



City of Aurora, IL
Purchasing
Jolene Coulter, Director of Purchasing
44 E Downer Place, Aurora, IL 60502

[RAFTELIS FINANCIAL CONSULTANTS, INC.] RESPONSE DOCUMENT REPORT

RFP No. 26-001

Strategic Planning

RESPONSE DEADLINE: March 31, 2026 at 5:00 pm

Report Generated: Thursday, June 11, 2026

Raftelis Financial Consultants, Inc. Response

CONTACT INFORMATION

Company:

Raftelis Financial Consultants, Inc.

Email:

vendor@raftelis.com

Contact:

David George

Address:

227 W. Trade Street
Suite 1400
Charlotte, NC 28202

Phone:

N/A

Website:

www.raftelis.com

Submission Date:

Mar 31, 2026 2:24 PM (Central Time)

ADDENDA CONFIRMATION

Addendum #1

Confirmed Mar 31, 2026 2:18 PM by David George

Addendum #2

Confirmed Mar 31, 2026 2:18 PM by David George

QUESTIONNAIRE

1. Technical Proposal*

Pass

See Submittal Content Section for more information.

Pricing shall not be mentioned anywhere in the body of the Technical Proposal.

00393IL26-01_Proposal_Final.pdf

2. Cost Proposal*

Pass

See Submittal Content Section for more information.

00393IL26-01_Cost_Proposal_Final.pdf

3. Standard City of Aurora Contract*

Pass

Please download the below documents, complete, and upload.

- [Sample Standard Contract RF...](#)

Sample_Standard_Contract_Signed.pdf

4. Contact Information*

Pass

Please download the below documents, complete, and upload.

- [COA Contact Information.docx](#)

80b79c56-f7ba-4b2f-9f3c-a7c127d2a594_COA_Contact_Information_(1).docx

5. References*

Pass

Sufficient references of all like public and/or private agencies must be presented below. Listing must include company name, contact person, telephone number and date purchased. All Proposers, as a condition of and prior to entry into a contract, agree that a complete background investigation of the principals of the Proposer and all employees who will work on the project may be made. Proposers agree to cooperate with the appropriate City of Aurora personnel to supply all information necessary to complete these investigations. The City of Aurora in its complete discretion may disqualify any Proposer, including low Proposer, and may void any contract previously entered into based on its background investigation.

City of Elgin IL

Reference: Rick Kozal, City Manager

P: 847.931.5590 / E: citymanager@cityofelgin.org

Award Date: 2022

Village of Lisle IL

Reference: Jack Knight, Current Village Manager of La Grange (former Assistant Village Manager of Lisle)

P: 708.579.2300 / E: jknight@lagrangeil.gov

Award Date: 2021

Village of La Grange IL

Reference: Jack Knight, Current Village Manager of La Grange (former Assistant Village Manager of Lisle)

P: 708.579.2300 / E: jknight@lagrangeil.gov

Award Date: 2023

City of Joliet IL

Reference: Beth Beatty, City Manager

P: 815.724.3730 / E: bbeatty@joliet.gov

Award Date: 2024 and 2026

City of Cedar Falls IA

Reference: Danny Laudick, Mayor

P: 319.243.5632 / E: danny.laudick@cedarfalls.com

Award Date: 2025

City of Morgantown WV

Reference: Emily Muzzarelli, Assistant City Manager

P: 304.284.7406 / E: asstcitymanager@morgantownwv.gov

Award Date: 2024

6. Sub-Contractor List

Pass

Please provide the following information for each subcontractor:

Company:

Address:

City, State, Zip:

Phone Number:

Contact Person:

N/A

7. Eligibility*

Pass

By signing this Proposal, the Proposer hereby certifies that they are not barred from bidding on this Proposal as a result of a violation of Article 33E, Public Bids of the Illinois Criminal Code of 1961, as amended (Illinois Compiled Statutes, 720 ILCS 5/33E-1).

Confirmed

8. Proposer's Certification*

Pass

I/We hereby certify that:

- A. A complete set of proposal papers, as intended, has been received, and that I/We will abide by the contents and/or information received and/or contained herein.
- B. I/We have not entered into any collusion or other unethical practices with any person, firm, or employee of the City which would in any way be construed as unethical business practice.
- C. I/We have adopted a written sexual harassment policy which is in accordance with the requirements of Federal, State and local laws, regulations and policies and further certify that I/We are also in compliance with all equal employment practice requirements contained in Public Act 87-1257 (effective July 1, 1993) and 775 ILCS 5/2-105 (A).
- D. I/We operate a drug free environment and drugs are not allowed in the workplace or satellite locations as well as City of Aurora sites in accordance with the Drug Free Workplace Act of January, 1992.
- E. The Proposer is not barred from bidding on the Project, or entering into this contract as a result of a violation of either Section 33E-3 or 33E-4 of the Illinois Criminal Code, or any similar offense of "bid rigging" or "bid rotating" of any state or the United States.
- F. I/We will abide by all other Federal, State and local codes, rules, regulations, ordinances and statutes.

Confirmed

9. Proposer's Tax Certification*

Pass

The Proposer's Executing Officer, being first duly sworn on oath, deposes and states that all statements made herein are made on behalf of the Proposer, that this respondent is authorized to make them and that the statements contained herein are true and correct.

Proposer deposes, states and certifies that Proposer is not barred from contracting with any unit of local government in the State of Illinois as result of a delinquency in payment of any tax administered by the Illinois Department of Revenue unless Proposer is contesting, in accordance with the procedures established by the appropriate statute, its liability for the tax or the amount of the tax, all as provided for in accordance with 65 ILCS 5/11-42.1-1.

Confirmed

10. Additional Information

No response submitted

City of Aurora

Strategic Planning

RFP NO. 26-001 / MARCH 31, 2026 / TECHNICAL PROPOSAL





Giving back

The Raftelis Charitable Gift Fund seeks to make a difference on issues that matter to our clients and employees by helping build sustainable, inclusive communities locally and worldwide. We do this by allocating company profits and employee contributions of time and money. We support organizations that:

- Promote efficient, sustainable resource use
- Advance diversity, equity, and inclusion within the public sector
- Invest in access to clean water and sanitation
- Help vulnerable communities by addressing affordability issues



Raftelis is registered with the U.S. Securities and Exchange Commission (SEC) and the Municipal Securities Rulemaking Board (MSRB) as a Municipal Advisor.

