

The word 'PROPOSAL' in a large, bold, yellow sans-serif font, overlaid on a horizontal band of a sunset photograph.

PROPOSAL TO THE

City of Margate

TO PROVIDE

City Strategic Plan Consulting Services

BerryDunn

2211 Congress Street
Portland, ME 04102

Seth Hedstrom

Project Principal
shedstrom@berrydunn.com

Michelle Kennedy

Engagement Manager
mkennedy@berrydunn.com

Karen Whichard

Project Manager and Facilitator
karen.whichard@berrydunn.com

Submission Deadline

November 21, 2023 before 11 a.m.



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November 21, 2023

City of Margate
5790 Margate Blvd
Margate, FL 33063

To Whom It May Concern:

On behalf of Berry, Dunn, McNeil & Parker, LLC (BerryDunn), I am pleased to submit this proposal in response to the City of Margate's (the City's) Request for Proposals (RFP) No. 2023-016 for City Strategic Plan Consulting Services. We have read the City's request and reviewed its terms, conditions, and the contents presented therein. Our proposal is a firm and irrevocable offer valid for 90 calendar days from the proposal deadline of November 21, 2023.

BerryDunn is a nationally recognized independent management and IT consulting firm, headquartered in Portland, Maine with eight office locations nationally. **Focused on inspiring organizations to transform and innovate**, we are a stable and well-established firm that has preserved our core values and reputation for excellence throughout our 49-year history. We have enjoyed steady growth by providing consistent, high-quality services to our clients in all 50 states—including numerous clients in the State of Florida (the State)—Puerto Rico, and Canada.

Our firm's culture is centered on a deep understanding of our clients' commitment to serving the public. The human aspect of projects can often be forgotten in the maze of regulatory changes and legal requirements with which public-sector organizations must comply. BerryDunn proudly tailors each of its projects to recognize the work our clients do every day. **We care about what we do, and we care about the people impacted by our work—including those at the State.**

Understanding the City's Needs

The City of Margate is conveniently nestled between beach, ocean, wildlife areas, and metropolitan hotspots. With easy access to a variety of outdoor activities that cater to any and all interests, the City offers a family-friendly, suburban environment with nearby big-city attractions. Along with being richly diverse racially, occupationally, and socially, Margate is undoubtedly one of the friendliest places in the State with happy, vibrant neighborhoods.

As the sun sets on the City's current strategic plan, Margate's leadership proactively seeks a qualified consultant to assist in developing City priorities that can be appropriately paired with budget requests and other City-led initiatives. Upon project completion, the City can expect a Final Margate Strategic Plan that considers the City's current Plan; protects the City's sense of self; meets the City's demands for services; and outlines implementation planning efforts for longevity and long-term success.

Meeting the City's Time Frame

Our approach is rooted in decades of performing comparable initiatives; proven and refined methodologies; and lessons learned from facilitating dozens of similar projects across the country for local government clients, several of which are of a similar size, scope, and complexity to that of the City. We build in flexibility to our approach to meet the needs of our clients and address any concerns or unexpected delays that should arise. **That said, we will be sure to work with the City to ensure the required deadlines are met.**

Unique Qualifications

As is evident in the key points that follow, we are well-qualified to partner with the City on its requested strategic planning initiative. We look forward to leveraging our strengths to support the City's related needs both now and in the future.



OUR DECADES OF RELEVANT STRATEGIC PLANNING EXPERIENCE

BerryDunn's Local Government Practice Group is dedicated to serving the public sector and provides a wide variety of services, informing and enhancing our ability to support our clients with strategic planning initiatives. We are skilled at facilitating, communicating, and visioning. In fact, our proposed engagement manager, Michelle Kennedy, has nearly three decades of strategic planning experience and facilitated more than 70 strategic planning processes over the course of her career, including in-State initiatives for the cities of Cooper City, Groveland, and Lauderhill. Our proposed project manager, Karen Whichard, has a unique background that includes technical expertise in both local government budget and finance as well as community engagement. This broad exposure to the strategic planning process gives us an in-depth understanding of the importance in establishing trust and credibility with stakeholders and effectively engaging said stakeholders in the planning process to build buy-in for a common vision and commitment to action.



OUR DEMONSTRATED COMMITMENT TO SERVING CLIENTS IN THE STATE

The City will benefit from our familiarity with the State's public-sector landscape and experience successfully completing projects of similar size and complexity. Our public-sector experience in the State includes work with nearly four dozen municipalities, counties, public schools, colleges and universities, and quasi-governmental agencies, including strategic planning initiatives for the cities of Cooper City, Groveland, and Lauderhill, as well as St. Johns County. Using our expansive knowledge and lessons learned from these projects, we will provide the City with optimal efficiency, superior services, and productivity on this engagement.



OUR STRONG FACILITATION APPROACH AND COMMUNICATION SKILLS

We understand that reaching consensus can be difficult as individuals seek to advocate for the needs and concerns they believe in most and that represent the interests of their constituencies. Our approach is based in the Institute of Cultural Affairs' (ICA) Technology of Participation® (ToP®) facilitation methodology and designed to meet the needs of stakeholders, including elected and appointed officials, managers, frontline staff, and the public. Throughout the process, we will keep stakeholders informed and involved, helping to ensure the City's strategic planning effort is inclusive of all perspectives and reflects a shared vision. We also offer various innovative engagement strategies intended to generate excitement for the project, participation in the work effort, equity in information-gathering activities, success in thoroughly assessing the current environment, and understanding in how to bring the City to new heights.



OUR HIGHLY SKILLED PROJECT TEAM AND THEIR COMMITMENT TO LOCAL GOVERNMENT

All our project team members exclusively serve local government clients and the majority have prior experience working in local government organizations prior to joining BerryDunn. Having served dozens of local governments across the country, our team has a deep understanding of local government organizations, as well as the opportunities and constraints associated with the region's public-sector landscape. Further, we are proud to offer a pool of over 325 consulting resources. These resources offer experience and expertise among practices such as community development and planning; justice and public safety; parks, recreation, and libraries; health and community services; among others. Collectively, we are well-qualified to support the City as it seeks to improve, transform, and innovate as well as achieve its desired future state.

As a principal in and the leader of BerryDunn's Local Government Practice Group, I can attest to the accuracy of our materials, and I am legally authorized to bind, negotiate, make presentations on behalf of, and commit our firm and our resources. If you have any questions regarding our proposal or updates on the evaluation process, please consider me your primary point of contact and feel free to contact me directly.

Sincerely,

A handwritten signature in black ink, appearing to read 'S Hedstrom'.

Seth Hedstrom, PMP®, LSSGB, Principal

2211 Congress Street, Portland, ME 04102-1955

t/f: 207-541-2212 | e: shedstrom@berrydunn.com

Our Mission: We create positive change and advocate for exceptional outcomes in local governments and their communities through partnership and trusted guidance.

2. TECHNICAL PROPOSAL

Firm Qualifications

BerryDunn is a nationally recognized independent management and IT consulting firm focused on inspiring organizations to transform and innovate. As a Limited Liability Company formed in 1974 with 65 principals, 34 owners, and eight office locations (Portland, Maine; Bangor, Maine; Boston, Massachusetts; Charleston, West Virginia; Hartford, Connecticut; Manchester, New Hampshire; Phoenix, Arizona; and San Juan, Puerto Rico), we have experienced sustained growth throughout our 49-year history.

We employ more than 825 staff members—including more than 325 in our Consulting Services Team. From extensive project experience for more than 600 state, local, and quasi-governmental agencies, our team brings valuable perspectives to every engagement. Additionally, our team has prior experience serving state and local government agencies, providing them with an in-depth understanding of government operations, staffing needs, budgetary constraints, and the business processes required to provide necessary services to the internal divisions and the constituents the City serves.

Below, we illustrate the overall organization of BerryDunn's Local Government Practice Group. We provide unparalleled expertise and unique insights across these practices, supporting our clients in solving some of their biggest challenges and addressing opportunities to improve and plan.



Enterprise Organizational Development



Parks, Recreation, Libraries



Enterprise Digital Transformation



Community Development and Utility Operations



Technology Management



Health and Community Services



Justice and Public Safety

Our firm provides a full range of professional services—including organizational development, technology planning, business process improvement, cost of service and financial analysis, community services planning, and more—supporting our ability to complete tasks outlined by the City.

With organizational development as a core tenant of our work, we pleased to offer the following services to benefit the City:

- Strategic planning
- Community/stakeholder engagement
- Leadership development
- Executive coaching
- Organizational change management (OCM)
- Organizational assessment
- Business process improvement
- Performance measurement

Driven by highly specialized organizational development leaders, and supported by more than 325 additional firm resources, BerryDunn's **Enterprise Organizational Development Practice** offers both an intimate project experience and a national perspective to support our clients' desire to transform and innovate. We recognize how important it is that the City establishes partnership with a firm that understands that work of this level of impact requires a guided hand and a tailored approach to meet clients where they are and lead them to where they want to go.

Work of this nature touches all aspects of an organization, including the City's elected officials, staff, stakeholders, community members, and visitors. As such, this initiative requires a layered approach that offers the attention, guidance, and follow-through that will support positive, sustainable, and long-term change.

Our efforts are centered on sound partnership with our clients. We guide projects at various stages and take the time to properly gauge availability and resources to help ensure our clients receive consistent, reliable, and quality service. We support a variety of organizational development initiatives, providing services that include project management, community engagement and facilitation, strategic plan development, implementation planning, and progress monitoring, among others.

Embracing Diversity, Equity, and Inclusion (DEI)

BerryDunn has advanced community, diversity, and empathy in a workplace where people are respected, and heard.

We carry these principles and values into our work with clients, helping ensure that traditionally marginalized communities are heard, validated, and engaged as a standard part of our project approach. We use tools, practices, and methodologies to ensure that our initiatives have widespread reach and work for all people, regardless of race, ethnicity, age, sexual orientation, gender identity or expression, religion, or disability. We also consider the distinct cultural nuances for each community in our approach to this work to help ensure that we meet our clients where they are in the DEI space

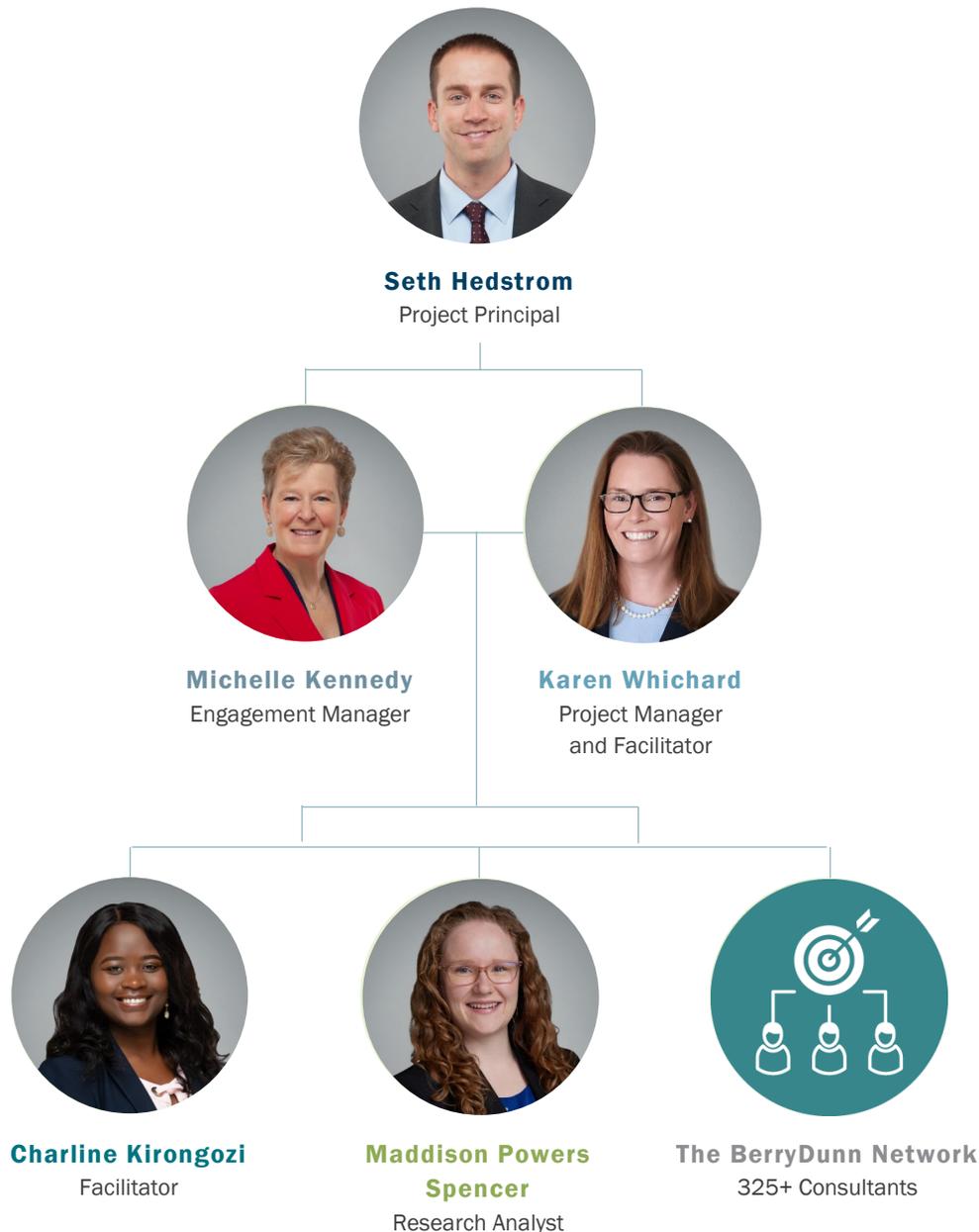
Further, our firm has a CEO Council on Diversity, Equity, Inclusion, Belonging, and Access (DEIBA Council), led by Michelle Kennedy, that makes meaningful progress toward a more equitable workplace.



Partner, supervisory, and staff qualifications/experience

Organizational chart

At BerryDunn, we believe in the synergy that accompanies a team approach. That said, we have carefully assembled a project team with unique and specialized qualifications that coincide with the needs and desired outcomes of the City. **These project team members will remain committed, available, and assigned to perform the City's requested work effort.** Figure 1 describes the organizational structure of our project team, followed by a listing of project staff. It should be noted we do not intend to subcontract any portion of the City's desired scope of work.



Roles, responsibilities, and qualifications

Below and on the following pages, we list our project team members' experience, qualifications, and expertise as it relates to projects of this nature and work with comparable public-sector clients. Our project team members' full resumes can be found in Section 4.



Seth Hedstrom, PMP®, LSSGB | Project Principal

Seth is a principal and the leader of our Local Government Practice Group. He brings extensive experience in project management. He has served as project principal on nearly all BerryDunn's organizational development projects and has managed more than 75 enterprise process and technology planning projects over the course of 14 years with BerryDunn. Seth has led our clients through many of the complex decision points and issue-resolution processes typical of business process analysis and system selection projects and facilitated focused review of business processes needing change. Through this work, he has provided business process improvement services for many clients, either as a stand-alone engagement or as part of an enterprise system selection. His experience includes documenting as-is business processes, benchmarking processes with similar organizations, introducing industry best practices, developing to-be business process recommendations, strategic planning, and organizational assessments.

