

General Professional Services Questionnaire Instructions

- The General Professional Services Questionnaire shall be used for all professional services except outside legal services and architecture, engineering, or survey projects.
- **The General Professional Services Questionnaire should be completely filled out. Complete and attach ALL sections. Insert “N/A” or “None” if a section does not apply or if there is no information to provide.**
- Questionnaire must be signed by an authorized representative of the Firm. Failure to sign the questionnaire shall result in disqualification of proposer pursuant to J.P. Code of Ordinances Sec. 2-928.
- All subcontractors must be listed in the appropriate section of the Questionnaire. Each subcontractor must provide a complete copy of the General Professional Services Questionnaire, applicable licenses, and any other information required by the advertisement. Failure to provide the subcontractors' complete questionnaire(s), applicable licenses, and any other information required by the advertisement shall result in disqualification of proposer pursuant to J.P. Code of Ordinances Sec. 2-928.
- If additional pages are needed, attach them to the questionnaire and include all applicable information that is required by the questionnaire.

General Professional Services Questionnaire

A. Project Name and Advertisement Resolution Number:

Services to Develop a Parish-Wide Cost Allocation Plan; SOQ No. 23-016

B. Firm Name & Address:

Matrix Consulting Group, Ltd.
1650 S. Amphlett Blvd. Suite 213
San Mateo, CA 94402

C. Name, title, & contact information of Firm Representative, as defined in Section 2-926 of the Jefferson Parish Code of Ordinances, with at least five (5) years of experience in the applicable field required for this Project:

Richard Brady, President
Matrix Consulting Group, Ltd.
1650 S. Amphlett Blvd. Suite 213
San Mateo, CA 94402
(650) 858-0507
rbrady@matrixcg.net

D. Address of principal office where Project work will be performed:

Our proposed project executive is located in our San Mateo office (address above). Our proposed project manager is located in our Irvine, CA office located at:

18012 Cowan, Suite 200
Irvine, CA 92614

E. Is this submittal by a JOINT-VENTURE? Please check:

YES ☐ NO ☒

If marked "No" skip to Section H. If marked "Yes" complete Sections F-G.

F. If submittal is by JOINT-VENTURE, list the firms participating and outline specific areas of responsibility (including administrative, technical, and financial) for each firm. Please attach additional pages if necessary.

1.

2.

General Professional Services Questionnaire

G. Has this JOINT-VENTURE previously worked together? Please check: YES _____ NO _____		
H. List all subcontractors anticipated for this Project. Please note that <u>all subcontractors must submit a fully completed copy of this questionnaire</u>, applicable licenses, and any other information required by the advertisement. See Jefferson Parish Code of Ordinances, Sec. 2-928(a)(3). Please attach additional pages if necessary.		
Name & Address:	Specialty:	Worked with Firm Before (Yes or No):
1. N/A		
2.		
3.		
4.		
5.		

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I. Please specify the total number of support personnel that may assist in the completion of this Project: <div style="border-bottom: 1px solid black; width: 100px; margin-top: 5px;">1</div>
J. List any professionals that may assist in the completion of this Project. If necessary, please attach additional documentation that demonstrates the employment history and experience of the Firm's professionals that may assist in the completion of this Project (i.e. resume). Please attach additional pages if necessary.
PROFESSIONAL NO. 1
Name & Title:
Courtney Ramos, Senior Vice President & Financial Services Practice Leader
Name of Firm with which associated:
Matrix Consulting Group, Ltd.
Description of job responsibilities:
Since joining the firm in 2005, Ms. Ramos has managed and assisted with numerous cost allocation plans, user fee, management, operations, and staffing analyses for our California and national clients. For this engagement, she will serve as the City's primary contact for the project, providing expertise in reviewing drafts and presenting results.
Years' experience with this Firm:
18
Education: Degree(s)/Year/Specialization:
A.A., Santa Barbara City College; Administration of Justice, 2009 A.A., Santa Barbara City College; Sociology, 2009
Other experience and qualifications relevant to the proposed Project:
Courtney is our Financial Services Practice Leader, who oversees cost allocation plan, user fee, development impact fee, and cost of service engagements. Her tenure with the firm has also included participation in operational audit engagements focusing on reviewing organizational and staffing structures to enhance services. Additionally, she developed the Technical Models used by the Matrix Consulting Group.