Registration as a Municipal Advisor is a requirement under the Dodd-Frank Wall Street Reform and Consumer Protection Act. All firms that provide financial forecasts that include assumptions about the size, timing, and terms for possible future debt issues, as well as debt issuance support services for specific proposed bond issues, including bond feasibility studies and coverage forecasts, must be registered with the SEC and MSRB to legally provide financial opinions and advice. Raftelis' registration as a Municipal Advisor means our clients can be confident that Raftelis is fully qualified and capable of providing financial advice related to all aspects of financial planning in compliance with the applicable regulations of the SEC and the MSRB.

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COVER TRANSMITTAL LETTER

March 31, 2026

Brian Caputo, Chief Operating Officer
City of Aurora
44 E Downer Place, Aurora, IL 60505

Subject: Proposal for Strategic Planning (RFP No. 26-001)

Dear Mr. Caputo:

We are excited to submit this proposal to assist the City of Aurora (City) with the creation of a strategic plan. Our focus has always been to help local government and utility clients solve their financial, organizational, and technology challenges.

We understand that you are seeking assistance in developing a strategic plan that will chart a 5–7-year vision and action plan for the organization. You seek to partner with a consultant who can facilitate a process with the administration and organization and translate this into a shared vision and strategic plan, including goals and action plans to inform the City's programming and budget for the coming years.

We believe Raftelis offers the City some distinct advantages for this work:

- Our proven methods of engagement and facilitation will lead to a sustainable plan that provides you with a vision, mission, measurable goals, and an action plan with key performance indicators.
- We are passionate about public sector strategic planning, which drives us to use innovation and creativity throughout the project; as former local government leaders, we understand your context and constraints.
- Our facilitators are skilled and in tune with stakeholder groups; we respect and encourage all perspectives.
- Our deliverables are useful and engaging, and unique and creative graphics are used to keep documents concise with a focus on internal and external communication.

We have had significant success working with elected officials, department leadership teams, and staff to identify priorities for an organization and achieve consensus. We are confident our approach will provide the City with the direction it seeks for the future of your organization. We look forward to the opportunity to serve the City of Aurora. Please contact me with any questions. I am authorized to represent the firm. Proof of signature authority is included in the Appendix. Raftelis is registered with the Illinois Secretary of State under registration number 7156-304-9.

Sincerely,

Raftelis Financial Consultants, Inc. (DBA Raftelis)



Michelle Ferguson, *Executive Vice President*

P: 513.221.0500 / E: mferguson@raftelis.com

Address: 19 Garfield Place, Suite 5000, Cincinnati, OH 45202 / **State of Incorporation:** North Carolina

ORGANIZATION, PERSONNEL AND STAFFING

Project Team

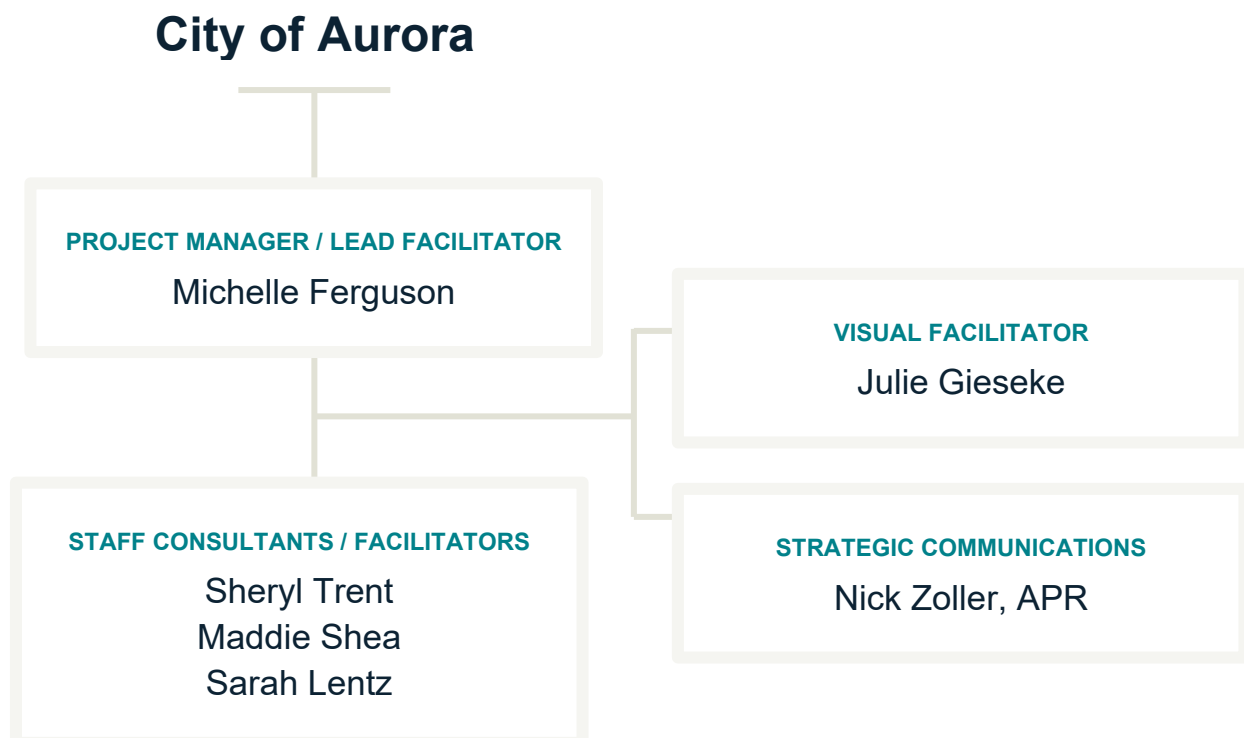
WE HAVE DEVELOPED A TEAM OF CONSULTANTS WHO SPECIALIZE IN THE SPECIFIC ELEMENTS THAT WILL BE CRITICAL TO THE SUCCESS OF THE CITY'S PROJECT.

Raftelis has developed a team of consultants who specialize in the specific elements that will be critical to the success of the City's project. Our project team is made up of senior-level consultants with direct local government experience. What sets our project team apart is our ability to explore and relate to local community values while at the same time investigating realistic approaches for cost-effective solutions that will work in your unique context.

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

Because we possess the in-house qualifications and experience necessary for this work, no subconsultants are proposed. All team members are Raftelis employees.

An organizational chart of our project team members is as follows. Resumes for each team member, including roles on your project, are provided on the following pages.



Michelle Ferguson

PROJECT MANAGER / LEAD FACILITATOR Executive Vice President

ROLE

Michelle will manage the day-to-day aspects of the project ensuring it is within budget, on schedule, and effectively meets the City's objectives. She will also lead the consulting staff in conducting analyses and preparing deliverables for the project. Michelle will serve as the City's main point of contact for the project.