As the **project principal**, Seth will:

- Maintain overall responsibility for the services provided to the City
- Help ensure the commitment of our firm and appropriate resource allocation
- Review and approve all deliverables in accordance with our quality assurance processes



Michelle Kennedy, Prosci® CCP, ODCC | Engagement Manager

Michelle is a manager in our Local Government Practice Group and has more than 30 years of government-sector management and consulting experience. She is an expert in organizational development, including strategic and business planning, leadership development and executive coaching, organizational assessments, OCM, program evaluation, business process improvement, and performance measurement. Michelle has provided consulting services and project leadership for state and local government agencies throughout the United States. She is a strong facilitator and is certified in several related areas including in the ICA ToP® facilitation methodology. Michelle has facilitated the development and writing of strategic plans for more than 70 public-sector organizations. Michelle has worked on similar initiatives for the cities of Cooper City, Groveland, and Lauderhill, as well as St. Johns County.

As the **engagement manager**, Michelle will:

- Build and maintain a productive relationship with the City
- Participate in meetings with project leadership
- Provide oversight of our project team and project progress
- Engage and support the project team as needed
- Advise on facilitation strategy and strategic plan development
- Provide subject matter expertise, as needed

Roles, responsibilities, and qualifications (continued)



Karen Whichard, Prosci® CCP, MPA | Project Manager and Facilitator

Karen is a senior consultant in our Local Government Practice Group and a seasoned public-sector leader with 19 years of experience in both small and large local governments. Her time with local government organizations ranges from working with a town of 15,000 residents to playing a key role for the City of Charlotte, which is home to nearly 900,000 residents. She boasts a significant track record of successfully building consensus, solving complex problems, and navigating diverse political environments to implement the policy vision of elected bodies. As the **project manager and facilitator**, Karen will:

- Build and maintain a productive relationship with the City
- Serve as the City's primary point of contact
- Lead our work and perform day-to-day project management and staff oversight
- Develop and maintain the Project Work Plan and Schedule
- Lead the analysis and development of project deliverables
- Design the facilitation approach to the strategic planning process
- Facilitate interviews, community forums, and strategic planning sessions
- Present findings and the Final Margate Strategic Plan
- Lead implementation planning efforts if selected to be included in the scope of work



Charline Kirongozi, MPA, Prosci® CCP | Facilitator

Charline is a manager in our Local Government Practice Group and focuses on assisting public-sector clients with project research, facilitation, and analysis support. She is a strong facilitator and is certified in the ICA ToP® facilitation methodology. Charline joins BerryDunn with two years of prior public-sector experience and several years of field experience supporting and conducting field research, data collection, organizational reporting, gap analysis, and recommendations development. Her experience also includes organizing and leading groups through the adoption of new ideas and concepts, and promoting buy-in. She brings in-depth knowledge and involvement with strategic planning, change management, and relationship building through her strong communication, leadership, and project management skills. She is especially skilled at facilitating virtual stakeholder engagement efforts.

As the **facilitator**, Charline will:

- Work with our proposed project manager to design the facilitation approach to the strategic planning process
- Participate in meetings with leadership
- Facilitate interviews, community forums, and strategic planning sessions
- Contribute to deliverable development

Roles, responsibilities, and qualifications (continued)



Maddison Powers Spencer, MPA | Research Analyst

Maddison is a consultant in our Local Government Practice Group. She has firsthand experience serving in the public sector and is familiar with the unique aspects of government operations. Notably, she has been involved in various governmental initiatives, including those related to DEI; sustainability; and process and project analysis and management. Maddison focuses on assisting public-sector clients with strategic planning by supporting research, current environment assessments, data collection, and facilitating community engagement and outreach. She has served as research analyst and facilitator on many local government strategic planning projects.

As the **research analyst**, Maddison will:

- Document engagement and strategic planning outcomes
- Analyze existing data and documentation
- Help assess the City's current environment
- Research best practices and industry standards

Additional resources

Lisa Paradis, MBA, CPRP | Parks and Recreation Subject Matter Expert

Lisa is a manager in our Local Government Practice Group's Parks, Recreation, Libraries Practice. She has more than 25 years' experience as a public Park and Recreation Director, most recently in Brookline, Massachusetts. Lisa has helped many organizations and communities to embrace systemic challenges through action-oriented strategic planning and financial and organizational management. Her approach involves creating and implementing cost recovery plans, feasibility studies, strategic plans, and organizational assessments and understands the importance of a thoughtful, mission driven, community-centric, and implementable approach. Lisa also lives locally.

Michele Weinzetl, Ed. D., Prosci® CCP | Justice and Public Safety Subject Matter Expert

Michele is a senior manager in our Local Government Practice Group. Her background includes more than 17 years as a chief of police for three different Minnesota police departments and several years serving as a subject matter expert, consultant, and adjunct faculty member for the International Association of Chiefs of Police (IACP) Leading by Legacy program. She has extensive experience instructing hundreds of police officers and police executives in the areas of staff and leadership development, organizational management, and policing skills.

Jesse Myott, MA | Finance Subject Matter Expert

Jesse is a senior consultant in our Local Government Practice Group. He has nearly a decade of public-sector experience, focusing on supporting municipalities with operating and capital improvement budget development and management; special fund accounting, revenue and expenditure forecasting; customer valuation; and cost of revenue analyses for municipal programs and services. Jesse has led multiple cost of service and cost allocation projects for local governments from California to Massachusetts.

Similar experience with other government entities

Strategic planning

Below, we provide a representative list of clients for whom our project team members have performed similar services within the last six years. An asterisk indicates that we have been selected to conduct the work; however, work has not yet begun.

- City of Beaverton, Oregon
- City of Cooper City, Florida
- City of Creswell, Oregon
- City of Edgewater, Colorado
- City of Ennis, Texas
- City of Foley, Alabama
- City of Gresham, Oregon
- City of Groveland, Florida
- City of Lauderdale, Florida
- City of Menifee, California
- City of Milton, Georgia
- City of New Braunfels, Texas
- City of Peoria, Illinois
- City of Redlands, California
- City of Springfield, Oregon
- City of St. Charles, Illinois
- City of Tacoma, Washington
- City of Washougal, Washington
- City of Waukesha, Wisconsin
- City of Wausau, Wisconsin
- City of Westminster, Colorado
- DuPage County, Illinois
- Jefferson County, Washington
- Lake County, Illinois
- Lancaster County, Nebraska
- Lane County, Oregon
- Marquette County, Michigan
- Metro Parks Tacoma, Washington
- Orange County, North Carolina
- Oregon Department of Environmental Quality
- Oregon Department of Human Services
- Oregon Harbor of Hope
- San Mateo County, California
- Santa Clara County, California
- St. John's County, Florida*
- Summit County, Colorado*
- Tompkins County, New York
- Town of Holliston, Massachusetts
- Tualatin Hills Parks and Recreation District, Oregon
- Weld County, Colorado



“The BerryDunn team was very organized and demonstrated a great deal of knowledge and experience in strategic planning. We valued their team approach and sensitivity to the unique needs of the City and their facilitation of a process that resulted in a plan we can implement.”

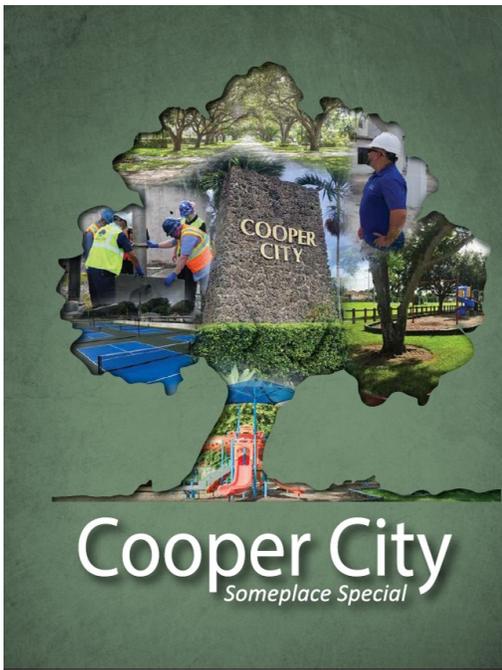


- Marty Nelson, City Manager | City of Ennis, Texas

Significant experiences and references

Below, we provide reference information for several clients who can speak to the quality and satisfaction we deliver on comparable engagements.

City of Cooper City, Florida



*Joseph Napoli, City Manager
954-424-4300 | jnapoli@groveland-fl.gov*

Dates: 04/2021 – 04/2022

Key Personnel: Seth Hedstrom, Project Principal; Michelle Kennedy, Project Manager and Lead Facilitator

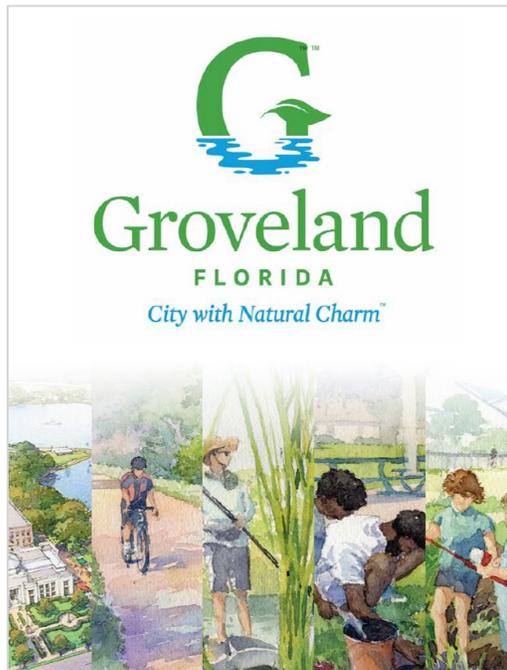
Project Description

After the City engaged BerryDunn to develop a strategic plan, we reviewed existing documents and data; engaged residents, business owners, elected officials, City staff, and executive management to help ensure all voices and opinions were heard. We conducted interviews, meetings, community forums, developed a customized Social Pinpoint site; and facilitated strategic planning sessions. As a result, we uncovered the City’s most pressing challenges, promising opportunities, and important priorities to focus on over the next 10 years and outlined implementation action to encourage and gauge overall success.

Please note: references continue on the following page

City of Groveland, Florida

Strategic Plan



*Timothy Maslow, Community Development Director
352-250-7578 | timothy.maslow@groveland-fl.gov*

Dates: 08/2021 – 07/2022

Key Personnel: Seth Hedstrom, Project Principal; Michelle Kennedy, Project Manager and Lead Facilitator

Project Description

BerryDunn was selected by the City to provide expert guidance related to addressing the changing needs of its residents, businesses, and visitors and developing a citywide strategic plan. This plan was to help plot the City's trajectory, as well as a roadmap, for navigating its inevitable growth. The City sought collaboration in its approach to information-gathering and recommendations development. That said, we provided a mix of independent and partnered activities, including reviewing existing documents and data; conducting interviews; developing a customized Social Pinpoint site; and facilitating a community open house. In addition, we worked with the City's steering committee to facilitate strategic planning workshops. We are currently working with department leadership to develop growth, revenue, and budget forecasting projections; prioritize and sequence capital investments and services; and forecast the City's personnel organizational chart prior to developing the City's strategic plan. The final draft of the strategic plan was adopted by the City Council in June 2022.

City of Ennis, Texas

Strategic Plan



*Marty W. Nelson, City Manager
972-921-4794 | mnelson@ennistx.gov*

Dates: 06/2022 – Present

Key Personnel: Seth Hedstrom, Project Principal; Michelle Kennedy, Project Manager and Lead Facilitator

Project Description

The City engaged BerryDunn to facilitate its strategic planning process, which included the design, development, facilitation, and implementation of a five-year strategic plan. The City requested a special focus on filling the gaps between annual department-based planning and the City's long-range comprehensive plan. Our project team worked with the City to set and refine Citywide strategic priorities, as well as align City departments in implementing these priorities in an adaptive and collaborative manner. The final plan has now been adopted by the City Commission, and our project team is nearing the end of implementation planning.



Commitment to the State

With BerryDunn, the City will be served by a firm and project team members who have **demonstrated their commitment to the State** through similar and other types of consulting engagements with the following clients:

- Alachua County
- City of Boca Raton
- City of Boynton Beach
- City of Cape Coral
- City of Cooper City
- City of Coral Springs
- City of Fernandina Beach
- City of Fort Lauderdale
- City of Gainesville
- City of Groveland
- City of Homestead
- City of Largo
- City of Lauderdale Lakes
- City of Lauderhill
- City of Miami Beach
- City of North Lauderdale
- City of Ormond Beach
- City of Palm Coast
- City of Parkland
- City of Plantation
- City of Port Orange
- City of Port St. Lucie
- City of Sanibel
- City of Tampa
- City of Zephyrhills
- Collier County
- Hillsborough County
- Manatee County
- Monroe County
- Pasco County
- Tampa Port Authority
- Town of Longboat Key
- University of Florida
- Village of Palm Springs
- Village of Pinecrest



An organization's North Star Vision serves as a unifying focal point for long-term achievement. It must be clear enough for stakeholders to know what they are working toward and how to get there. Stakeholders must see their role in this vision and believe in the organization's dream, as they will play a vital role in executing on it.



Approach and guiding methodologies

Our project team will engage the City's elected and appointed officials, staff, residents, community groups, major employees, key partners (such as school districts and the nonprofit community) and other stakeholders in ways that will maximize creativity and innovation and inspire collaboration and consensus for achieving its vision. We will help the City develop a strategic plan that can reasonably be implemented with support and commitment from its stakeholders.

A strategic plan is a living document that defines the organization's reason for being. It establishes a clear and compelling vision; sets measurable objectives and lays out the desired impact on and value added to entire communities—residents, business, employees, and other stakeholders; and helps set a direction and focus and assists in aligning resources to accomplish strategic objectives.

Having a clear, concrete strategic direction will help keep the City on track and focused on what is important when challenges, setbacks, and unanticipated events occur. It also helps ensure decisions, policies, plans, programs, and processes are designed through the lenses of stewardship of resources, equity, and collective impact.

Achieving consensus and quickly moving groups to action

We will design and conduct a well-facilitated strategic planning process that uses data and personal knowledge to assess the City's environment. Our project team will use the ICA ToP® facilitation methodology to help ensure the City's strategic planning sessions are highly collaborative and inclusive of all stakeholders. The ToP® methodology emphasizes structured participation that pulls information into the group's thinking process and creates a clear intention, helping members of the group align with one another and reach consensus. Structured participation encourages the values shown on the following page.

Encouraging crossing boundaries and strengthening interdependencies

Strategies are themes for action, and successful strategies will often cross organizational and community boundaries and appeal to several environmental factors. We will help stakeholders recognize these interrelationships and critical interdependencies, identifying how they align with overall strategic goals.

Approach and guiding methodologies (continued)

Applying effective tools

Another key to success is aligning financial resources of the organization with strategic priorities. When groups have difficulty agreeing on priorities or selecting just a few to focus on, we use a cost-benefit scoring sheet that helps the group score the impacts, risks, level of difficulty, and effort for each strategy or objective to determine the ones to prioritize. We can customize this tool for use with the City's if the group is having difficulty achieving consensus.

Developing clear and compelling plans that articulate a business case

We will write strategic goals, initiatives, and actions in a common language to evoke a clear picture of success to serve as a useful tool for the City's decision-making. Our project team has facilitated clear, compelling strategic plans for 70 public-sector entities and system-level plans involving multiple levels of government, jurisdictions, and agencies. Our clients use these plans to drive budget decisions, execute strategies, and publish the results to communicate with stakeholders and the public.