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PROFESSIONAL NO. 2
Name & Title:
Khushboo Ingle, Senior Manager
Name of Firm with which associated:
Matrix Consulting Group, Ltd.
Description of job responsibilities:
Khushboo is a Senior Manager who manages cost allocation plan, user fee, development impact fee, and cost of service engagements. Her experience with the firm also includes participation in operational audit engagements focusing on reviewing organizational, staffing, and internal processes to enhance services. As Project Manager of this engagement, she will be responsible for leading interviews, financial analysis, policy discussion and development.
Years' experience with this Firm:
11
Education: Degree(s)/Year/Specialization:
B.A., University of California San Diego; International Economics, 2010 M.A., University of California San Diego; International Affairs, 2011
Other experience and qualifications relevant to the proposed Project:
While the primary focus of Khushboo's is Financial Services studies, she is also highly knowledgeable with Management Consulting, specializing in policies and procedures. She is trained in Best Management Practices for User Fee, Impact Fee, and Revenue Enhancement practices as well as OMB Cost Allocation Guidelines.

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PROFESSIONAL NO. 3
Name & Title:
Madison Dixon, Consultant
Name of Firm with which associated:
Matrix Consulting Group, Ltd.
Description of job responsibilities:
Madison is a consultant who supports our senior staff in all service areas with a focus on Financial Services relating to cost of service.
Years' experience with this Firm:
2
Education: Degree(s)/Year/Specialization:
B.A., University of California Irvine; Anthropology, 2017 A.A., Saddleback Community College; Biology and Chemistry, 2015
Other experience and qualifications relevant to the proposed Project:
Madison has recently provided support in developing cost allocation plans for: Dallas (TX), Miami Beach (FL), Rio Grande County (CO), and Allentown (PA). Prior to joining the Matrix Consulting Group, Ms. Dixon was a Senior Machine Learning Data Associate in which she collected, analyzed, and reported on data relating to various internal projects.

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PROFESSIONAL NO. 4
Name & Title:
Abnash Minhas, Consultant
Name of Firm with which associated:
Matrix Consulting Group, Ltd.
Description of job responsibilities:
Abnash recently joined the firm as a consultant. As part of our Financial Services team, she supports senior staff on cost of service engagements including cost allocation plan, user fee, and development impact fee studies.
Years' experience with this Firm:
1
Education: Degree(s)/Year/Specialization:
B.A., University of California, San Diego; Economics with a minor in Business, 2020.
Other experience and qualifications relevant to the proposed Project:
Abnash has recently assisted on projects for Chico, Redlands, and San Bernardino, CA. Prior to joining the Matrix Consulting Group, she was a contracts and grants analyst, focusing on fund allocations and reconciliations, financial tracking, fiscal forecasting, and grant proposal development.

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PROFESSIONAL NO. 5
Name & Title:
Name of Firm with which associated:
Description of job responsibilities:
Years' experience with this Firm:
Education: Degree(s)/Year/Specialization:
Other experience and qualifications relevant to the proposed Project:

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K. List all prior projects that best illustrate the Firm's qualifications relevant to this Project. Please include any and all work performed for Jefferson Parish. Please attach additional pages if necessary.

PROJECT NO. 1

Project Name, Location and Owner's contact information:	Description of Services Provided:
City of Bellaire, TX Terrence Beaman, CFO 708 South Rice Ave. Bellaire, TX 77401 (713) 662-8251 TBeaman@bellairetx.gov	Cost Allocation Plan Citywide User Fee Study
Length of Services Provided:	Cost of Services Provided:
FY20-21	\$35,000