PROFILE

Michelle has 28 years of management experience with and for local governments across the country. As Organizational Excellence leader for Raftelis, Michelle oversees the firm's management consulting services of organizational assessment, strategic planning, executive services, technology solutions, and strategic communications. As a consultant, she has spearheaded the work of over 200 local government reviews in some of the foremost governments across the country. Michelle has completed detailed organizational reviews of entire jurisdictions and recommended improvements to the structure, staffing, and processes within departments of all sizes. Specific department reviews have included development review, parks and recreation, public works, human services, human resources, capital budgeting, and finance.

As a Lean certified professional, Michelle excels at helping local governments continuously improve and rely on data to make informed choices about services to the public. She is skilled in project management, process improvement strategies, performance measurement, consent building, and public process design. Additionally, she has provided customized training in the development and use of performance measures to assist numerous organizations continuously improve service delivery.

Michelle is also a skilled facilitator, able to bring diverse groups of people together to articulate shared visions and priorities. She has led strategic planning engagements at the community, organizational, and department levels, and she has facilitated numerous staff and governing body retreats.

Michelle began her consulting career in 2005 following ten years of direct experience in local government management, which included serving as assistant county manager in Arlington County, Virginia. During her tenure with Arlington County, Michelle oversaw the daily management and implementation of the County's capital program. She also led the organization-wide performance measurement initiative establishing their Balanced Scorecard. Before Arlington County, Michelle served as assistant city manager in Overland Park, Kansas. Michelle earned a bachelor's degree in political science from Loyola University-Chicago and a master's degree in public administration from the University of Kansas. She is a member of the International City/County Management Association. She also served as the president of the Metropolitan Association of Local Government Assistants in Washington, D.C., and has presented at state and national conferences on topics such as strategic planning, effective governing bodies, and council-staff relations.



Specialties

- Organizational assessment
- Staffing analysis
- Process improvement
- Performance management
- Capital planning
- Strategic planning
- Facilitation
- Community engagement

Professional History

- Raftelis: Executive Vice President (2024-present); Vice President (2021-2023), Senior Manager (2020-2021); Organizational Assessment Practice Leader, The Novak Consulting Group (2009-2020)
- Management Partners: Senior Management Advisor (2005-2009)
- Arlington County, Virginia: Assistant County Manager (2002-2005)
- City of Overland Park, Kansas: Assistant City Manager (1996-2002)

Education

- Master of Public Administration - University of Kansas (1998)
- Bachelor of Arts in Political Science - Loyola University, Chicago (1996)

Certifications

- Lean Certified

Professional Memberships

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

Julie Gieseke

VISUAL FACILITATOR Visual Facilitator

ROLE

Julie will use visual facilitation to capture participants' dialogue, discussion, and ideation by drawing large visual maps in real time, which helps connect ideas, track content, and synthesize their work.

PROFILE

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

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

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

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



Specialties

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

Professional History

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

Education

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

Certifications

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

Professional Memberships

- International Forum of Visual Practitioners

Nick Zoller APR

STRATEGIC COMMUNICATIONS Senior Manager

ROLE

Nick will provide services for strategic communications and stakeholder engagement for the project.

PROFILE

Nick is a seasoned communications executive and strategist with 16+ years of experience leading high-profile public sector and consulting engagements. As the Strategic Communications Practice Leader at Raftelis, he helps local governments and utilities strengthen public trust, drive effective engagement, and improve outcomes through strategic, data-informed communications. He advises executive leaders, elected officials, and communicators on high-impact issues, guiding them through crises, campaigns, and organizational change. Previously, as Senior Director of Communications for the City of Savannah, Nick led executive messaging, crisis response, and citywide education initiatives. He excels at developing integrated storytelling strategies that build credibility, shape public opinion, and deliver measurable impact. Nick is also passionate about mentoring teams and advancing best practices across the profession.

As the leader of Raftelis' Strategic Communications practice, Nick manages a team of communications professionals. He provides counsel to government and utility clients on high-stakes issues, engagement strategy, and campaign design. He also develops best practices for effective communications and public trust-building initiatives.



Specialties

- Strategic communications planning
- Stakeholder engagement & public participation
- Crisis & issues management
- Brand & reputation management
- Media relations & spokesperson training
- Digital & social media strategy
- Community outreach & event management
- Performance measurement & analytics
- Executive communications coaching
- Team building & development

Professional History

- Raftelis: Senior Manager/Strategic Communications Practice Leader (2025-present)
- City of Savannah, GA: Senior Director of Communications/Chief Communications Officer (2019-2025)
- Marion County, FL: Director of Public Relations (2016-2019)
- Pinellas County, Florida: Public Information Officer – Public Works & Utilities Communications Coordinator (2014-2016)
- Independent Consultant: Communications & Media Relations (2009-2014)

Education

- M.S., Mass Communication - Florida International University (2016)
- B.S., Public Policy & Administration - St. Petersburg College (2015)

Certifications

- APR – Accreditation in Public Relations, Public Relations Society of America (2018)

Professional Memberships

- Public Relations Society of America (PRSA)
- National Association of Government Communicators (NAGC)

Sheryl Trent

STAFF CONSULTANT / FACILITATOR Principal Consultant

ROLE

Sheryl will work at the direction of Michelle in facilitating workshops and meetings, conducting interviews, preparing recommendations, and drafting deliverables.

PROFILE

Sheryl has over 35 years of experience as a local government employee, consultant, and practitioner. That experience included serving as a Town Manager, Assistant City Manager, Assistant County Manager, and numerous department head roles; leading strategic plans, master plans, comprehensive plans, and economic development efforts. Her unique background allows her to clearly understand the constraints, frustrations, and operating environments of federal and state agencies, cities, counties, special districts, community foundations, departments and divisions of government, and community nonprofits.

With extensive experience as a facilitator for long-range strategic plans, organizational assessments, and high-performing team building, she collaboratively creates results based on the values of client-centric service, creating deliverables customized to each client and exceeding expectations. As a Certified Master Facilitator™ and Certified Master Learning Facilitator™, she is known for creating fun, engaging meetings that build consensus and trust. Her work has been featured at conferences and in national magazines and has won awards. She is a nationally recognized speaker on strategic planning, facilitation, and inclusive community engagement issues.

Sheryl is a believer in the practice of facilitation as the basis for building consensus, creating transparency, aligning values, improving communication, and strengthening relationships. She served as the past Chair of the International Institute for Facilitation, the world's leading institution for facilitation certification, research, and innovative learning. She is a member of the Association for Strategic Planning, the International Association of Facilitators, the National Center for Deliberative Debate, and many other professional organizations.