Focusing on DEI

BerryDunn's approach focuses on and reflects our firm's commit to DEI. We recognize how important it is that we assemble a project team that understands what the City needs to do to conduct a sound strategic planning process. We will work with the City—as well as DEI resources—to help ensure its work effort is conducted through an equity lens and effectively reaches traditional marginalized communities.

With the City serving as a backbone organization, we will engage current partners to facilitate an authentic, inclusive, and accessible planning process. We have found great success in this collaborative approach to assembling the ideal team. As an example, after being selected to lead the City of Wausau, Wisconsin in the development of their strategic plan, the City connected us with a local member of the Hmong community to provide valuable perspective and considerations in the process.

Together, we will exhibit care and respect for others, allowing individuals to speak for themselves and teach us through their own authentic experiences; build trust with the City's stakeholders and establish mutual buy-in this process; and learn as much from you all as you will learn from us, as we all chart the best path toward the City's future. We look forward to coming together to make the City's stakeholders feel heard, respected, and partnered with in this strategic planning process.



Inclusive Participation

Invites and sustains engagement of all members of a group



Teamwork and Collaboration

Gets tasks done in the most effective, efficient, and economical way possible



Individual/Group Creativity

Brings out the best of each person's rationale and intuitive capabilities



Action and Ownership

Positions the group to act on decisions owned and supported by the group



Reflection and Learning

Confirms individual/group resolve and helps ensure appreciation of the value and importance of collective action

Effectively engaging the public

We will utilize several strategies to effectively engage and collect data and information from the public in ways that are both passive and active, including developing communications, conducting interviews and focus groups, and creating an interactive project landing and engagement website via Social Pinpoint.

We need to create a systemic approach to respond to rapid climate change. It is already affecting all aspects of our lives. Let's build a community that care for our own and welcomes climate refugees. Let's plan ahead for infrastructure that eliminates using fossil fuels, and support residents to do the same.

Infrastructure and Services | 2 years ago
Like Dislike -3

Let development/redevelopment happen naturally. Keep the city out of the real estate business, your just not good at it.

Economic Development/Labor Force | 2 years ago
Like +2 Dislike

Wausau is an exceptionally hard city for business owners to deal with. I own several buisnesses, 2 being in Wausau, and this is the worst city government Ive ever had to deal with. As far as development, unless you have the right name or the right connections you are wasting your time. Even if you have plenty of experience Wausau is not development friendly if you are not in the club.

Economic Development/Labor Force | 2 years ago
Like +1 Dislike

Lack of transit to Rib Mountain shopping area is major detriment to the bus system. The bus doesn't go to the major retail in the area since Shopko closed.

Infrastructure and Services | 2 years ago
Like +1 Dislike -1

Better public transportation is needed.

Infrastructure and Services | 2 years ago
Like +2 Dislike

City government should fund organizations involving race based issues to assist and educate the public instead of pushing "proclamations" and "feel good tactics" that have little to no

Approach and guiding methodologies (continued)

Highlighting Social Pinpoint

Social Pinpoint is a customizable community engagement platform that is used to inform stakeholders of project goals, objectives, and progress, and provide opportunities to interact and gather information. This tool has several features that we use frequently and as needed throughout strategic planning projects, such as forums, mapping, an ideas wall, and surveys. It is also important to note that Social Pinpoint is mobile friendly and has Google Translate interface.

With this tool, we will easily be able to set up a landing page and sub-pages for the City to capture the culture of the stakeholders it serves—providing opportunities for participants to contribute to the City's mission, values, vision, and strategic priorities. We will also be able to track analytics and progress in real-time, promote participation, and set up email notifications to help ensure that, even in a remote environment, effective strategic planning and community engagement activities can take place.

We recently developed fully customized Social Pinpoint sites to support the following clients as well as others:

- City of Creswell, Oregon
- City of Groveland, Florida
- City of Ennis, Texas
- City of Lauderhill, Florida
- City of Menifee, California
- City of New Braunfels, Texas
- City of Peoria, Illinois
- City of Redlands, California
- City of St. Charles, Illinois
- City of Wausau, Wisconsin
- City of Washougal, Washington
- City of Westminster, Colorado
- DuPage County, Illinois
- Jefferson County, Washington
- Lake County, Illinois
- Lancaster County, Nebraska
- Lane County, Oregon
- Tompkins County, New York

Work Plan

BerryDunn strives to be flexible when it comes to development and execution of an effective work plan. We understand that no two projects are exactly alike and believe that **one of the primary reasons we have been successful with similar projects is our willingness to be flexible in adapting to our clients' unique needs.**

The figure below presents an overview of our work plan intended to achieve the City's goals and objectives for this important initiative. Our work plan and process is intentionally designed to create a collaborative environment where the City Commission, City Manager and the Executive Leadership team create a Plan that is actionable, realistic, and is aligned to the budget.



PHASE 1: Project Initiation and Management

1.1 Prepare for and conduct an initial virtual project planning meeting. Upon conducting background research to gain more familiarity with the City, we will conduct initial project planning with the City's project team to identify project milestones and expectations for stakeholder engagement in the strategic planning process. We will introduce key team members, clarify project goals and objectives, identify known project constraints, and refine dates and/or tasks, as appropriate. We will discuss our approach for managing communications between BerryDunn and the City, as well as our approach to scope, risk, and resource management. We will also review possible formats for the Final Margate Strategic Plan. These discussions will help us to refine our currently proposed Project Work Plan and Schedule.

1.2 Request and compile documents and data. We will request and compile documentation and data to help us better understand the current environment and inform engagement activities.

Examples include:

- Key performance metric data
- Program descriptions and data
- Past internal and external assessments
- Past strategic plans and associated material, including the City's FY 2018–FY 2022 Strategic Plan
- Other existing planning and policy documents, organizational charts, staffing, and budgeting details
- Data from any previous community and stakeholder engagement efforts that are relevant to development of the Strategic Plan
- Previous surveys of City stakeholders and staff
- Demographic, economic, and community data and forecasted trends from the U.S. Census Bureau, the U.S. Bureau of Labor Statistics, American Community Survey, U.S. Department of Education, Centers for Disease Control and Prevention, the Opportunity Index, and other state and local data sources

Once provided, we will review the documentation and data to help us produce an Environmental Scan that will inform engagement activities.

1.3 Develop a Project Work Plan and Schedule. Based on the information gathered from our initial project planning meeting and document and data review activities, as well as from those details enclosed in this proposal, we will develop

the Project Work Plan and Schedule, which will outline the tasks and timelines for the strategic planning process. The Project Work Plan and Schedule will also include agreed-upon procedures between BerryDunn and the City related to project control, including quality management and deliverable submission/acceptance management. After providing draft versions of these materials in advance, we will facilitate a videoconference with the City's project team to review the drafts and solicit feedback. This videoconference will introduce the City's team to our document review process and provide an opportunity for the City to share input on a critical step in the process. We will incorporate the City's feedback and finalize the documentation before distributing it in final form.

Deliverable 1 – Project Work Plan and Schedule

1.4 Identify strategic planning partners and participants and develop a communications strategy. We will assist the City in developing a stakeholder engagement list. This will include developing communications and messaging to build awareness for the process, its intended outcomes, and opportunities for stakeholders to get involved, as well as to keep City Commission, staff, and community stakeholders informed about the strategic planning process.

1.5 Facilitate project orientation meetings with City elected officials and key staff. We will facilitate project orientation meetings with the City Commission, and key staff. This will be a high-level meeting used to present our strategic planning approach, as well as conduct a visioning exercise with these selected stakeholders to gain trust and buy-in.

1.6 Conduct Biweekly Project Status Meetings. Our project manager, Karen Whichard, will conduct Biweekly Project Status Meetings with the City's project manager on an ongoing basis throughout the strategic planning process. We will use these meetings to describe the activities and accomplishments for the reporting period; plans for the upcoming month; risks or issues encountered during the reporting period; and anticipated problems that might impact project deliverables. We will also use these meetings to highlight any work products and approaches that will contribute to deliverable development.

Deliverable 2 – Biweekly Project Status Meetings

Phase 2: Participant Engagement and SWOT Analysis

2.1 Develop the City's Social Pinpoint site. We will utilize tools and technology that will help to encourage collaboration with the City and its stakeholders. One of these tools, a virtual engagement platform called Social Pinpoint, will be customized to encourage community engagement in the strategic planning process and to gain broad stakeholder input that will be used to inform development of the Final Margate Strategic Plan. We will work in collaboration with the City to help ensure its landing page is built thoughtfully and speaks to its culture. Additionally, within this landing page, the City stakeholders will have access to an external survey, idea wall, and other engagement tools that will help gather information related to the City's current environment and the community's desired vision for the City's future.

2.2 Review and analyze City-provided documents and data. We will review and analyze the documents and data requested in Task 1.2. This will be used to help us produce an Initial Environmental Scan that will inform engagement activities.

2.3 Conduct interviews with City stakeholders. We will conduct individual and group interviews and focus groups with the City's elected officials, senior leadership, key staff, and community stakeholders, as appropriate, to thoroughly review and assess services and the needs of the community. These interviews will be guided by previously developed questions and protocols. Working with these diverse stakeholder groups, we will help ensure alignment and cohesion for the City's strategic direction, as well as generate excitement, promote consensus and buy-in, and encourage participation and involvement in the process.

2.4 Synthesize information gathered and develop the Initial Environmental Scan. We will synthesize information gathered through quantitative and qualitative research, document and data review, Social Pinpoint, and leadership and stakeholder interviews to develop an Environmental Scan. The format will be a highly visual and compelling slide deck and will be used to inform the community forums and strategic planning retreats and is a foundational part of our facilitation methodology. The presentation will provide an overview of the City's current environment; a strengths, weaknesses, opportunities, and threats analysis; and discovery outcomes.

➔ *Deliverable 3 – Initial Environmental Scan*

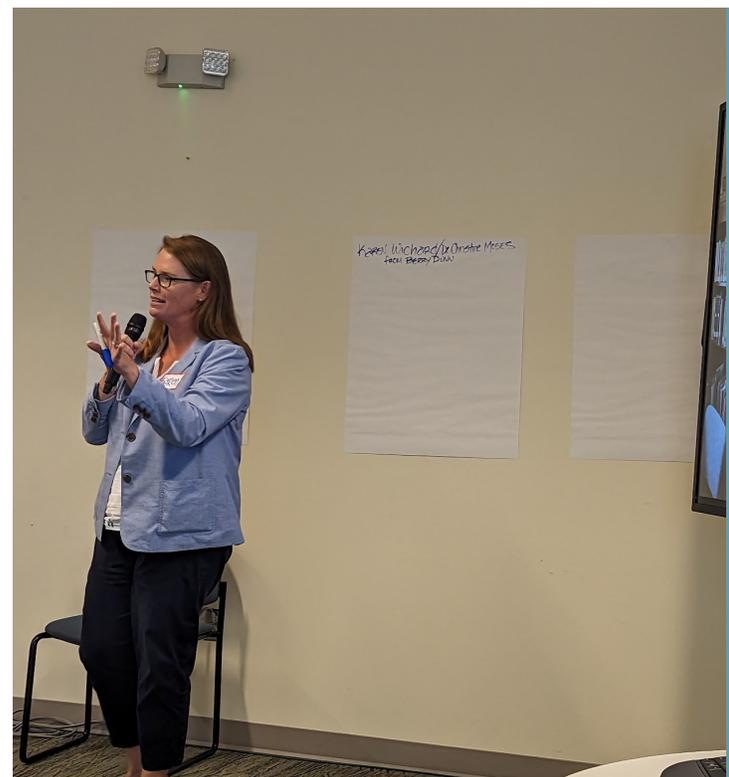
2.5 Design, prepare for, and conduct community forums. Using information gathered to-date and the ICA ToP® facilitation methodology, we will design a community forum format that is structured to educate, inform, and engage all participants in developing a vision for the City. We

will make creative use of digital applications to help ensure forums are engaging and effective. Once prepared, we will facilitate a total of three community forums that can be conducted virtually or in-person to gather perspectives and ideas from the community. We will use the Environmental Scan to educate the community about the current environment of the City.

2.6 Update the Environmental Scan based on community feedback. We will incorporate community forum outcomes in our Environmental Scan, review it with the City's executive leadership team, and solicit feedback before updating it to final. The Final Environmental Scan will guide and inform strategic planning sessions, as well as generate excitement for the process among stakeholders, encourage new ideas, and foster a sense of cohesion and optimism for the future. The Final Environmental Scan will also include a strengths, weaknesses, opportunities, and challenges analysis that will assist in the development of the Final Margate Strategic Plan.

2.7 Present and finalize the Environmental Scan. We will present the Environmental Scan in draft form to the City's executive leadership team during a Bi-weekly Project Status Meeting. We will solicit input, gain consensus, and incorporate requested revisions before updating the Environmental Scan to final form.

Deliverable 4 – Final Environmental Scan



3.1 Develop the meeting design and agendas for Strategic Planning Sessions 1 and 2. We will design and develop agendas for Strategic Planning Sessions 1 and 2. Each session's design and agenda will guide strategic planning progress and will include a presentation of the Environmental Scan to provide participants with a shared understanding of the current environment, the trends that are affecting it, opportunities for the future, and key takeaways from engagement activities. Each in-person session will focus on building consensus and refining the strategic priorities identified, as well as the City's vision and key results. We will review the meeting designs and agendas for each session with the City's project team before updating them to final.

3.2 Facilitate Strategic Planning Session 1. Strategic Planning Session 1 will focus on developing the City's vision, mission, values, strategic priorities, and goals with the City Council. This session will be guided by the previously developed meeting design and agenda, as well as the Environmental Scan. We will use the ICA ToP® facilitation methodology, designed to produce group consensus, to address and resolve any conflicting values or visions. We will document the outcomes of this session to review with the City's project team and plan for next steps.

3.3 Facilitate Strategic Planning Session 2. Strategic Planning Session 2 will be conducted with the City executive leadership team and will focus on developing strategic objectives, actions and performance measures. It will be guided by the previously developed meeting design and agenda, outcomes of Strategic Planning Session 1, and the Environmental Scan. We will document outcomes of this session and review with the City's project team.

3.4 Develop and conduct staff training. We will develop training materials and conduct training for City staff to prepare the City for implementation planning efforts. This will be a thorough review to develop the City's competencies in regard to performance measurement, key metric tracking, and data use in decision making. We will review staff training materials with the City's project team before executing the training session.

