



**To:** Board of Directors  
**From:** Allison Segal  
**Meeting Date:** July 24, 2025

**Agenda Item:** 5.2 Municipal Financial Services Advisor Baker Tilly Preliminary Presentation & Introduction

**Recommendation:** N/A

**Discussion:** Both parties executed the contract for municipal financial advisory services on July 3, 2025. Staff had an initial meeting with Steve Scharff (Project Director), Lauren Volz (Analytical Support), and Abigail Garrard (Analytical Support) last week. The Maintenance, Operations, and Administrative Base and Shared Infrastructure projects were discussed, and staff provided documentation to Baker Tilly to begin a financial analysis.

Baker Tilly will make a brief presentation introducing their team and discussing their process and will take questions from the Board.

Both Baker Tilly and Dorsey Whitney will return to the board with more in-depth information once Dorsey Whitney is under contract to begin discussing the projects in more detail to ensure the options presented are viable for the agency.

**Financial Impact:** N/A

**DBE-Certified Vendor –** N/A