Specialties

- Strategic planning
- Facilitation
- Organizational culture and team building
- Organizational assessment
- Governance strategy and support
- Community engagement

Professional History

- Raftelis: Principal Consultant (present)
- SBrand Solutions: Founder and President (2011-2025)
- City of Evans, CO: Community and Economic Development Director and Executive Director, Urban Renewal Authority (2008-2013)
- Town of Milliken, CO: Town Manager (2005-2008)
- City of Grand Junction, CO: Assistant City Manager (2000-2005)
- Siskiyou County, CA: Assistant County Administrator (1995-1998)

Education

- Master of Public Administration - University of Washington (1992)
- Bachelor of Arts, Political Science - University of Washington (1989)

Certifications

- Certified Master Facilitator
- Certified Virtual Facilitator
- Certified Master Learning Facilitator
- ICMA, CPM (prior)
- Cornell University, Diversity and Inclusion

Professional Memberships

- International Institute for Facilitation (INIFAC) Board Member, Past Chair
- Mid Atlantic Facilitators Network (MAFN)
- International Association of Strategic Planning (IASP)
- International Association of Facilitators (IAF)
- National Center for Deliberative Debate (NCDD)

Maddie Shea

STAFF CONSULTANT / FACILITATOR Consultant

ROLE

Maddie will work at the direction of Michelle in facilitating workshops and meetings, conducting interviews, preparing recommendations, and drafting deliverables.

PROFILE

Maddie has over six years of experience working with local governments in consulting and research roles. She brings expertise in strategic planning, project management, stakeholder engagement, meeting facilitation, and qualitative research. With a keen focus on meeting design, Maddie works with clients to develop effective methods to create spaces that foster collaboration, keep participants engaged, and produce meaningful outcomes.

Since joining Raftelis in 2024, Maddie has served as a dedicated partner to local governments nationwide. She works with local government staff and elected officials to facilitate actionable strategic planning efforts that can gain community buy-in. Maddie is skilled at translating nuanced ideas into actionable next steps and helping clients connect important details with their strategic visions.

In her previous role, Maddie led facilitation and strategy projects across the public sector for municipal, utility, nonprofit, and higher education clients. Her facilitation clients included dozens of municipalities in North Carolina and Virginia, as well as institutions such as Oregon State University, Texas A&M University, and Purdue University. Her prior strategic planning engagements have included work with the several North Carolina municipalities including the City of Hendersonville, Town of Rolesville, and Town of Zebulon Economic Development Department. In addition, she has supported culture and climate assessments for organizations such as Warren County, North Carolina and MCNC.

Previously, Maddie served as a policy fellow with ncIMPACT, a non-partisan policy initiative at the School of Government, where she focused on research and public sector problem-solving. She also served as a research assistant for two years while completing graduate school, contributing to the UNC-Chapel Hill Master of Public Administration program's updated strategic plan. During this time, she also worked closely with local government staff on issues such as drinking water incident response and leadership development programs.

Maddie earned a Master of Public Administration from the University of North Carolina at Chapel Hill and a Bachelor of Advertising from the University of Georgia.



Specialties

- Strategic planning
- Strategy monitoring and implementation
- Community and stakeholder engagement
- Facilitation
- Program implementation
- Organizational assessment
- Process improvement
- Data analysis

Professional History

- Raftelis: Consultant (2024-present)
- Fountainworks: Project Director (2021-2024); Program Coordinator (2020-2021); Contractor (2020)
- North Carolina Rural Center, Thread Capital: Contractor (2020)
- University of North Carolina at Chapel Hill: Research Assistant (2018-2020), Program Fellow, ncIMPACT (2019)
- Project Safe: Administrative Intern (2017)
- Warner Brothers Appraisal: Administrative Assistant (2014-2018)

Education

- Master of Public Administration - University of Carolina at Chapel Hill (2020)
- Bachelor of Arts in Journalism, Advertising - University of Georgia (2017)

Sarah Lentz

STAFF CONSULTANT / FACILITATOR Associate Consultant

ROLE

Sarah will work at the direction of Michelle in facilitating workshops and meetings, conducting interviews, preparing recommendations, and drafting deliverables.

PROFILE

Sarah has over four years of experience working with state and local government in research and programming roles. She brings expertise in economic development, data analysis and visualization, policy research, and survey development. Sarah joined Raftelis in 2025 as a member of the Organizational Excellence and Strategic Planning and Facilitation team.

In her previous role at TeamNEO, a regional economic development organization in Northeast Ohio, Sarah conducted economic, demographic, and industry research to support local governments, businesses, and educational institutions in making strategic decisions on how to grow the region's economy. She led research into workforce migration to identify key groups moving into and out of the region and worked with local government and business organizations to develop strategies to increase talent attraction and retention.

As a graduate student, Sarah served as a Fellow with the Ohio Department of Education & Workforce in the Office of Educator Talent & Leadership and contributed to staff wellness and professional development programming for educators across the state. Her prior work with the Program on Opinion Research and Election Studies at the University of Pennsylvania also includes the creation and analysis of public opinion surveys to understand voter decision making.

Sarah holds a Master of Public Administration from Ohio State University and a Bachelor of Arts in Political Science from the University of Pennsylvania.



Specialties

- Economic development
- Statistical analysis
- GIS analysis
- Data visualization
- Policy research
- Survey development

Professional History

- Raftelis: Associate Consultant (2025-present)
- Ohio Department of Education & Workforce: Graduate Fellow (2024-2025)
- TeamNEO: Senior Research Associate (2022-2023); Research Associate (2021-2022)
- Program on Opinion Research and Election Studies: Research Coordinator (2019-2021)

Education

- Master of Public Administration – Ohio State University (2025)
- Bachelor of Arts in Political Science – University of Pennsylvania (2019)

FIRM QUALIFICATIONS, EXPERIENCE AND REFERENCES

Who is Raftelis

HELPING LOCAL GOVERNMENTS AND UTILITIES THRIVE



Since our founding in 1993, local government and utility leaders have partnered with Raftelis to transform their organizations by enhancing performance, planning for the future, identifying top talent, improving their financial condition, and telling their story. We've helped more than 700 organizations in the last year alone. We provide trusted advice, and our experts include former municipal and utility leaders with decades of hands-on experience running successful organizations. People who lead local governments and utilities are innovators—constantly seeking ways to provide better service to the communities that rely on them. Raftelis provides management consulting expertise and insights that help bring about the change that our clients seek.

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

RESOURCES & EXPERTISE: Our project team is passionate about strategic planning and organizational optimization. Each member of our team has specialized expertise and has devoted their careers to helping local governments address complex challenges and plan for the future.