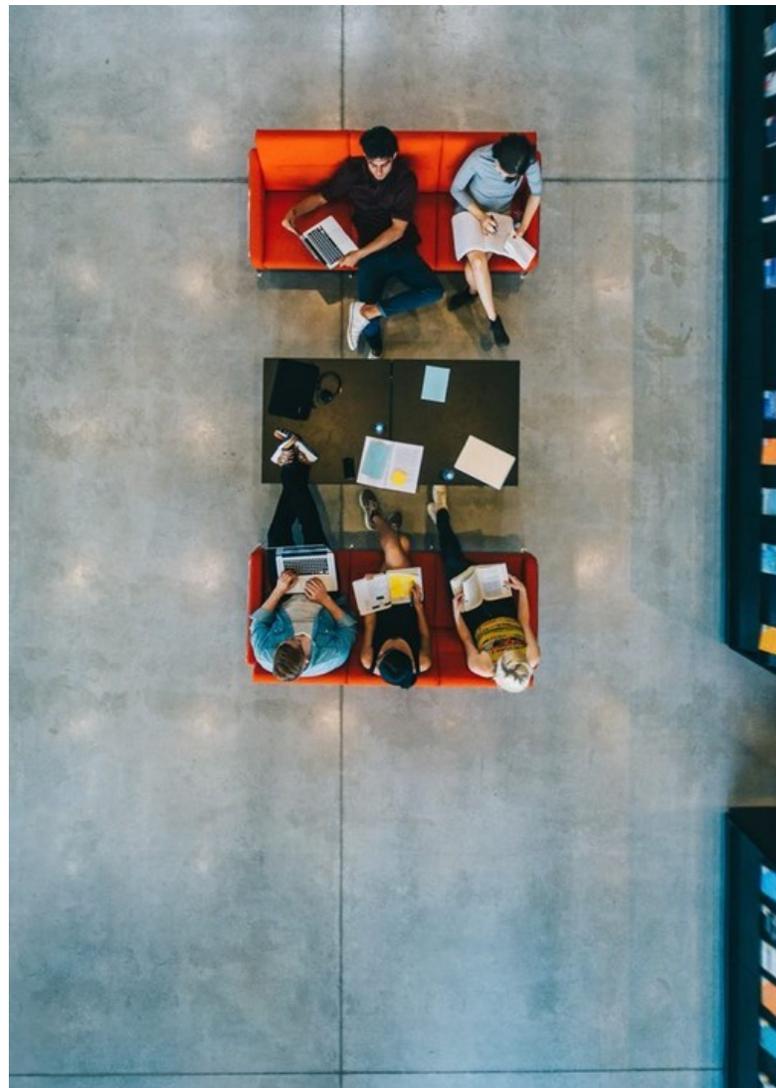
3.5 Develop the Initial Margate Strategic Plan Draft. We will develop the Initial Margate Strategic Plan Draft in an agreed-upon format for the final document. This plan document will include an executive summary, as well as a detailed plan that identifies the City's shared vision, mission, guiding principles, strategic priorities, goals, objectives and performance measures. We will review this draft with the City's project team during a Biweekly Project Status Meeting.

3.6 Present the Initial Margate Strategic Plan Draft. We will prepare a presentation to present the Initial Margate Strategic Plan Draft to the City Council in a work session. This will serve as an opportunity for the City Council to provide feedback and make any final changes.

Deliverable 5 – Initial Margate Strategic Plan Draft

3.7 Develop the Final Margate Strategic Plan. After reviewing the Initial Margate Strategic Plan Draft in a workshop setting with the City Commission and City executive leadership team, we will incorporate requested edits and develop a graphically designed, Final Morgantown Strategic Plan for final approval and adoption. In addition to the content described in Task 3.5, the final document will include a description of the strategic plan development process, the plan for progress monitoring and reporting, as well as the development of a one-page "Plan at a Glance" document that can serve as a standalone high-level summary of the Strategic Plan. The "Plan at a Glance" will follow the design and branding of the full Strategic Plan and include mission and vision statements, guiding principles/values, strategic priorities, strategic goals, and a link to the website where the full Plan can be reviewed or downloaded.

Deliverable 6 – Final Margate Strategic Plan



4.1 Develop the implementation plan template. We will develop an implementation plan template that will identify resources, partners, department and division leads, anticipated timelines, interdependencies, actions, and other information to help enable the plan implementation and progress reporting process. This template will be customized to the City's needs and will serve as a tool to delegate responsibilities, track progress, and assist in the overall longevity and sustainability of the Final the Margate Strategic Plan. Using the template, we will facilitate the City's leadership and staff in developing a completed Implementation Plan that they fully own and are ready to execute.

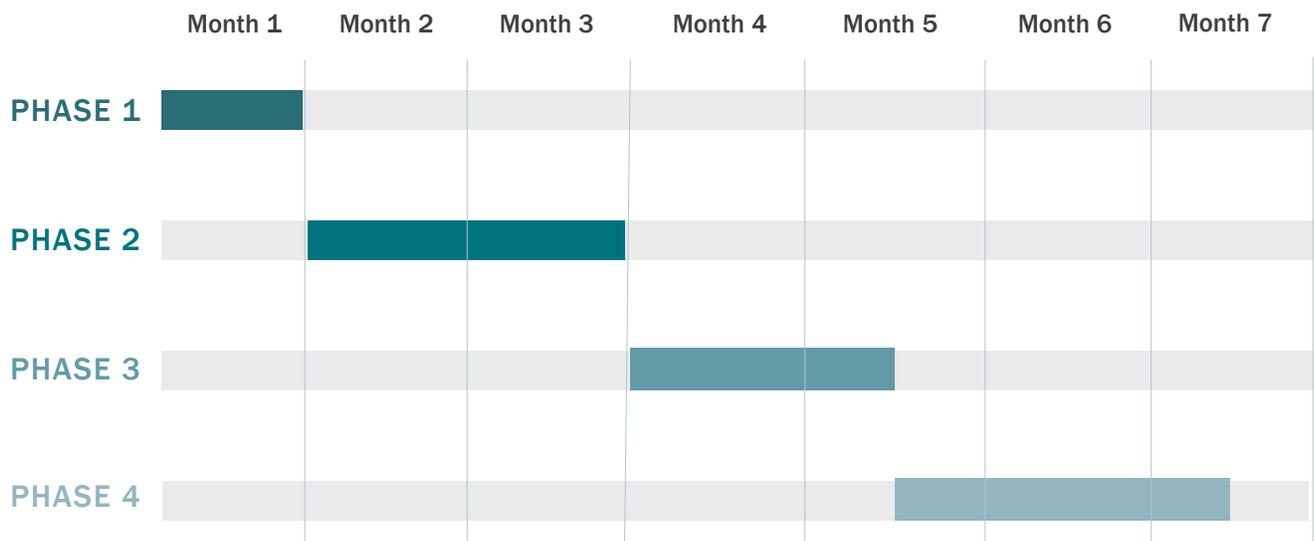
4.2 Develop an annual reporting calendar and quarterly progress reporting templates. We will develop an annual reporting calendar and quarterly progress reporting templates the City can use to report its progress toward the priorities, goals and objectives in the plan. These templates can also be developed to document relevant data and prepare for budget planning and align the Strategic Plan with the City's budget. We will review the templates with the City's executive leadership team and incorporate feedback before updating to final.

Deliverable 7– Implementation Plan and Report Summarizing All Findings

4.3 Conduct project closeout activities. Once the strategic planning effort is complete, we will perform closeout activities, including providing the City with documentation developed and collected during the process, and conducting lessons learned and knowledge-sharing activities. Conducting this task will equip the City with the tools needed to continue to progress toward its vision and to successfully implement its plan, even after the project is complete.

Anticipated schedule

Below, we highlight our proposed project schedule for the City's requested work effort. We are happy to adjust this schedule to best accommodate the City's needs, as appropriate.



Identification of anticipated potential management problems

All projects of this nature experience varying challenges and barriers. Some are anticipated and can be planned for, while others the City may have little control over. To help avoid challenges, our team has spent a considerable amount of time considering potential risks that may negatively impact this initiative and strategies that can be used to address them. Below, we present potential risks and strategies to mitigate them for the City's further review and consideration.



EXECUTIVE SPONSORSHIP

For this project to succeed, City leadership must fully support it and take an active role in key decision-making activities. They must be visible, vocal, and active supporters, communicating the vision for the future. Early on, we will work with City leadership to define their role in effective communications and to gain agreement on the governance and decision-making model employed on the project.



EFFECTIVE PROJECT MANAGEMENT

Managing scope, schedule, and budget helps to ensure the project achieves its intended objectives. In the absence of an experienced individual dedicated to performing these activities, timelines may slip (or not be developed); project objectives may be compromised; and cost overruns may be experienced.



DELAYS IN THE PROJECT TIMELINE

Factors may come into play that will impact the schedule, such as staff availability and time for leadership decision-making related to the project. We will work with the City to mitigate these risks to the timeline through advanced planning and accounting for known absences (such as holidays and vacations) in the schedule, as well as by providing regular updates on progress and relevant matters throughout the project. To address delays over which our team and the City may have less control, we will offer flexibility in how and when we gather the information to keep the project on track.



MANAGING EXPECTATIONS

During project initiation, we will review the project timeline with the city to assess its reasonableness and determine if tasks should be extended across a longer period. In addition, as part of ongoing communication and project management, we will continually assess project progress, factoring in quality. We will raise these risks with the City early to determine the best approach for mitigation, constantly keeping our eye on the bigger picture.



STAKEHOLDER PARTICIPATION

It will be important for the City and key project stakeholder groups to dedicate sufficient resources throughout the duration of the project to help ensure completion of project objectives in a timely manner. We understand that individuals contributing to the initiative have other daily responsibilities that are a priority. As part of our planning activities, we will partner with the City to determine the right staff to involve in each phase of this project based on factors such as subject matter expertise and availability. Our approach attempts to minimize the impact on City staff by having us perform as much work in advance as possible and by engaging stakeholders in ways that promote tangible results and contributions. During project planning, we will also develop a high-level estimate of staffing and resource needs for subsequent project activities and define the roles and time commitments required of each resource.



OCM

BerryDunn has experienced resistance to change in nearly all our engagements, reinforcing our belief that the management of change is crucial to the success of such an initiative. Often, organizations have developed and adhered to existing processes over the course of several years, and staff are reluctant to change their way of doing things. Our team, which includes Prosci® CCPs, is qualified to provide change management structure to this project, where appropriate, in collaboration with the City. It is important for City leaders, frontline managers, and supervisors to understand the drivers of this resistance. Resistance can come from many areas, including staff fears that they will not be able to perform their new responsibilities, their role will be diminished in importance, and/or they may lose their job. That said, it is also important to include staff's input into the assessment so they feel more invested in the changes occurring. Communicating the value of the change by explaining what is in it for staff is a critical component of moving staff along the change management path. We will remain cognizant of, and sensitive to, these factors and perceptions in our communications from project initiation to implementation.



3. PRICE PROPOSAL

Our proposed fixed-fee cost to complete the City’s desired project is broken down by phase in Table 1. Our costs are based on our experience conducting projects of similar size and scope, and the assumption that satisfying a deliverable is based on the City’s signed acceptance. That said, the City will not incur any additional costs associated with the process of reaching deliverable acceptance.

We will utilize our hybrid methodologies through collaborative planning with the City to limit travel expense to the City, as appropriate.

Table 1: COST BY PROJECT PHASE

PHASE	FIXED-FEE COST
Phase 1: Project Initiation and Management	\$ 9,100
Phase 2: Participant Engagement and Strategic Analysis	\$ 22,800
Phase 3: Strategic Plan Development	\$ 21,400
Phase 4: Implementation Planning	\$ 16,300
TOTAL FIXED-FEE SERVICES COST	\$ 69,600
Travel Expense Estimated Allocation Range*	\$ 8,000 – 10,000

**This travel expense allocation represents our best estimate to provide a hybrid approach to service delivery. We would be happy to further discuss and refine this estimate with the City. While our services are proposed as a fixed-fee, we propose to only invoice the City for actual travel expenses incurred.*

4. ADDENDA AND ADDITIONAL INFORMATION

Resumes





SETH HEDSTROM

PMP®, LSSGB

Principal

EDUCATION AND CERTIFICATIONS

BS, Business Management,
Babson College

Project Management
Professional® (PMP®),
Project Management
Institute®

Lean Six Sigma Green Belt
Certified

Diversity and Inclusion
Certificate, Cornell
University

Seth is a principal and leads BerryDunn's Local Government Practice Group and its Enterprise Organizational Development Practice. He has more than 14 years of experience assisting public-sector clients. His experience includes technology planning, organizational needs assessments, system planning and procurement, and the implementation of enterprise-wide information systems. Seth often serves in a leadership role on strategic planning projects and manages and oversees project progress and issue escalation and resolution with executive project sponsors.

RELEVANT EXPERIENCE

Strategic Planning: Seth has served as a project principal on dozens of BerryDunn's strategic planning projects across the country. He has overseen the project management, community engagement, strategic planning, and implementation phases of the strategic planning life cycle for a variety of organizations of different sizes, scopes, and complexities.

Project Management: Seth has served in leadership on most of BerryDunn's local government strategic planning project. He also has managed system selection and IT strategic planning projects for some of BerryDunn's largest local government clients. He helps ensure projects are conducted in a high-quality manner, as well as stay on time and on budget.

Operational and Organizational Assessments: Seth has been involved in numerous operational and organizational assessment projects, which involve current environment analysis, future state planning, and the development of an implementation plan for incremental improvements over a multiyear planning horizon to align with client resources.

Business Process Improvement: Seth has provided business process improvement services for many BerryDunn clients, either as a stand-alone engagement or as part of an enterprise system selection. His experience includes documenting as-is business processes, benchmarking processes with similar organizations, introducing industry best practices, and developing to-be business process recommendations.

KEY CLIENTS

City of Cooper City, FL
City of Edgewater, CO
City of Ennis, TX
City of Groveland, FL
City of Lauderhill, FL
City of Menifee, CA
City of Milton, GA
City of New Braunfels, TX
City of Redlands, CA
City of Springfield, MO
City of St. Charles, IL
City of Washougal, WA

City of Wausau, WI
City of Westminster, CO
DuPage County, IL
Jefferson County, WA
Lancaster County, NE
Lake County, IL
Lane County, OR
Marquette County, MI
Newton County, GA
Orange County, NC
Weld County, CO



MICHELLE KENNEDY

Prosci® CCP, ODCC

Manager

EDUCATION AND CERTIFICATIONS

BA, Journalism/Mass Communication, Iowa State University

Facilitation Methods:

Hogan Leadership Assessment System®
Myers Briggs Type Indicator®
ICA ToP® Facilitation Methodology

Prosci® Certified Change Practitioner

Organization Development Certified Consultant (ODCC)

MEMBERSHIPS/ PRESENTATIONS:

Strategic Planning in Turbulent Times, Oregon Recreation and Park Association (PRPA), 2019

Michelle is a manager in our Local Government Practice Group and brings nearly three decades of consulting experience in organizational assessment, stakeholder engagement, strategic and business planning, leadership development and executive coaching, OCM, program evaluation, business process improvement, and performance measurement. Prior to consulting, Michelle served for 13 years as a senior-level executive in government and higher education.

RELEVANT EXPERIENCE

Strategic Planning: Michelle has developed strategic plans for more than 70 public sector organizations. She actively involves and engages the community, as well as the organization, to gain views for the vision, mission, and goals and helps to prioritize initiatives to yield achievable and measurable outcomes. Most of Michelle’s strategic planning clients have retained her to provide updates.

Organizational Assessments: Michelle is an expert in conducting assessments related to organizational structure and culture, the methods and tools related to the delivery of organizational programs and services, and the culture of the organization. Her reviews also include assessing leadership structures, roles, and styles; methods of knowledge and skill preservation; and succession strategies and plans.

Change Management: Michelle recognizes the importance of change management in all the projects she is involved in. She is well-versed in conducting change readiness assessments, involving key stakeholders in the decision-making process to promote buy-in and build consensus, and actively monitoring project progress to help ensure that resistance is addressed early-on.