PROJECT NO. 2

Project Name, Location and Owner's contact information:	Description of Services Provided:
Miami Beach, FL Tameka Otto Stewart Budget Director 1700 Convention Center Dr. Miami Beach, FL 33139 (305) 673-7510 TamekaOttoStewart@miamibeachfl.gov	1. Internal Services Cost Allocation Plan 2. Citywide Cost Allocation Plan 3. OMB Cost Allocation Plan 4. Resort Tax Cost Allocation Plan
Length of Services Provided:	Cost of Services Provided:
FY16-17, FY18-19	\$25,000 annually

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PROJECT NO. 3	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Osceola County, FL Alvin Hall Lead Budget Analyst 1 Courthouse Square Kissimmee, FL 34741 (407) 742-1810 alvin.hall@osceola.org	Full Cost Allocation Plan
Length of Services Provided:	Cost of Services Provided:
FY18-19, FY19-20, & FY20-21	\$25,000 annually

PROJECT NO. 4	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Richland, WA Brandon Allen, Financial Analyst 505 Swift Blvd. Richland, WA 99352 (509) 942-7302 ballen@ci.richland.wa.us	OMB Cost Allocation Plan
Length of Services Provided:	Cost of Services Provided:
FY15-16	\$41,500

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PROJECT NO. 5	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Dallas, TX Janette Weedon Assistant Director Office of Budget 1500 Marilla St. Dallas, TX 75201 (214) 670-3660 janette.weedon@dallascityhall.com	1. Full Cost Allocation Plan 2. OMB Cost Allocation Plan 3. Indirect Cost Rate Proposal 4. Special Event Fees
Length of Services Provided:	Cost of Services Provided:
FY15-Current	\$18,000 annually

PROJECT NO. 6	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Champaign, IL Debra Busey 102 N. Neil St. Champaign, IL 61820 (217)778-4471 debra.busey@champaignil.gov	1. Cost Allocation Plan 2. Comprehensive Fee Study
Length of Services Provided:	Cost of Services Provided:
FY16-17	\$61,300

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PROJECT NO. 7	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Fort Lauderdale, FL Laura Aker Reece, Director Office of Management & Budget 100 N. Andrews Ave. Fort Lauderdale, FL 33301 (954) 828-5894 lreece@fortlauderdale.gov	1. Cost Allocation Plan 2. IT Cost Allocation Plan 3. FXE PILOT Review
Length of Services Provided:	Cost of Services Provided:
FY11-FY16	\$18,000 annually

PROJECT NO. 8	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Juneau, AK Adrien Speegle, Budget Manager 105 Municipal Way #201 Juneau, AK 99801 (907) 586-5215 Adrien.Speegle@juneau.org	1. Full Cost Allocation Plan 2. OMB Cost Allocation Plan 3. Marine Passenger Fund Cost Plan
Length of Services Provided:	Cost of Services Provided:
FY19, FY20, FY21, FY22	\$21,820

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PROJECT NO. 9	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Maui County, HI Mark Walker Finance Manager 200 S. High St. Wailuku, HI 96793 (808) 270-7722 Mark.Walker@co.maui.hi.us	Cost Allocation Plan
Length of Services Provided:	Cost of Services Provided:
FY15-16	\$20,000

PROJECT NO. 10	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Medford, OR Ryan Martin, CFO/Deputy City Mgr. 411 W. 8th Street Medford, Oregon 97501 (541) 774-2033 ryan.martin@cityofmedford.org	Cost Allocation Plan
Length of Services Provided:	Cost of Services Provided:
FY22	\$13,450

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L. List all prior and/or on-going litigation between Firm and Jefferson Parish. Please attach additional pages if necessary.

Parties:		Status/Result of Case:
Plaintiff:	Defendant:	
1. N/A		
2.		
3.		
4.		

M. Use this space to provide any additional information or description of resources supporting Firm's qualifications for the proposed project.

We have included a more detailed Statement of Qualifications that provides information about the qualifications and experience of our firm and proposed project team.

We are committed to ensuring that all cost centers being allocated comply with state and local laws, use fair and equitable allocation metrics, and are documented and defensible.

N. To the best of my knowledge, the foregoing is an accurate statement of facts.

Signature:  Print Name: Richard P. Brady

Title: President Date: July 18, 2023