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

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

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

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

FIRM CAPABILITIES



Finance: Promote financial integrity and the equitable recovery of costs to achieve your objectives

- Rate, charge, and fee studies
- Financial and capital planning
- Cost of service and cost allocation
- Customer assistance programs
- Affordability analysis
- Asset valuation
- Budget development
- Financial condition assessments
- Debt issuance support
- Grant application assistance
- Billing data assessments
- Economic feasibility and analysis
- Regulated utility support
- Impact fees



Strategic Communications: Inform and engage with your stakeholders to build understanding and support

- Strategic communication planning
- Public involvement and community outreach
- Public meeting facilitation
- Graphic design and marketing materials
- Media and spokesperson training
- Risk and crisis communication
- Social media strategy
- Visual facilitation
- Virtual engagement
- Technical writing and content development



Strategic Planning/Facilitation: Plan for the future to guide your organization to success

- Organization, department, and community-based strategic planning
- Retreat planning and facilitation
- Climate action planning
- Effective Board / Commission / Council governance
- Strategic plan implementation support
- Sustainable materials management planning and implementation
- Effective Utility Management (EUM) assessment facilitation



Executive Services: Identify and develop talent to lead local governments and utilities

- Executive recruitment
- Executive coaching
- Executive performance evaluations
- Succession planning and workforce development
- Raftelis Performance Academy



Utility Development, Implementation, & Program Support: Develop sustainable programs and practices to equitably fund utility services

- Stormwater utility development and implementation support
- Solid waste planning, procurement, implementation, regulation, and compliance
- Water and wastewater utility development



Organizational Assessment: Identify needs, plan for the future, and implement sustainable and positive changes

- Organizational and operational assessments
- Performance measurement and benchmarking
- Staffing level needs assessment
- Organizational climate and culture
- Organizational change management
- Regionalization and service sharing evaluation and support



Asset Management: Maximize asset-based outcomes at optimal cost and risk while meeting all levels of service

- Asset management maturity assessment and gap analysis
- Asset management roadmap development
- Asset risk identification and management
- Life cycle cost analysis
- Remaining useful life development and tracking
- Technology integration and reporting
- CIP planning and prioritization
- Capital project delivery standardization



Data Management & Technology: Gain insights from your data and optimize technology systems to increase effectiveness and engagement

- Digital transformation planning and implementation
- Strategic technology planning (IT master planning)
- Data management and analytics
- Cybersecurity services
- Systems integration support
- Artificial intelligence (AI) readiness assessments
- Technology systems assessment, evaluation, procurement, and implementation support
- Maintenance and asset management technology services
- Business intelligence and performance management reporting
- Custom software solutions support

References

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

Our staff has assisted more than 1,700 local government organizations across the U.S., including some of the largest and most complex agencies in the nation. In the past year alone, Raftelis worked on more than 1,300 strategic planning, financial, management, and/or technology consulting projects for over 700 public-sector agencies in 47 states, the District of Columbia, and Canada. Our team has extensive experience with strategic planning throughout the country. Our clients tell us we are more than just consultants—we are trusted advisors. We point to a strong repeat customer base as part of the evidence, as well as the many clients who have hired us numerous times to do vital work for their organizations. Other clients have shared that our contacts are “enthusiastic” when providing a reference to potential clients while highlighting actionable and practical solutions.

City of Elgin IL

Reference: Rick Kozal, City Manager

P: 847.931.5590 / E: citymanager@cityofelgin.org

Project Name: Strategic Plan / **Award Amount:** \$99,500 / **Award Date:** 2022 / **Completion Date:** 2023

In 2022, the firm was contracted to assist with the creation of a strategic plan for the City of Elgin (City), a diverse community of 115,000 people located 35 miles from Chicago. This work included the facilitation of a series of community input sessions to support ongoing efforts to gather feedback on the draft strategic planning framework developed by the Mayor and Council. The process included the development of an Environmental Scan of the community and the development of implementation plans for each goal area. Four community sessions were held in October, two in-person and two remote. These sessions were open to all members of the community, advertised in English and Spanish, and with Spanish-language interpreters available for each session. Over 75 community members participated in the sessions, during which the strategic planning framework was shared, and participants were asked a set of questions to learn which specific initiatives or projects resonated with them.



Village of Lisle IL

Reference: Jack Knight, Current Village Manager of La Grange (former Assistant Village Manager of Lisle)

P: 708.579.2300 / E: jknight@lagrangeil.gov

Project Name: Strategic Plan / **Award Amount:** \$14,800 / **Award Date:** 2021 / **Completion Date:** 2021

The Village of Lisle (Village) engaged Raftelis in 2021 to update the strategic plan that The Novak Consulting Group, now Raftelis, had prepared in 2018. The new strategic plan was developed with a process including a review of historical data and trends, community engagement through focus groups and an online survey, and a two-day facilitated retreat with the Board of Trustees and Senior Leadership Staff to serve as a blueprint for decision-making moving forward.

Village of La Grange IL

Reference: Jack Knight, Current Village Manager of La Grange (former Assistant Village Manager of Lisle)

P: 708.579.2300 / E: jknight@lagrangeil.gov

Project Name: Strategic Plan / **Award Amount:** \$20,100 / **Award Date:** 2023/ **Completion Date:** 2023

The Village of La Grange (Village) engaged Raftelis to develop a strategic plan with a process that included a review of historical data and trends, community engagement through focus groups, an online survey for Village staff, and a two-day facilitated retreat with the Board of Trustees and Senior Leadership Staff. Once the strategic plan was finalized, Raftelis developed customized implementation templates for each priority area.

City of Joliet IL

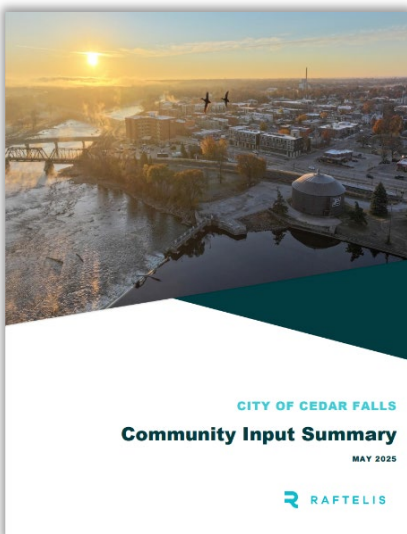
Reference: Beth Beatty, City Manager

P: 815.724.3730 / E: bbeatty@joliet.gov

Project Name: Organizational Assessment / **Award Amount:** \$25,000 and \$85,000 / **Award Date:** 2024 and 2026 / **Completion Date:** 2024 and ongoing

In August 2024, the City of Joliet (City) engaged Raftelis to conduct an Organizational Scan of the City's Human Resources functions. The purpose of this Scan was to assess the alignment of current HR operations with the workforce demands of the City organization. Raftelis conducted individual interviews with each staff member of the HR Department and met with key stakeholders and City leaders. Based on the issue and opportunity areas identified in the Scan, Raftelis developed a set of recommendations for short-term action and identified opportunities for further study and analysis.