KEY CLIENTS

City of Beaverton, OR
City of Cooper City, FL
City of Creswell, OR
City of Edgewater, CO
City of Ennis, TX
City of Gresham, OR
City of Groveland, FL
City of Menifee, CA
City of Milton, GA
City of Lauderhill, FL
City of New Braunfels, TX
City of Redlands, CA
City of San Jose, CA
City of Santa Monica, CA
City of Springfield, OR
City of Washougal, WA
City of Waukesha, WI

City of Wausau, WI
City of Westminster, CO
DuPage County, IL
Jefferson County, WA
Lancaster County, NE
Lane County, OR
Lake County, IL
Marion County, OR
Marquette County, MI
McHenry County, IL
Metro Parks Tacoma, WA
San Mateo County, CA
Tompkins County, NY
Vancouver Housing Authority, WA
Washington County, MN
Weld County, CO



KAREN WHICHARD

MPA, Prosci® CCP

Senior Consultant

EDUCATION AND CERTIFICATIONS

Master of Public Administration, University of North Carolina Charlotte

BA, Journalism and Mass Communication, University of North Carolina at Chapel Hill

Karen is a senior consultant in our Local Government Practice Group and a seasoned public sector leader with 19 years of experience in both small and large local governments. Her time with local government organizations ranges from working with a town of 15,000 residents to playing a key role for the City of Charlotte which is home to nearly 900,000 residents. She boasts a significant track record of successfully building consensus, solving complex problems, and navigating diverse political environments to implement the policy vision of elected bodies.

RELEVANT EXPERIENCE

Strategic Planning: During Karen's time as Assistant Town Manager of Davidson, she directed the creation and adoption of the 2020-2021 two-year strategic plan including managing the biennial town board retreat. While working for the City of Charlotte, Karen served as the lead budget analyst for the Strategy and Budget department where she oversaw budgeting operations and the City's Environmental Focus Area Plan. She also assisted in the development of the City's Strategic Energy Action Plan.

Health and Human Services: As Assistant County Manager for Gaston County, Karen was a member of the Executive Leadership team where she rebuilt the relationship with a key community non-profit active in child welfare and foster care after years of challenges. She also implemented a change management program to improve workplace culture in the DSS child welfare division.

Organizational Assessments and Budget Planning: As a member of the City of Charlotte Strategy & Budget Department, Karen provided operating and capital budget oversight of operating and capital budgets for functions including housing and neighborhoods, code enforcement, solid waste collections and the City's water/sewer utility. This work included analyzing budgets and personnel requests for appropriate staffing levels, evaluating capital needs, benchmarking city services, and ensuring rates and fees were set to meet cost recovery targets. As Assistant Town Manager for Davidson, North Carolina, she managed the Town of Davidson's \$14 million public facilities project as well as \$17 million in general obligation bond projects for parks, greenways and transportation. Part of this work led to the Town of Davidson's first AAA bond rating.

KEY CLIENTS

City of Foley, AL
City of New Braunfels, TX
DuPage County, IL
Lake County, IL
Orange County, NC
Tompkins County, NY



CHARLINE KIRONGOZI

MPA, Prosci® CCP

Manager

EDUCATION AND CERTIFICATIONS

MPA, Clark University

BA, Political Science, Clark University

Certified Associate in Project Management® (CAPM®)

ICA ToP® Facilitation Methodology, Certified

MEMBERSHIPS:

Member, Government Finance Officers Association (GFOA)

Member, International City/County Management Association (ICMA)

Charline is a manager in our Local Government Practice Group with four years of public-sector experience. She is a strong facilitator and is certified in the ICA ToP® facilitation methodology. She focuses on assisting public-sector clients with research and current environment analysis support. She joins BerryDunn with experience supporting and conducting field research, data collection, organizational reporting, and gap analysis and recommendations.

RELEVANT EXPERIENCE

Community Outreach and Engagement: Charline is heavily involved with community outreach and engagement on strategic planning projects. She helps facilitate stakeholder interviews, serves as producer on community forums, and creates Social Pinpoint sites in collaboration with clients to help ensure a comprehensive and inclusive process.

Project Management and Support: Charline has experience as an immigration paralegal, which heavily involved preparing, reviewing, and filing visa petitions, advocating and communicating on behalf of her clients, and overseeing the flow of information processes of the cases, and adhering to the policies set forth by immigration officials.

Business Process Improvement: Charline has in-depth experience with an international perspective conducting field research. This involved collecting data and developing reports, as well as identifying gaps in policies and processes. These gaps translated into developing ways to streamline processes and increase efficiencies.

Public-Sector Research and Analysis: Charline worked on the behalf of the City of Worcester, MA to establish best practices for sustainability of the Worcester/Green Worcester Working Group (Group). Through this work, she led her team through the research of over 30 cities. She reported biweekly status reports/updates, presented findings, identified risks, and made recommendations to the Group. Because of her efforts, Charline received an award from the Massachusetts Chapter of the American Society for Public Administration for best Capstone Project Presentation.

KEY CLIENTS

City of Cooper City, FL
City of Creswell, OR
City of Gresham, OR
City of Groveland, FL
City of Lauderdale, FL
City of Milton, GA

City of Wausau, WI
Lane County, OR
Marquette County, MI
Orange County, NC
Town of Holliston, MA



MADDISON POWERS SPENCER

MPA

Consultant

EDUCATION AND CERTIFICATIONS

MPA, Local Government,
University of North Carolina
at Chapel Hill, School of
Government

BS, Political Science,
Northern Arizona University

PRESENTATIONS

ICMA Conference, 2021,
Portland, OR
How Millennials are
Changing Local Government

Maddison is a consultant in our Local Government Practice Group. She has firsthand experience serving in the public sector and is familiar with the unique aspects of government operations. Notably, she has been involved in various governmental initiatives, including those related to diversity, equity, and inclusion; sustainability; and process and project analysis and management.

RELEVANT EXPERIENCE

Research and Analysis: Maddison is well versed in conducting research and analysis. Notably, she has leveraged survey tools, conducted data analysis, facilitated focus groups, and researched issues of importance to develop recommendations and share findings with organization leadership. As such, her approach is centered on using sound evidence and data to drive decision-making and organizational and operational improvement.

Project Management and Support: Maddison is well-organized and detail-oriented, supporting her in her ability to effectively manage projects and provide support to her colleagues and the clients she serves. She is well versed in documenting outcomes, researching and analyzing documents and data, and managing various priorities to promote success and productivity. In addition, she has experience with scheduling, reporting, and seeking opportunities for business process improvement.

Local Government: Maddison served as a senior fellow within the International City/County Management Association (ICMA) where she managed recruitment, hiring, and the interview process for two assistant city managers. She also led a leadership development initiative to develop more women leaders in the organization, and she managed an annexation study where she interacted with various stakeholder groups to better understand the implications of service delivery.

KEY CLIENTS

Boulder County, CO
City of Ennis, TX
City of Frisco, TX
City of Lauderhill, FL
City of Menifee, CA
City of Redding, CA
City of Richland, WA
City of San Leandro, CA
City of St. Charles, IL
City of Tucson, AZ

City of Washougal, WA
City of Wausau, WI
City of Wheat Ridge, CO
Lake County, IL
Lancaster County, NE Marquette
County, MI
Orange County, NC
Village of Schaumburg, IL
Weld County, CO
Jefferson County, WA

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Foreign Limited Liability Company
BERRY, DUNN, MCNEIL & PARKER LLC

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Principal Address

2211 CONGRESS STREET
PORTLAND, ME 04102

Changed: 04/18/2021

Mailing Address

2211 CONGRESS STREET
PORTLAND, ME 04102

Changed: 04/18/2021

Registered Agent Name & Address

CORPORATION SERVICE COMPANY
1201 HAYS STREET
TALLAHASSEE, FL 32301

Name Changed: 01/25/2007

Address Changed: 01/25/2007

Authorized Person(s) Detail

Name & Address

Title Manager

ERB, C.P.A., DAVID A
2211 CONGRESS STREET
PORTLAND, ME 04102

Title Manager

LEADBETTER, CHARLES K, III
2211 CONGRESS STREET
PORTLAND, ME 04102

Title Manager

MICHAUD, C.P.A., TAMMY P
2211 CONGRESS STREET
PORTLAND, ME 04102

Title Manager

Parker, C.P.A., Kathy
2211 CONGRESS STREET
PORTLAND, ME 04102

Title Manager

Belliveau, C.P.A., Sarah
2211 CONGRESS STREET
PORTLAND, ME 04102

Annual Reports

Report Year	Filed Date
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01/11/2008 -- ANNUAL REPORT	View image in PDF format
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01/23/2006 -- ANNUAL REPORT	View image in PDF format
07/05/2005 -- REINSTATEMENT	View image in PDF format
07/10/2003 -- Foreign Limited	View image in PDF format

OFFEROR'S CERTIFICATION

WHEN OFFEROR IS A PARTNERSHIP

IN WITNESS WHEREOF, the Offeror hereto has executed this Proposal Form this 21st day of November, 2023.

Berry, Dunn, McNeil & Parker, LLC
Printed Name of Partnership

By: [Signature]
Signature of General or Managing Partner

Daphne Edwards
Witness

Seth Hedstrom
Printed Name of Partner

Daphne Edwards
Witness

2211 Congress Street
Business Address

Portland, Maine 04102
City/State/Zip

(207) 541-2200
Business Phone Number

Maine
State of Registration

State of Maine

County of Cumberland

The foregoing instrument was acknowledged before me by means of X physical presence or online notarization this 21st day of November, 2023.

by Seth Hedstrom (Name), Principal (Title) of

Berry, Dunn, McNeil & Parker, LLC (Name of Company) who is personally known to

me or who has produced as identification and who did (did not) take an oath.

WITNESS my hand and official seal.

Daphne Edwards
NOTARY PUBLIC

Daphne Edwards
(Name of Notary Public: Print, Stamp, or type as Commissioned)

RFP No. 2023-016

DAPHNE EDWARDS
NOTARY PUBLIC
State of Maine
My Commission Expires
January 5, 2030



NON-COLLUSIVE AFFIDAVIT

State of Maine)

)ss.

County of Cumberland)

Seth Hedstrom being first duly sworn, deposes and says that:

- (1) He/she is the Principal, (Owner, Partner, Officer, Representative or Agent) of Berry, Dunn, McNeil & Parker, LLC the Bidder that has submitted the attached Bid;
- (2) He/she is fully informed regarding the preparation and contents of the attached Bid and of all pertinent circumstances regarding such Bid;
- (3) Such Bid is genuine and is not a collusive or sham Bid;
- (4) Neither the said Bidder nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affiant, have in any way colluded, conspired, connived or agreed, directly or indirectly, with any other Bidder, firm, or person to submit a collusive or sham Bid in connection with the Work for which the attached Bid has been submitted; or to refrain from bidding in connection with such Work; or have in any manner, directly or indirectly, sought by agreement or collusion, or communication, or conference with any Bidder, firm, or person to fix the price or prices in the attached Bid or of any other Bidder, or to fix any overhead, profit, or cost elements of the Bid price or the Bid price of any other Bidder, or to secure through any collusion, conspiracy, connivance, or unlawful agreement any advantage against (Recipient), or any person interested in the proposed Work;
- (5) The price or prices quoted in the attached Bid are fair and proper and are not tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the Bidder or any other of its agents, representatives, owners, employees or parties in interest, including this affiant.

Signed, sealed and delivered
in the presence of:

Daphne Edwards

Daphne Edwards

DAPHNE EDWARDS
NOTARY PUBLIC
State of Maine
My Commission Expires
January 5, 2030

By:

Seth Hedstrom

Seth Hedstrom

(Printed Name)

Principal

(Title)

ACKNOWLEDGMENT

State of Maine
County of Cumberland

The foregoing instrument was acknowledged before me by means of X physical presence or
 online notarization this 21st day of November,

2023, by Seth Hedstrom, who is personally known to me or
who has produced _____ as identification and who did (did not) take an
oath.

WITNESS my hand and official seal.

NOTARY PUBLIC

Daphne Edwards

Daphne Edwards
(Name of Notary Public: Print, Stamp,
or Type as Commissioned)

DAPHNE EDWARDS
NOTARY PUBLIC
State of Maine
My Commission Expires
January 5, 2030

**OFFEROR'S
QUALIFICATION STATEMENT**

The undersigned certifies under oath the truth and correctness of all statements and of all answers to questions made hereinafter:

SUBMITTED TO: City of Margate (Purchasing Manager)

ADDRESS: 5790 Margate Boulevard
Margate, Florida 33063

CIRCLE ONE

SUBMITTED BY: _____
NAME: _____
ADDRESS: _____
PRINCIPAL OFFICE: _____

Corporation
Partnership
Individual
Other: Limited Liability Company

1. State the true, exact, correct and complete name of the partnership, corporation, trade or fictitious name under which you do business and the address of the place of business. (Attach corporate documents from the State of Florida (sunbiz.org) to this statement.)

The correct name of the Offeror is: _____

The address of the principal place of business is:

2. If Offeror is a corporation, answer the following:

- a. Date of Incorporation: _____
- b. State of Incorporation: _____
- c. President's name: _____
- d. Vice President's name: _____
- e. Secretary's name: _____
- f. Treasurer's name: _____
- g. Name and address of Resident Agent: _____

3. If Offeror is an individual or a partnership, answer the following:

- a. Date of organization: _____

b. Name, address and ownership units of all partners:

c. State whether general or limited partnership: _____

4. If Offeror is other than an individual, corporation or partnership, describe the organization and give the name and address of principals:

5. If Offeror is operating under a fictitious name, submit evidence of compliance with the Florida Fictitious Name Statute.

THE OFFEROR ACKNOWLEDGES AND UNDERSTANDS THAT THE INFORMATION CONTAINED IN RESPONSE TO THIS QUALIFICATIONS STATEMENT SHALL BE RELIED UPON BY OWNER IN AWARDING THE CONTRACT AND SUCH INFORMATION IS WARRANTED BY OFFEROR TO BE TRUE. THE DISCOVERY OF ANY OMISSION OR MISSTATEMENT THAT MATERIALLY AFFECTS THE OFFEROR'S QUALIFICATIONS TO PERFORM UNDER THE CONTRACT SHALL CAUSE THE OWNER TO REJECT THE PROPOSAL, AND IF AFTER THE AWARD TO CANCEL AND TERMINATE THE AWARD AND/OR CONTRACT.



(Signature)

State of Maine _____

County of Cumberland _____

The foregoing instrument was acknowledged before me by means of X physical presence or _____ online notarization this 21st _____ day of

November _____, 2023, by Seth Hedstrom _____, who is

personally known to me or who has produced _____ as

identification and who did (did not) take an oath.

WITNESS my hand and official seal.



