCESS OPERATIONAL EFFICIENCY AUDIT****ADDENDUM ONE:**

- 1) The deadline for this RFP has been extended to 10:00AM (CST) Wednesday, February 19, 2025.
- 2) The City has simultaneously released three RFPs to provide similar efficiency audit services for Information Technology Operations, Fleet Operations, and Development Service Permitting Process. The City has received inquiries regarding the submission of consolidated proposals encompassing all three RFPs. The City will consider such consolidated proposals.

Proposal and Pricing Requirements:

Individual RFP Proposals: All firms must submit a complete proposal and separate pricing for each individual RFP listed above.

Consolidated Proposals: Firms may also submit a consolidated proposal that covers all three RFPs. If a consolidated proposal is submitted, it must include:

- Separate pricing and timeline for each individual RFP (as required above).
- Combined pricing and timeline(s) for two or more RFPs.
- Firms providing consolidated proposals may increase the maximum page limit by three pages to allow for additional information. For example, each proposal has a maximum page limit of 25. If a firm is submitting a consolidated proposal for all three efforts, the total page limit would be $75+3=78$ pages to provide sufficient room for an explanation of the economies of scale associated with the consolidation, and to briefly describe how it would be managed.

Firms submitting a consolidated proposal should clearly delineate the individual and combined pricing within their submittal to avoid confusion during the evaluation process.

All other terms and conditions of the original RFPs remain unchanged. This Addendum shall be considered an integral part of the original RFP documents.

THIS ADDENDUM MUST BE SIGNED AND RETURNED WITH YOUR RFP RESPONSE.

Acknowledge receipt of this addendum by inserting this page with your RFP response.

This addendum form is a part of the contract documents, and it so modifies, amends, deletes and/or adds to the original RFP document.

Name and Address of Company:

Matrix Consulting Group, Ltd.
1875 S Grant Street #960
San Mateo, CA 94402

Authorized Representative:

Signature: 

Name: Alan Pennington

Title: President

Phone: 650-858-0507

Email: apennington@matrixcg.net