Currently, our team is conducting a city-wide staffing study, which includes a detailed review of all City departments to identify opportunities for improved efficiency as well as additional resource needs to address community expectations.



City of Cedar Falls IA

Reference: Danny Laudick, Mayor

P: 319.243.5632 / E: danny.laudick@cedarfalls.com

Project Name: Strategic Plan / **Award Amount:** \$70,725 /

Award Date: 2025 / **Completion Date:** 2026

The City of Cedar Falls (City) engaged Raftelis to lead a collaborative process to develop the City's next organization-wide strategic plan. Using a mix of digital engagement tools and in-person facilitation, Raftelis has actively engaged policymakers, staff, and the community and has translated their insights into a shared long-term vision and strategic plan. When finalized, the plan will ultimately include goals and action plans to inform the City's operations and decision-making for the next five years and into the future.

City of Morgantown WV

Reference: Emily Muzzarelli, Assistant City Manager

P: 304.284.7406 / E: asstcitymanager@morgantownwv.gov

Project Name: Strategic Plan / **Award Amount:** \$58,000 / **Award Date:** 2024 / **Completion Date:** 2024

The City of Morgantown (City) engaged the firm to provide comprehensive strategic planning services. Our work included a survey of City staff and each member of the City Council to solicit input on the renewed strategic plan. Raftelis facilitated a strategic planning workshop with the Council and key staff to articulate the desired future for the community. We then worked to operationalize the plan through onsite meetings with department staff to connect existing programs and services with strategic outcomes, develop key performance indicators, and provide recommendations on how to regularly update the new strategic plan and evaluate progress toward its achievement.



PROJECT APPROACH

Approach

At its best, strategic planning engages individuals and strengthens a sense of community that undergirds strong civic engagement. We believe organizations function best when there is engagement during good times, not just when people oppose something. By creating constructive dialogue, the organization is much more likely to react productively and civilly when something occurs that might otherwise bring out nonproductive forms of engagement.

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

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

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



A strategic planning process involves several steps:

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

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

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

In this way, a strategic plan is a roadmap to move an organization toward its intended vision.

Scope of Work

THE FOLLOWING OUTLINES OUR PROPOSED SCOPE OF WORK FOR DEVELOPING A STRATEGIC PLAN WITH THE CITY.

Activity 1: Launch Project

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

At the start of the engagement, our team will conduct a kick-off meeting with the City project leadership to discuss the project, schedule, and communication and engagement strategies for the project. We will provide the City with a document/data request for background information, such as community survey results, existing planning documents, demographic information, and more. We will carefully review the information to learn about the City's operating context and key projects and initiatives over the next several years.

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

Meetings: • Project kick-off meeting	Deliverables: • Kick-off meeting agenda • Background and data request • Final project schedule
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Activity 2: Conduct Discovery and Internal Engagement

In this activity, our team will work collaboratively with the City to engage with the organization to develop an Environmental Scan. The Scan will provide helpful background information and important context about the current state of the City and future impacts, which will serve as a foundation for developing the strategic plan.

Raftelis will administer an online survey to department and division leads (and others if desired) to solicit their perspectives about the strategic plan and to develop an understanding of the strengths, weaknesses, opportunities, and challenges (SWOC) for the City, as well as any external factors that might impact the City over the next five to seven years. We will also seek their input regarding organizational mission and values.

Raftelis will facilitate a half-day workshop with the City's department directors to engage them in this process and conduct a SWOC exercise. We will also ask about planned or desired future initiatives that may occur during the next several years.

Next, Raftelis will incorporate all information received through document review, interviews, surveys, and listening sessions into the development of an Environmental Scan. The Environmental Scan will provide helpful background information about the City's current state and potential future impacts. To finalize the Environmental Scan, we will gather existing data about the community, such as financial trends, demographic data, statistics about housing, business, and jobs, and other relevant information. We will also benchmark the City against other similar municipalities. This information will provide important context and a foundation upon which the strategic plan can be developed. We will review the Scan with the City's project team, perform any necessary follow-up work, and finalize it.

We will then meet with the City's department directors and division leaders to review the Environmental Scan and update the City's Mission and Values statement. We will facilitate this workshop using employee survey feedback to inform the discussion. Our visual facilitator will transform your conversations into live graphic form, before participants leave the room, promoting a sense of shared understanding.

Meetings: • Half-day workshop with the department directors • Full-day workshop with department directors and division directors	Deliverables: • Environmental scan • Organizational vision, mission, and values
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Activity 3: Develop Strategic Priorities and Goals

We will develop and facilitate a Strategic Planning Workshop with the City leadership to finalize the strategic plan framework. This will include the Vision, Strategic Priorities, and Goals. We will also provide the opportunity to develop strategic initiatives and action plans that will guide implementation so the Vision can be realized. This workshop will include activities with the entire group as well as small group break-out sessions that will allow everyone to actively participate and engage in the process.

During the session, the primary role of the facilitator is to ensure that the environment is respectful and conducive to open and constructive dialogue so that the established objectives are ultimately met. While the agenda provides the structure to accomplish the tasks, we also know how important it is to pay attention to the group and make sure that conversations that need to happen actually happen, so we are flexible and in tune with the group during the process.

Meetings: • Full-day workshop with the department directors	Deliverables: • Final Strategic Plan framework
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Activity 4: Support Implementation and Evaluation

In order to ensure the implementation of the strategic plan, our team will prepare a custom implementation template for each Strategic Priority area identified during the City leadership workshop. These templates will help to ensure consistency across the organization and to enhance accountability to ensure that progress is made on the City's strategic objectives.

We will meet with key staff members responsible for achieving each Strategic Priority to identify specific strategies, who is accountable, estimated timeline, resources required, and performance metrics to be used to ensure forward progress. We will work with the City to develop a plan and guidelines for regularly updating these templates and the Administration on a consistent basis. Finally, we will identify specific means to integrate the strategic planning framework into key organizational processes so that City work plans are built into the foundation of the City strategic priorities and the City's new Vision.

Meetings: • Up to two days of workshops with City staff to develop implementation plans	Deliverables: • Implementation plans
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Activity 5: Prepare Final Deliverables

In our final activity, Raftelis will prepare a high-quality strategic planning document for review by the City. Based upon feedback received, our team will finalize the strategic plan document and present it to the City as desired. The

strategic framework deliverable will be a succinct planning instrument using easily understandable language and high-quality graphics, worthy of posting on the City's website and dissemination to internal and external audiences. We will also conduct a final engagement debrief with the Project Team.