NOTARY PUBLIC

DAPHNE EDWARDS
NOTARY PUBLIC
State of Maine
My Commission Expires
January 5, 2030

Daphne Edwards

(Name of Notary Public: Print, Stamp,
or Type as Commissioned)

Board of Directors:

- Seth E. Webber - Treasurer
- Kathy L. Parker - Secretary
- Sarah L. Belliveau
- Charles K. Leadbetter
- Tammy P. Michaud - Board Chair

Firm Owners (each shareholder holds one share):

- Sno L. Barry
- Sarah L. Belliveau
- William H. Brown
- Michel T. Caouette
- Clinton E. Davies
- Jennifer Elwood
- Danielle Ewing
- Jason Fournier
- Mary E. Jalbert
- Julie A. Keim
- Matthew Litz
- Brandon L. Milton
- Connie J. Ouellette
- William A. Richardson
- Robert S. Smalley
- Lisa Trundy-Whitten
- Jeffrey D. Walla
- Nicole Y. Becnel
- Renee Bishop
- Tammy J. Brunetti
- Eduardo G. Daranyi
- Todd J. Desjardins
- David A. Erb
- Jason Favreau
- Seth D. Hedstrom
- Michael F. Jurnak
- Charles K. Leadbetter
- Tammy P. Michaud
- Lisa Openshaw
- Kathy L. Parker
- Linda L. Roberts
- Charles D. Snow
- Daniel T. Vogt
- Seth E. Webber

Total Owners: 34

Our 65 principals are as follows:

- Regina Alexander
- Divya Arulsamy
- Nicole Y. Becnel
- Shea Berry-Brennan
- William H. Brown
- Mark A. Caiazzo
- Andrea Colfer
- Clinton E. Davies
- Kati Denham
- Ryan Doil
- Jennifer Elwood
- David A. Erb
- Jason Favreau
- Ryan Gough
- Seth D. Hedstrom
- Michael F. Jurnak
- Lisa Kennedy
- Charles K. Leadbetter, III
- Matthew Litz
- Yoko McCarthy
- Tammy P. Michaud
- Lisa M. Openshaw
- Dimitrios Panacopoulos
- Kathy Parker
- Kevin Price
- William A. Richardson
- Zachary Rioux
- Peter Alfrey
- Sno L. Barry
- Sarah L. Belliveau
- Renee Bishop
- Tammy J. Brunetti
- Michel T. Caouette
- Eduardo G. Daranyi
- Scott Davis
- Todd J. Desjardins
- Christopher Ellingwood
- William Enck
- Danielle Ewing
- Jason A. Fournier
- Jonathan Grace
- Mary E. Jalbert
- Julie Keim
- Mark R. LaPrade
- Robert Leonard
- Michael J. Mastroianni
- Barbara J. McGuan
- Brandon Milton
- Connie J. Ouellette
- Emily Parker
- Kristin Perry
- Sue Prior
- Jeffrey A. Ring
- Denny Roberge

- Linda L. Roberts

- Cameron Scott

- Robert S. Smalley

- Lisa Trundy-Whitten

- Tyler Waldrupe

- Seth E. Webber

- Douglas J. Rowe

- Leah Shanahan

- Charles D. Snow

- Daniel Vogt

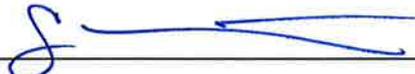
- Jeffrey D. Walla

Scrutinized Company Certification

I hereby swear or affirm that as of the date below this company is not listed on a Scrutinized Companies list created pursuant to 215.4725, 215.473, or 287.135, Florida Statutes. Pursuant to 287.135, Florida Statutes I further affirm that:

- (1) This company is not participating in a boycott of Israel such that it is not refusing to deal, terminating business activities, or taking other actions to limit commercial relations with Israel, or persons or entities doing business in Israel or in Israeli-controlled territories, in a discriminatory manner.
- (2) This Company does not appear on the Scrutinized Companies with Activities in Sudan List where the State Board of Administration has established the following criteria:
 - Have a material business relationship with the government of Sudan or a government- created project involving oil related, mineral extraction, or power generation activities, or
 - Have a material business relationship involving the supply of military equipment, or
 - Impart minimal benefit to disadvantaged citizens that are typically located in the geographic periphery of Sudan, or
 - Have been complicit in the genocidal campaign in Darfur.
- (3) This Company does not appear on the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List where the State Board of Administration has established the following criteria:
 - Have a material business relationship with the government of Iran or a government- created project involving oil related or mineral extraction activities, or
 - Have made material investments with the effect of significantly enhancing Iran's petroleum sector.
- (4) This Company is not engaged in business operations in Cuba or Syria.

VENDOR/COMPANY NAME: Berry, Dunn, McNeil & Parker, LLC

SIGNATURE:  _____

PRINTED NAME: Seth Hedstrom

TITLE: Principal DATE: November 21, 2023

The scrutinized company list is maintained by the State Board of Administration and available at <http://www.sbafla.com/>

DRUG-FREE WORKPLACE PROGRAM FORM

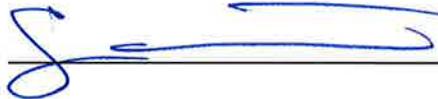
In accordance with Section 287.087, State of Florida Statutes, preference shall be given to businesses with Drug-free Workplace Programs. Whenever two or more bids which are equal with respect to price, quality, and service are received for the procurement of commodities or contractual service, a bid received from a business that certifies that it has implemented a Drug-free Workplace Program shall be given preference in the award process. In the event that none of the tied vendors have a Drug-free Workplace program in effect, the City reserves the right to make final Decisions in the City's best interest. In order to have a Drug-free Workplace Program, a business shall:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendens to, any violation of Chapter 893, Florida Statutes, or of any controlled substance law of the United States of any State, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community by any employee who is convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation.

If bidder's company has a Drug-free Workplace Program, so certify below:

AS THE PERSON AUTHORIZED TO SIGN THE STATEMENT, I CERTIFY THAT THIS FIRM COMPLIES FULLY WITH THE ABOVE REQUIREMENTS.

SIGNATURE OF BIDDER:



DATE: November 21, 2023

**CITY OF MARGATE
E-VERIFY FORM**

Project Name:	City Strategic Plan Consulting Services
Project No.:	RFP 2023-016

ACKNOWLEDGEMENT

Definitions:

“Contractor” means a person or entity that has entered or is attempting to enter into a contract with a public employer to provide labor, supplies, or services to such employer in exchange for salary, wages, or other remuneration.

“Subcontractor” means a person or entity that provides labor, supplies, or services to or for a contractor or another subcontractor in exchange for salary, wages, or other remuneration.

Effective January 1, 2021, public and private employers, contractors and subcontractors will begin required registration with, and use of the E-verify system in order to verify the work authorization status of all newly hired employees. Vendor/Consultant/Contractor acknowledges and agrees to utilize the U.S. Department of Homeland Security’s E-Verify System to verify the employment eligibility of:

- a) All persons employed by Vendor/Consultant/Contractor to perform employment duties within Florida during the term of the contract; and
- b) All persons (including subvendors/subconsultants/subcontractors) assigned by Vendor/Consultant/Contractor to perform work pursuant to the contract with the Department. The Vendor/Consultant/Contractor acknowledges and agrees that use of the U.S. Department of Homeland Security’s E-Verify System during the term of the contract is a condition of the contract with the City of Margate; and
- c) *Should vendor become successful Contractor awarded for the above-named project, by entering into this Contract, the Contractor becomes obligated to comply with the provisions of Section 448.095, Fla. Stat., "Employment Eligibility," as amended from time to time. This includes but is not limited to utilization of the E-Verify System to verify the work authorization status of all newly hired employees, and requiring all subcontractors to provide an affidavit attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien. The contractor shall maintain a copy of such affidavit for the duration of the contract. Failure to comply will lead to termination of this Contract, or if a subcontractor knowingly violates the statute, the subcontract must be terminated immediately. Any challenge to termination under this provision must be filed in the Circuit Court no later than 20 calendar days after the date of termination. If this contract is terminated for a violation of the statute by the Contractor, the Contractor may not be awarded a public contract for a period of 1 year after the date of termination and shall be liable for any additional costs incurred by the City as a result of the termination.*

COMPANY CONTACT INFORMATION

Company Name: Berry, Dunn, McNeil & Parker, LLC
Authorized Signature: 
Print Name: Seth Hedstrom
Title Principal
Date: November 21, 2023
Phone: (207) 541-2200
Email: shedstrom@berrydunn.com
Website: www.berrydunn.com

EXHIBIT C - RFP 2023-016

PRICE PROPOSAL FORM

The rates for each service shall be based on providing the services and associated amenities as per Exhibit B Scope of Services and include all costs, plus all applicable overhead and profit.

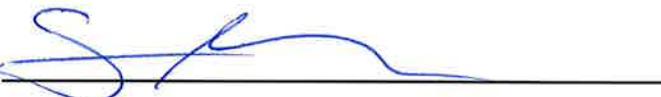
Description of Services	Total Proposal Fee
Total Proposal Fee inclusive of all tasks and deliverables described in Exhibit B Scope of Services	
Proposer shall attach to this page a summary of total project cost broken down by task	\$ 69,600
Total proposal fee will be used as the basis for assigning points in evaluation	

For additional professional services:

STANDARD HOURLY RATE SCHEDULE

Position	Hourly Rate
Seth Hedstrom, Project Principal	\$525
Michelle Kennedy, Engagement Manager	\$340
Karen Whichard, Project Manager and Facilitator	\$290
Charline Kirongozi, Facilitator	\$390
Maddison Powers Spencer, Research Analyst	\$210

Proposer's Name: Berry, Dunn, McNeil & Parker, LLC

Proposer's Signature: 

Date: November 21, 2023

ACKNOWLEDGEMENT FORM

ADDENDUM NO. 1

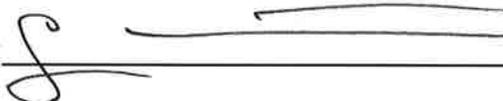
RFP NO. 2023-016

I acknowledge receipt of Addendum No. 1 for RFP No. 2023-016. This addendum contains five (5) pages. Please include the original of this form in your qualifications submission.

Company Name: Berry, Dunn, McNeil & Parker, LLC

Address: 2211 Congress Street Portland, Maine 04102

Name of Signer Seth Hedstrom, Principal
(please print)

Signature:  _____ Date: 11/21/2023

Telephone: (207) 541-2200 Facsimile: (207) 774-2375

Please fax your completed form to (954) 935-5258 or e-mail to purchase@margatefl.com.

Kelly McGilvray

Kelly McGilvray
Buyer II

Friday, November 3, 2023

NOTE: The original of this form must be included with your qualifications submission.



WORK SAMPLES



Cooper City

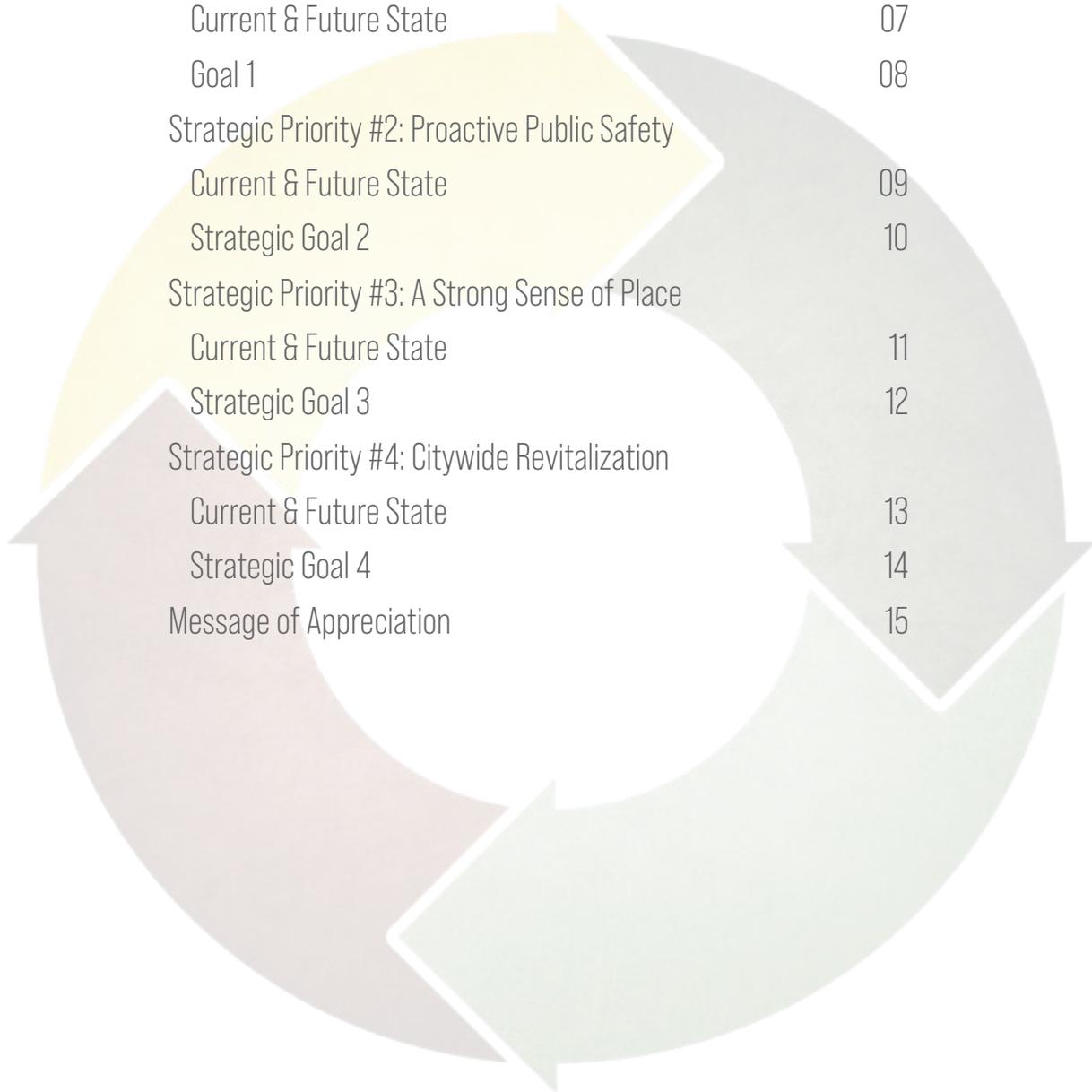
Someplace Special

Strategic Plan 2022-2027

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Mayor's Message



The City of Cooper City has grown and evolved since being founded in 1959, but has never lost the charm and appeal our residents hold dear. The future holds endless opportunities for our community, and our City Commission is excited to build upon the pillars that make our City “Someplace Special.”

This Strategic Plan will be vital in setting the course that will help make our collective vision for Cooper City a wonderful reality. It is important to view this document as a map and understand our success will depend on driving these goals and priorities forward. Our determined and dedicated City Commission and staff are ready to take action, while keeping our residents' input and direction at the center of the decision-making process.

Our residents should take great pride in having a government that consistently looks to improve their quality of life and finds ways to create a better tomorrow. It is through your discussions, insights, and input, that this Strategic Plan was developed. These are your visions and priorities, and we look forward to putting them into action.

Sincerely,
Mayor Greg Ross



Mayor
Greg Ross



Commissioner
Jeff Green
District 3



Commissioner
Massimo “Max” Pulcini
District 1



Commissioner
Howard Meltzer
District 2



Commissioner
Ryan C. Shrouder
District 4

Letter from the City Manager



I am honored to share the City of Cooper City's first-of-its-kind Strategic Plan. This is a living document that creates a framework for the steps needed to meet and surpass our community's needs through the next decade.

This Strategic Plan is the result of a collaborative and comprehensive process that has set major priorities and commitments accompanied by performance measures. After an extensive engagement phase that included input and discussions among citizens, business owners, advisory board members, elected officials, employees, and various stakeholders, our collective efforts fine-tuned our mission, vision, and core values, and set strategic initiatives for the City of Cooper City.



City Manager
Joseph Napoli

I would like to thank Mayor Ross and our City Commission for their support and leadership, which has made this Plan possible, and to our steering committee which took great care and effort in developing this important document. On behalf of our City staff, I would also like to express our appreciation for every community member who provided insights and feedback through surveys, public meetings, and stakeholder interviews.

These are exciting and monumental times for Cooper City as we build upon our successes and, together, lead our community to an even better future.

With Appreciation,
Joseph Napoli



Mission Statement

Every day, Cooper City staff is focused on enriching the lives of our residents and supporting our local businesses by creating a fiscally responsible, friendly, and exemplary environment and providing the highest quality of public services that enable our community to live and prosper.