Meetings:

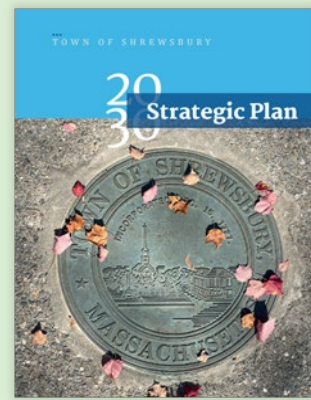
- Final presentation
- Engagement debrief meeting

Deliverables:

- Final Strategic Plan deliverables

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

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



Schedule

A proposed project schedule is provided below. We expect to review and refine this with the City during Activity 1.

TASKS	JUL	AUG	SEP	OCT	NOV	DEC
Activity 1 - Launch Project						
Activity 2 - Conduct Discovery and Internal Engagement						
Activity 3 - Develop Strategic Priorities and Goals						
Activity 4 - Support Implementation and Evaluation						
Activity 5 - Provide Final Deliverables and Communication Tools						



APPENDIX: EVIDENCE OF SIGNATURE AUTHORITY

Appendix: Evidence of Signature Authority



RESOLUTION 2026-
001

AUTHORIZING CONTRACTUAL SIGNATORY AUTHORITY
FOR RAFTELIS FINANCIAL CONSULTANTS, INC.

WHEREAS the Amended RFC Bylaws state “The Board of Directors may authorize any officer or officers, agent or agents, to enter into any contract or execute and deliver any instrument in the name of and on behalf of the Corporation, and such authority may be general or confined to specific instances,” now

Therefore, the Board of Directors of Raftelis Financial Consultants, Inc. authorizes the following signatory authority.

Professional Services Contracts

The Board authorizes any Officer or Vice President of the Corporation to execute, on behalf of the Corporation, any contractual documentation related to entering into an obligation to perform professional services for an entity and/or an obligation with a subcontractor to perform such professional services. The Board also authorizes individuals who are acting on an executive level to execute on behalf of the Corporation any contractual documentation related to entering into an obligation to perform professional services for an entity. The contractual ceiling to which these individuals are limited to enter into an obligation to perform professional services for an entity are as follows:

Individual	Signatory Limit
Peiffer Brandt	Unlimited
Elaine Conti	Unlimited
Jon Davis	Unlimited
Michelle Ferguson	Unlimited
Bart Kreps	Unlimited
Melissa Levin	Unlimited
Henrietta Locklear	Unlimited
John Mastracchio	Unlimited
Christine McIntyre	Unlimited
William Stannard	Unlimited
Stacey Aukamp	\$1,000,000
Thomas Beckley	\$1,000,000
Thierry Boveri	\$1,000,000
Rocky Craley	\$1,000,000
Joe Crea	\$1,000,000
David Fox	\$1,000,000
Steve Gagnon	\$1,000,000

Murray Hamilton	\$1,000,000
Nancy Hetrick	\$1,000,000
Chris McPhee	\$1,000,000
Aditya Ramamurthy	\$1,000,000
Harold Smith	\$1,000,000
Doug Spiers	\$1,000,000
Henry Thomas	\$1,000,000
Catherine Tuck Parrish	\$1,000,000
Catherine Carter	\$500,000
Todd Cristiano	\$500,000
Collin Drat	\$500,000
Angie Flores	\$500,000
Jonathan Ingram	\$500,000
Scott Parker	\$500,000
Jennifer Tavantzis	\$500,000
Steven Courtney	\$500,000
Mike Burton	\$250,000
Mihaela Coopersmith	\$250,000
Katie Cromwell	\$250,000
Zach Green	\$250,000
Amanda Guci	\$250,000
Anthony Hairston	\$250,000
Will Kerr	\$250,000
Kevin Kostiuk	\$250,000
Morgan McCarthy	\$250,000
Steven McDonald	\$250,000
Shawn Ocasio	\$250,000
Rob Ori	\$250,000
Sudhir Pardiwala	\$250,000
Jennifer Porter	\$250,000
Justin Rasor	\$250,000
Andrew Rheem	\$250,000
Keith Readling	\$250,000
Phil Sapone	\$250,000
Brandon Vatter	\$250,000
Joe Williams	\$250,000
John Wright	\$250,000
Nick Zoller	\$250,000

Engagement Letters

The Board also authorizes the list above plus the following individuals to execute engagement letters with no terms and conditions contained therein. The contractual ceiling to which these individuals are limited to enter into an obligation to perform professional services through an engagement letter for an entity are as follows:

Individual	Signatory Limit
Chad Cowan	\$100,000
Toby Fedder	\$100,000
Heather Gantz	\$100,000
Rebekka Hosken	\$100,000
Jackie Jarrell	\$100,000
Emily Uselton	\$100,000
Samantha Villegas	\$100,000
Pam Wideman	\$100,000
Kathryn Willis	\$100,000

Vendor Contracts

The Board authorizes individuals who are acting on an executive level to execute on behalf of the Corporation any contractual documentation related to entering into an obligation to a vendor, with the exception of office leases. The contractual ceiling to which these individuals are limited to enter into an obligation to a vendor are as follows:

Individual	Signatory Limit
Peiffer Brandt	Unlimited
Elaine Conti	\$100,000
David George	\$100,000
Christine McIntyre	\$100,000
Chris McPhee	\$100,000
Lisa Wilson	\$100,000

Office Leases

The Board authorizes only the Chief Executive Officer to execute office leases.

Approved and adopted the 20th day of January 2026. I, the undersigned, hereby certify that the foregoing Resolution was duly adopted by the Raftelis Financial Consultants, Inc. Board of Directors.

Christine McIntyre
 Secretary
 RAFTELIS FINANCIAL CONSULTANTS, INC.
 CORPORATE SEAL
 NORTH CAROLINA

City of Aurora

Strategic Planning

RFP NO. 26-001 / MARCH 31, 2026 / COST PROPOSAL



Pricing

The total fixed fee to complete the scope of work outlined in this proposal is \$95,450, which includes all professional fees and expenses, including travel.

A breakdown of cost by project activity is provided in the table below.

Activity	Description	Cost
1	Launch Project	\$7,200
2	Conduct Discovery and Internal Engagement	\$40,725
3	Develop Strategic Priorities and Goals	\$14,750
4	Support Implementation and Evaluation	\$16,575
5	Provide final Deliverables and Communication Tools	\$16,200
TOTAL		\$95,450

It is our practice to invoice clients for monthly progress payments based upon work completed.

CITY OF AURORA AGREEMENT

THIS AGREEMENT, entered on this March 31, 2026 (“Effective Date”), for the (Services”) is entered into between the **CITY OF AURORA** (“City”), a municipal corporation, located at 44 E. Downer Place, Aurora, Illinois and Raftelis (“Proposer”), located at .