Core Values

Professionalism

We are high-visibility public servants for our hometown; our quality of work, behavior, attitude, and appearance must always reflect this special role.

Integrity: We are entrusted with creating “Someplace Special;” that privilege must never be abused for personal gain, financial or otherwise; we are committed to actions and decisions that foster accountability and the public’s trust and confidence.

Customer Service

We will consistently treat our residents and businesses with the level of compassion, care, responsiveness, and respect that we would expect if we were in their shoes.

Innovation

We are progressive problem solvers who embrace a culture of innovation, creativity, and outside- the-box thinking; “this is the way it has always been done” is not an acceptable approach or answer in our line of business.

Respect

We treat our colleagues and residents accordingly; with due respect and with the understanding that our individual words and deeds reflect on the entire organization.

Teamwork

We work together collegially, fully focused on achieving our shared organizational goals and setting aside any personal differences that could hinder progress. We work collaboratively with our residents, businesses, and stakeholders to address their needs.

Vision Statement

Cooper City is a charming and peaceful community that features a high quality of life; a diverse, thriving population and local economy; and a live-work-play community with a vibrant city center, a small town feel and sense of belonging.





Current State

Cooper City is dedicated to providing **superior services** through a framework that is effective and fiscally responsible. Programs and services are delivered by a **motivated and flexible staff**, which leverages a wide array of **experience and knowledge**. Under the guidance and direction of elected officials, this **highly professional workforce** plays a major role in sustaining a community, which for decades, has built a strong reputation as the **perfect place to raise a family** in the center of a **diverse and growing** metropolitan area.

Future State

The City recognizes that financially sustaining and **improving the standards** that residents should expect are a function of all departments, elected officials, and external stakeholders. Cooper City envisions a future with **abundant and diversified revenue** sources that build on its **strong foundation**, by **cultivating a collaborative ecosystem** where businesses can flourish and be interwoven with the quaint qualities that symbolize **“Someplace Special.”** This goal can be achieved in maximizing available resources, while increasing efficiency and transparency by utilizing **innovative processes** and implementing **technological advancements**.





Strategic Goal 1

Financially sustain Cooper City as “Someplace Special,” by increasing the city’s financial strength through innovative thoughts and actions, while being mindful of the fiscal impact on residents.

Objectives

- Further diversify and increase the City’s revenue sources to reduce reliance on property tax revenues.
- Expand the commercial tax base with businesses that fit into Cooper City’s vision for the future.
- Increase fiscal and budgetary transparency to strengthen resident’s understanding of the City’s financial processes and visibility of City resources.
- Continue to increase the City’s fund balance to mitigate current and future risks and to ensure stable tax rates.
- Become a more efficient government through the use of technology and data analysis to improve our internal processes minimizing wasting materials, energy, effort, money or time.
- Revise the City’s fee structures to better align with services provided.
- Revise the city’s comprehensive plan to allow for additional land and zoning use.

Performance Measures

Increase revenue stream

- 50% of capital and infrastructure improvement funded through federal and state grants
- 10% increase in revenue
- Increased occupancy rates and revenue through effective RV lot management procedures

Expand tax base

- All commercial centers are at full capacity
- All land parcels within the City’s jurisdiction are accurately reported to ensure maximum revenue

Increase fiscal transparency

- The City is ADA compliant on all of its platforms
- The City regularly promotes its financial transparency to the public and stakeholders
- Website statistics show an increasing trend over time of “hits” to the City’s transparency webpage and data dashboard

Increase fund balance

- Completed study that identifies and recommends the appropriate fund balance for the City
- Ongoing annual contributions to the fund balance
- Completed rate/funding study for General Fund capital improvements

Explore new efficiencies through technological improvements

- Internal processes are measured indicating minimized wasted materials, energy, effort, money and time
- An Innovation Academy has been created that teaches employees techniques in process improvement through process mapping, waste identification and experiment design
- The City has implemented Electronic Permitting and Plan review that results in cost savings through the reduction of paper, re-work and time consuming in-person visits
- The City’s utility billing system is modernized resulting in increased collections and revenues



Current State

The City's elected officials and staff are committed to providing responsive, high-quality public safety services that meet and aim to exceed the community's needs. Cooper City is consistently ranked among the safest places to live in the State of Florida thanks to the work of law enforcement and fire rescue personnel who serve with the highest standards of honesty, communication, engagement, and ethics.

Future State

Cooper City addresses the community's public safety issues using proactive tools and methods. Expected growth in population will necessitate investments in technological capabilities that improve traffic management and safety, while also deterring crime and decreasing the City's already low-level crime rate. The ongoing enhancements combined with the highly dedicated and engagement-driven boots on the ground will further increase the quality of life of those who work, live, and play in Cooper City.





Strategic Goal 2

Provide proactive public safety through a commitment to professional services and innovative processes so the quality of life and well-being of residents is continually improved.

Objectives

- Improve fire and police response times to ensure the well-being of residents.
- Invest in technological capabilities to enhance the overall delivery of public safety services and enhance the safety of residents and the community.
- Maintain a low-level crime rate to maintain and enhance the quality of life in Cooper City.
- Develop an interactive and engaged relationship with the community through implementation of a robust community policing program
- Conduct and complete a city-wide traffic calming study to reduce traffic speeds and congestion in and around school zones.

Performance Measures

Improved traffic management and safety

- Reduced traffic fatalities, traffic injuries, and property damage
- Traffic complaints by residents and commuters are reduced by 50%
- City-wide installation of traffic calming devices in areas warranted by appropriate studies

Improve response times

- Patient recovery times are reduced due to quicker arrival and care
- 10% decrease in travel time to emergencies
- Resident satisfaction improves through the reduction of response times

Invest in technological capabilities that enhance public safety

- Increased solvability rate of crime in the city
- Increased deterrence of crime
- Fortify public safety response in times of crisis or pandemic
- Fully operational monitoring network and real-time crime center

Maintain a low-level crime rate

- Decrease part-one crime by ten percent within a year
- Decrease violent crime by twenty percent within a year
- Continue to be designated as one of the safest cities in Florida

Develop an interactive relationship with the community and enhance involvement

- Increase availability of Fire and Life Safety programming
- Increased resident/community satisfaction with police interactions and encounters
- Better leveraging of social media and app-based community groups for citizen-public safety engagement



Current State

Cooper City has distinguished itself by maintaining a “small town feel” at the heart of the South Florida tri-county region. Its nostalgic characteristics provide residents a peaceful setting nestled within a major metropolitan area that provides easy access to a wide-ranging scale of professional services, shopping, dining, and entertainment. With these qualities in mind, Cooper City has maintained its founding principal of developing mostly residential areas accompanied by parks and green spaces for families to enjoy.

Future State

Cooper City will thrive through smart development and creative redevelopment that will increase residents’ affinity for “Someplace Special” and the sense of place their community provides. Projects and proposals are complimented by outreach and sustained communication with residents and business owners; nourishing relationships and encouraging participation in the decision-making process. This special collaboration works toward increasing the value of Cooper City’s homes, attracting business and entrepreneurial endeavors, and increasing the ability for residents to work where they live.





Strategic Goal 3

Establish “a strong sense of place” through creation of unique spaces that foster community pride, increase social interaction and commercial marketability with the purpose of improving economic stability, increasing property values and impacting the memories of Cooper City residents.

Objectives

- Redevelop underutilized spaces to achieve a strong sense of place and increased property values.
- Focus on the Health and Community pillars of the Parks & Recreation strategic plan to increase social interaction and promote the well-being of Cooper City residents.
- Strengthen the connectivity of City-wide facilities, common areas, and business centers
- Engage residents and businesses more fully in the community through citywide marketing and branding.
- Establish strong rapport and relationships with new and existing businesses to improve the economic stability of Cooper City.

Performance Measures

Resident satisfaction with Cooper City as place to live

- Develop City-wide survey to continually gauge residents' interests and collect feedback on City facilities, services, and programs
- Partner with schools to continue to attract high-quality teachers and staff to maintain A-rated schools, while advocating active participation in schools and close partnerships to support school activities
- Conduct an analysis and options for City Commission consideration on developing a city center
- 80% satisfaction rate with recreational experiences
- Assess and adapt programs and services to the needs of residents

Businesses blending with the charm of Cooper City

- 10% increase in the number of residents who own a business in Cooper City or are employed within Cooper City
- Develop survey to gauge business satisfaction and continually receive feedback on factors that are boosting or negatively impacting businesses
- Ensure the Business Expo and Job Fair becomes an annual event
- Robust marketing campaign that helps to attract investment in Cooper City and boost economic development efforts

Connectivity across the city

- Increased access to parks and recreational spaces by walking, bicycling, or by means other than a vehicle
- Secure access to spaces that will allow for the development and/or extension of bike and walking paths, while increasing efforts to secure grants and other funding sources for projects
- WiFi established at all sports complexes and community gathering places



Current State

Through the leadership of Cooper City's elected officials, the City has annually funded and executed a **Capital Improvement Plan** to help ensure our infrastructure's sustainability and capability to deliver critical services. To maintain a **pleasing and attractive appearance** throughout our neighborhoods, the City Commission launched an **initiative to step up education and enforcement** of City codes and ordinances while also supporting **improvements to parks and green spaces**.

Future State

The **beautification and revitalization** of Cooper City's infrastructure and facilities are paramount to meeting the expectations of those who call our City home and to **attracting potential residents and businesses**. Investments will be made to reinvigorate our City's major arteries, common areas, and improve sustainability. The **City is dedicated** to maintaining our **passive parks** and exploring creative plans to improve upon our **sports complexes and green spaces**, which will forever serve as oases for our City's families.





Strategic Goal 4

Maintain and improve the city's infrastructure and appearance to support and ensure a sustainable and beautiful environment.

Objectives

- Revitalize and invest in enhancing the physical appearance of targeted areas including the City's major arteries and monument signs.
- Assess the appearance of citywide parks and green spaces and make enhancement where needed to meet the needs of the community.
- Continue to educate the community on ordinances and citywide efforts of beautification.
- Continue citywide code enforcement to improve the physical appearance of Cooper City.
- Develop and update the capital improvement master plan for the City's water, wastewater, storm water, and roadway infrastructure.
- Develop a long-term, in-depth Capital Improvement Plan for facilities and roadways.
- Create a mobility plan that includes streets, paths, trails, greenways, sidewalks, and street calming.

Performance Measures

Commercial Centers

- Full compliance with City codes
- Landscaping is rejuvenated and/or restored to original site development plans
- City codes are continually updated to ensure that commercial centers and plazas blend in with the charm of Cooper City

Residential Areas

- Residents are fully informed and complying with City codes
- Meet with and/or present to all homeowners associations within the City to provide updates on relevant City codes and revitalization efforts
- 10% decrease of property maintenance code violations

City-wide Plans and Improvements

- Maintain a Pavement Condition Index (PCI) of 75-85 for all City streets
- 100% Drinking Water Compliance Rate
- Distribution System Water Loss equal to or less than 10%
- All funded and approved capital improvement projects have been initiated
- All capital improvement Master Plans are in the procurement process



This Strategic Plan is the result of the combined efforts of our City's residents, elected officials, employees, and stakeholders. The City of Cooper City would like to thank all those who participated in the months-long process of providing knowledge, insights, and information, while also expressing gratitude to the BerryDunn Consulting Team for providing direction and expertise throughout the various stages of information gathering. The City would also like to recognize its Steering Committee, whose members are listed below.

Joseph Napoli, City Manager

Mike Bailey

Chief James Bishop

Jason Chockley

Michael Cobelo

Captain Christopher De Giovanni

Tim Fleming

Brandon Johnson

Darryl McFarlane

Nannette Rodriguez

Kathryn Sims

Carlos Vega

Stacie Weiss



CITY OF
Cooper City
Someplace Special



Groveland

FLORIDA

City with Natural Charm™



STRATEGIC PLAN • JUNE 21, 2022

Strategic Plan – June 21, 2022

Mission Statement:

The City of Groveland is an ecosystem intentionally connecting safety service, and innovation to support a vibrant welcoming community with natural charm.

Vision Statement

Groveland is a collection of towns, villages, and hamlets interweaving a diversity of people into an eco-agrarian landscape, embodying the following core values.



Core Values

Intentionality



We value our shared vision and becoming what we think about. Being intentional means being descriptive on what kind of city we want to be. It means thinking with the end in mind and taking incremental steps toward that vision. The Strategic Plan sets a vision for what we want to become in 10 years, provides actions toward achieving that vision, and is framed around our core values.

We value our connection with nature and with each other. Relationship- building, complete and walkable communities, park and trail systems, and mobility systems are examples for how we enhance our connectivity.

Connectivity





We value our natural and agricultural landscape and know that will enhance our quality of life and will attract others. This value is the result of combining our conservation and eco-agrarian focus areas and bringing about an economic development and tourism strategy that works with those areas of focus rather than against it. Groveland is a local city with a global vision.

Vitality



Knowledge



We value education and lifelong learning. We envision neighborhood scale schools where kids can walk or bicycle to school. Training and certificate programs for agriculture, culinary, construction, art, and the jobs of the 21st century. actions toward achieving that vision, and is framed around our core values.

We value how we treat one another, sharing our knowledge, talents, and resources. Providing everyone with a seat at the table, ensuring equitable access to community services, and taking action in the present moment.

Heart



Informed and Engaged Community

Current State

The City has established a dedicated Communications Division which is committed to providing charming informational content that keeps our communities apprised of charming activities and opportunities the City has to offer. Our current public outreach methods extend beyond digital and include avenues such as press releases, newspaper ads, banners, word of mouth, community presentations, marquee signs and more. A member of the Communications Division is always present at city events and takes pride in providing our residents with commemorative items that families of all ages can enjoy.

Goal Statement

Provide all Groveland community members with inclusive access to informational resources, connecting people to each other and the City's charming culture.

Objectives

1. Partner with local schools to plan, design, and build the schools that are consistent with the City Vision including neighborhood schools, integrated in walkable neighborhoods, with shared facilities such as parks. Start with a prototypical modern schoolhouse.
Core Values: Connectivity, Knowledge
2. Promote parks and open spaces as inclusive central community gathering spaces that bring people together to share knowledge, information, experiences, cultures, and the community's biodiversity. *Core Values: Connectivity, Knowledge, Heart*
3. Expand community access to high-speed broadband to enhance opportunity, innovation, and quality of life. *Core Values: Connectivity, Knowledge*
4. Develop an intentional, multi-faceted campaign and communications strategy to inform the community and create connection around the city's values.
Core Values: Knowledge, Heart, Intentionality
5. Create a leadership engagement program for students, residents, and business owners, to learn and enhance how the community functions. *Core Value: Knowledge*



Performance Metrics

- Percentage of residents enrolled in email blasts
- Percentage of residents attending city-sponsored events
- Increase in residents satisfaction with city communication and engagement (through annual or biannual resident survey)
- Percentage of students in walkable/bikeable distance to schools
- Percentage of residents with access to high speed internet
- Groveland schools rating in Florida Department of Education Annual School Grades Report



Preservation and Conservation

Current State

Lands located within Groveland’s utility service boundary currently comprise approximately 34,000 acres. The City’s Comprehensive Plan calls for a minimum of 60% of these parcels to be protected as conservation or working agricultural lands. Groveland’s Parks Master Plan envisions conservation lands as a key component of the City’s interconnected park system. Additionally, the City is working to protect the night sky from excessive light pollution with its Dark Sky Lighting Initiative. A study is needed to identify the City’s most important parcels for preservation. The City currently has no conservation parks and no designated conservation lands. A partnership with the County focused on prioritized purchases of conservation parcels could be a fruitful outcome of the upcoming Joint Planning Agreement (JPA) process.