WHEREAS, the City issued a Request for Proposal (“RFP”) on February 24, 2026 for the ; and

WHEREAS, the Proposer submitted a Proposal in response to the RFP and represents that it is ready, willing and able to perform the Services specified in the RFP and herein as well as any additional services agreed to and described in the Agreement; and

WHEREAS, on N/A, the City awarded a contract to Proposer, Raftelis .

IN CONSIDERATION of the mutual promises and covenants herein contained, the parties hereto do mutually agree to the following:

1. Agreement Documents.

The Agreement shall be deemed to include this document, Proposer’s response to the RFP, to the extent it is consistent with the terms of the RFP, any other documents as agreed upon by the parties throughout the term of this Agreement, along with any exhibits, all of which are incorporated herein and made a part of this Agreement. In the event of a conflict between this Agreement and any exhibit, the provisions of this Agreement shall control.

Request for Proposal 26-001 .

In connection with the RFP and this Agreement, Proposer acknowledges that it has furnished and will continue to furnish various certifications, affidavits and other information and reports, which are incorporated herein. Proposer represents that such material and information furnished in connection with the RFP and this Agreement is truthful and correct. Proposer shall promptly update such material and information to be complete and accurate, as needed, to reflect changes or events occurring after the Effective Date of this Agreement.

2. Scope of Services.

Proposer shall perform the Services listed in the Proposal, attached hereto as Exhibit 1.

3. Term.

This agreement shall remain in effect until the terms of the RFP and completion of services have been met, unless sooner terminated in accordance with the terms contained herein, ends upon completion of services.

4. Compensation.

Maximum Price. In accordance with the Proposer's negotiated cost, the price for providing the Services shall be as stated on the submitted proposal, Exhibit 2.

Schedule of Payment. The City shall pay the Proposer for the Services in accordance with the amounts set forth in Exhibit 2, price shall remain firm for the entire contract period. The Proposer shall be required to submit an itemized invoice as well as any supporting documentation as required by the City. Each invoice shall be accompanied by a statement of the Proposer of the percentage of completion of the Services through the date of the invoice. Payment shall be made upon the basis of the approved invoices and supporting documents. The City, after inspection and acceptance, and in consideration of the faithful performance by the Proposer, agrees to pay for the completion of the work embraced in this Contract. Payment shall be made in accordance with the Illinois Local Government Prompt Payment Act (50 ILCS 505/1, *et. seq.*) upon receipt of the invoice.

5. Performance of Services.

Standard of Performance. Proposer shall perform all Services set forth in this Agreement, and any other agreed documents incorporated herein, with the degree, skill, care and diligence customarily required of a professional performing services of comparable scope, purpose and magnitude and in conformance with the applicable professional standards. Proposer shall, at all times, use its best efforts to assure timely and satisfactory rendering and completion of the Services. Proposer shall ensure that Proposer and all of its employees or subcontractors performing Services under this Agreement shall be: (i) qualified and competent in the applicable discipline or industry; (ii) appropriate licensed as required by law; (iii) strictly comply with all City of Aurora, State of Illinois, and applicable federal laws or regulations; (iv) strictly conform to the terms of this Agreement. Proposer shall, at all times until the completion of the Services, remain solely responsible for the professional and technical accuracy of all Services and deliverables furnished, whether such services are rendered by the Proposer or others on its behalf, including, without limitation, its subcontractors. No review, approval, acceptance, nor payment for any and all of the Services by the City shall relieve the Proposer from the responsibilities set forth herein.

6. Termination.

Termination for Convenience. The City has the right to terminate this Agreement, in whole or in part, for any reason or if sufficient funds have not been appropriated to cover the estimated requirement of the Services not yet performed, by providing Proposer with sixty (60) days notice specifying the termination date. On the date specified, this Agreement will end. If this Agreement is terminated by the City, as provided herein, the City shall pay the Proposer only for

services performed up to the date of termination. After the termination date, Proposer has no further contractual claim against the City based upon this Agreement and any payment so made to the Proposer upon termination shall be in full satisfaction for Services rendered. Proposer shall deliver to the City all finished and unfinished documents, studies and reports and shall become the property of the City.

7. Miscellaneous Provisions.

a. Illinois Freedom of Information Act. The Proposer acknowledges the requirements of the Illinois Freedom of Information Act (FOIA) and agrees to comply with all requests made by the City of Aurora for public records (as that term is defined by Section 2(c) of FOIA in the undersigned's possession and to provide the requested public records to the City of Aurora within two (2) business days of the request being made by the City of Aurora. The undersigned agrees to indemnify and hold harmless the City of Aurora from all claims, costs, penalty, losses and injuries (including but not limited to, attorney's fees, other professional fees, court costs and/or arbitration or other dispute resolution costs) arising out of or relating to its failure to provide the public records to the City of Aurora under this agreement.

b. Entire Agreement. This Agreement, along with the documents set forth in Section 1 and incorporated by reference elsewhere in this Agreement, with consent of the parties, represents the entire agreement between the parties with respect to the performance of the Services. No other contracts, representations, warranties or statements, written or verbal, are binding on the parties. This Agreement may only be amended as provided herein.

c. Consents and Approvals. The parties represent and warrant to each other that each has obtained all the requisite consents and approvals, whether required by internal operating procedures or otherwise, for entering into this Agreement and the undertakings contemplated herein.

d. Counterparts. This Agreement may be executed in one or more counterparts, each of which shall be an original, but all of which shall constitute one and the same instrument.

CITY OF AURORA, ILLINOIS

(Contractor)

SIGNATURE

Jolene Coulter

FULL NAME

DATE SIGNED

Director of Purchasing

TITLE



SIGNATURE

Michelle Ferguson

FULL NAME

March 31, 2026

DATE SIGNED

Executive Vice President

TITLE

CITY OF AURORA, ILLINOIS

CONTACT INFORMATION

Vendor shall provide the following contact information assigned to service the City of Aurora account.

Customer Service/General Information: Ph: 704.373.1199

To place an order:

Name: Michelle Ferguson

Ph: 513.221.0500 Fax: 828.484.2442

E-mail: mferguson@raftelis.com

Billing & Invoicing questions:

Name: Jessica Jasso

Ph: 704.247.3227 Fax: 828.484.2442

E-mail: jjasso@raftelis.com

Questions:

Name: Michelle Ferguson

Ph: 513.221.0500 Fax: 828.484.2442

E-mail: mferguson@raftelis.com

Bidder's Name: Raftelis Financial Consultants, Inc. (DBA Raftelis)

Signature & Date:  3/31/2026