Goal Statement

Preserve and enhance our natural environment to connect people to nature, bring vitality to Groveland and ensure shared stewardship of our lands.

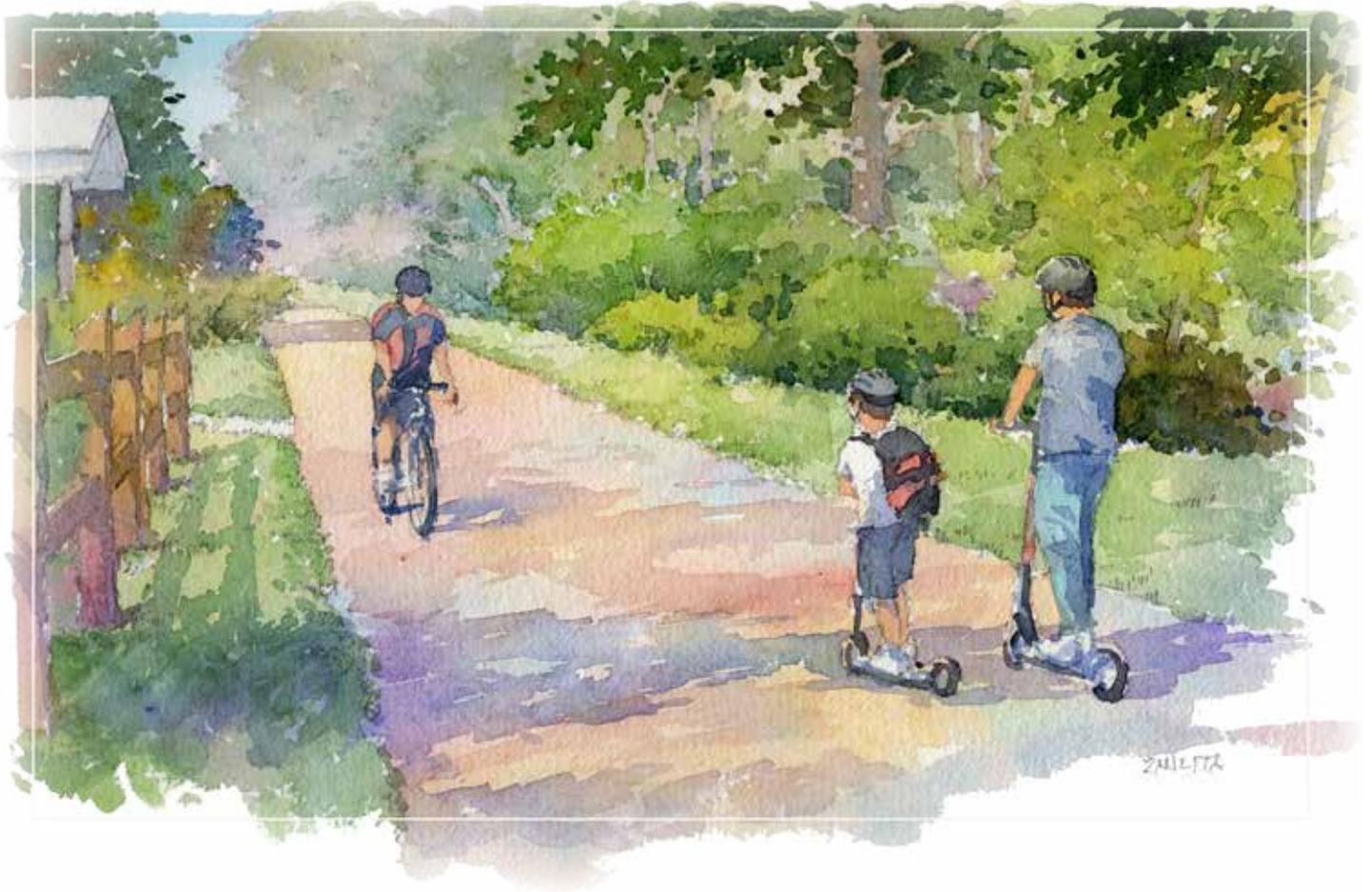
Objectives

1. Identify and preserve historic buildings, landmarks, and districts and the natural and agricultural lands within the city’s utility service area that should be prioritized for preservation. *Core Values: Intentionality and Vitality*
2. Establish a Joint Planning Agreement with Lake County to preserve natural and agricultural lands through, but not limited to, Comprehensive Plan policy updates, a transfer of development rights program, and land acquisition. *Core Values: Intentionality and Vitality*
3. Develop and enhance the City’s programs to preserve our natural systems and green infrastructure, including removal of non-native exotic vegetation, wetland preservation and water and mineral conservation. *Core Values: Intentionality, Connectivity, Vitality, and Knowledge*
4. Expand opportunities for people to responsibly interact with our surroundings by activating more of our natural spaces through educational events and partnerships with agri-civic visionaries, encouraging people to engage with and appreciate these preserved environments. *Core Values: Connectivity, Vitality, and Knowledge*
5. Adopt Dark Sky Lighting Ordinance and achieve International Dark-Sky Association Community designation. *Core Values: Connectivity and Vitality*



Performance Metrics

- Percentage of City's utility service area as conservation "nature"
- Percentage of City's utility service area as preserved agriculture
- Lake water quality



Eco-Agrarian Lifestyle

What is Eco-Agrarian?

Eco-agrarian is a lifestyle that connects Groveland residents and visitors with nature and each other. It provides purpose and support for preserving our natural areas and agricultural lands. It's about how we use these spaces, from outdoor recreation to growing our food, to create a strong sense of place and belonging. It's the feeling you get when you're out kayaking with friends enjoying the water, sunshine, and fresh air. It's an evening enjoying a farm-to-table meal with family underneath the star lit skies. It enhances our quality of life, impact on our environment, and stimulates our local economy. It's the City with Natural Charm.

Current State

Currently, Groveland provides a monthly farmer's market, an aquaponics farm, and opportunities for outdoor recreation (e.g., kayaking the Palatlahaha River, biking the South Lake Trail, and fishing at Lake David). While we have made progress toward cultivating an eco-agrarian lifestyle, there are opportunities to improve: offering farm-to-table restaurants; offering more fresh, natural locally grown and harvested products to residents; encouraging more local growers to attend our farmer's market and to partner with local restaurants; increasing the frequency of local markets; powering parts of the city with renewable energy sources; improving walkability in our downtown and new community types; creating lodging accommodations; developing community and rooftop gardens, and edible landscapes; and encouraging permaculture and organic farming practices. Such steps will move us even closer toward our vision of cultivating an eco-agrarian lifestyle in Groveland.

Goal Statement

Become a close-knit community in which all activities are thoughtfully integrated into existing eco-systems and to enhance healthy development, self-reliance and maintain a continued eco-agrarian way of life.

Objectives

1. Establish a city-supported agriculture program (CSA) "Groveland Grown" to promote healthy locally grown food in the community, creating opportunity for farmers, residents, and merchants. Include certification, marketing, and an indoor/outdoor Groveland Market for agricultural sales and education.
Core Value: Vitality
2. Develop a Waterways Master Plan to coincide with the Parks and Trails Master Plan. Amplify natural recreation opportunities like kayaking, boating, fishing, running, bicycling, equestrian, and gardening, as these are activities for residents and visitors to experience and connect with Groveland's water ways and nature corridors.
Core Values: Intentionality, Vitality, Connectivity



3. Revise the city's Economic Development and Tourism strategies and incentives around eco-activities, lodging, recreation, and local agriculture.

Core Values: Intentionality, Vitality, Connectivity

4. Develop a lodging strategy that coincides with eco-agrarian activities.

5. Explore and implement renewable and sustainable practices for solid waste collection that align with and support an eco-agrarian lifestyle, such as composting.

Core Values: Intentionality and Vitality

6. Hire City personnel to lead environmental and agricultural activities for the city.

Core Values: All

Performance Metrics

- Acres of active farm and vineyard land in Groveland's utility service area
- Number of farm-to-table restaurants
- Solid waste tonnage converted to compost or recycling
- Number of lodging units
- Number of people employed in the eco-agrarian sector



Community Livability

Current State

Groveland has established a momentum toward making community livability and enhancing quality of life for our residents a key priority. Recent accomplishments include a newly renovated Lake David Park and streetscape improvements in Downtown. City Council recently approved a new Parks and Trails master plan including construction plans for Cherry Lake Park. The City's newly adopted Future Land Use and Community Development Code requires more preserved open space with standards that will allow for future squares, plazas, greens, walking paths, and pocket parks integrated within new neighborhoods. These regulatory changes will also result in more walkable communities with enhanced street design and a mix of uses. New master plans for transportation, utilities and schools will meet the growing demand for more health and medical oriented uses as population increases and help achieve the future vision for new schools that are integrated into new neighborhoods, as well as charter school options that will meet the growing demand for quality education.

Goal Statement

Create a community that invites innovation, enhances vitality, provides access to shared resources, and offers diverse choices and opportunities so people can become their best selves.

Objectives

1. Plan, design, and construct a Downtown Lake David project that embodies all Strategic Plan Core Values and serves as a destination. Components may include a compelling lodging experience, a walkable main street, a trail circling Lake David, a nature preserve, farm-to-table restaurants, a market, new civic venues, live/work homes, outdoor activities, dark sky lighting, sustainable landscaping, and public parking. *Core Values: All*
2. Beautify Downtown by continuing to improve streetscapes, business facades, and public spaces. *Core Value: Vitality*
3. Prioritize, phase, and implement the projects in the Parks and Trails Master Plan. Include and prioritize Nature Preserves and connecting Groveland's existing trails to the Florida Coast-to-Coast Trail. *Core Values: Connectivity, Vitality*
4. Partner with Lake County and FDOT to plan, design, and construct improvements for County, State, and City roads that are context sensitive, attractive, and safe for all modes of transportation. Use complete streets and traditional town planning design principles. Prioritize completion of the Coast-to-Coast Trail system within Groveland. *Core Values: Connectivity, Vitality*
5. Plan for a "health village" that serves Groveland residents and others in the region.



A health village is a multi-use environment that integrates healthcare with retail, commercial, education, residential, and wellness services. Health villages not only provide health care services to treat those who are sick but also offer resources and services for people to continue staying healthy and well. *Core Values: All*

6. Prioritize, phase, and implement the projects in the Utilities Master Plan with a focus on water quality and cost-effective upgrades.

Core Values: Intentionality, Connectivity, Vitality

7. Work with developers and builders to meet the growing need for more diverse and affordable housing options. *Core Values: All*

Performance Metrics

- Total linear feet of new streetscapes, new facades, and open spaces in Downtown
- Total miles of trail network completed (City, County, State)
- Total miles of complete streets completed (City, County, State)
- Acres of park land per 1,000 residents (goal is 6 acres per 1,000)
- Acres of park facilities per 1,000 residents (goal is 3 acres per 1,000)
- Drinking water quality, lake water quality
- Vehicular miles traveled



Financial Health

Current State

The City is focused on developing a budget and financial position that is commensurate with a community transitioning from a small town to a new-urbanism city that accentuates its natural features. In developing the budget and the City's financial plan, the objective is to create a sound financial and operational plan that addresses the City's priorities while continuing to provide resources to evolve, grow and support demand for services and enhanced quality of life. In order to maintain fiscal responsibility, the City will create a financial sustainability policy that utilizes the growth from annexations and commercial construction to reduce the overall tax burden on residents. Budget increases and timing will be crucial to the development of future budgets and long-term financial health.

Goal Statement

Achieve financial health while prioritizing the needs of today without sacrificing the ability to meet the needs of future generations.

Objectives

1. Align the City's budget with the Strategic Plan to support achievement of the goals and vision. *Core Values: Intentionality, Connectivity*
2. Develop a debt management program incorporating those attributes of Strong Towns principles that are aligned with the city's Strategic Plan and priorities. Strong Town finance principles state that having more assets than liabilities, in addition to capably paying off debt, is a prerequisite for a city's long-term prosperity. Strong Towns must evaluate the long-term and short-term costs to maintain the success of proposed projects. *Core Value: Intentionality*
3. Create a standardized fiscal analysis that measures projects' fiscal impacts equipping City Council and leadership to make informed decisions when establishing the annual City Budgets. *Core Value: Intentionality*
4. Maintain fiscally responsible tax rates by diversifying the tax base, achieving a healthy balance between land uses, incentivizing development consistent with our vision, and applying user assessments to better address specific services such as stormwater, transportation, conservation, and public safety. *Core Value: Intentionality*
5. Recognizing that Groveland is a safe place, continue to financially prioritize the core services and public safety. *Core Value: Intentionality*



Performance Metrics

- Budget and capital improvements reflecting values and objectives of the strategic plan.
- Annual revenues/expenses on a per acre basis
- City departments directly link their budget requests to strategic priorities in the plan during budget development
- Maintain an ISO Public Protection Classification (PPC) of 3/3x (top 10% of U.S. cities as defined by the nationally recognized standards of the Fire Suppression Rating Schedule) and work toward a rating of 2/2x by 2027.
- Movement, trended year over year, toward a desirable balance of commercial and residential taxes
- Debt management and fiscal analysis standards set based on best practices of the Florida Benchmarking Consortium



STRATEGIC PRIORITY

Implementation

1. Dedicate funds for City leadership to conduct field research in benchmark communities.
Core Values: Intentionality and Knowledge
2. Create a vibrant Downtown Hub, open to residents and visitors. *Core Value: All*
3. Designate an individual or group of individuals to oversee implementation and progress monitoring of the Strategic Plan. *Core Value: Intentionality*
4. Facilitate a process between the adoption of the Strategic Plan and next year's City budget that ensures harmony between the two directive documents. This process should involve City Council, the Strategic Planning Committee, City Staff, and a facilitator. Special emphasis should be placed on how the sequencing of capital improvements either fits into or falls short of the new Strategic Plan recommendations. *Core Value: Intentionality*
5. Hold an annual State of the City addressing both the progress and metrics from the previous year and priorities of the coming year.



Acknowledgements



City Councilmembers

Mayor Evelyn Wilson
Vice Mayor Randolph Waite
Councilman Mike Smith
Councilman Mike Radzik
Councilwoman Barbara Gaines

Strategic Plan Committee Members

Chairman Keith Keogh
Vice Chair Jamie Lowe
Chloe Gentry
Bridgette Bennett
Dr. Roland Nunez
Jose Rubio
Andy Hansen
Bret Jones
Kim Jemison
Tony McCoy

City Leadership and Staff

City Manager, Mike Hein
Community and Economic
Development Director, Tim Maslow
Finance Director, Jo-Anne Drury
Director of Innovation
and Technology, Jose Lopez
Director of Parks and
Community Services, Mike Walker
Director of Transportation
and Public Works, TJ Fish
HR Director, Deo Persaud
Fire Chief, Chief Kevin Carroll
Public Safety Director/ Police Chief,
Chief Shawn Ramsey
Procurement Director, Chris Coghill
City Clerk, Virginia Wright
Planner I and CRA Project Manager,
Brooke Worthington
Administrative Assistant to Community
Development Director, Maria Ramirez
Khrystyna Tremaine
Communications Manager
Ashley Wright
Communications Specialist and
Human Resources Coordinator



Berry Dunn Consultants

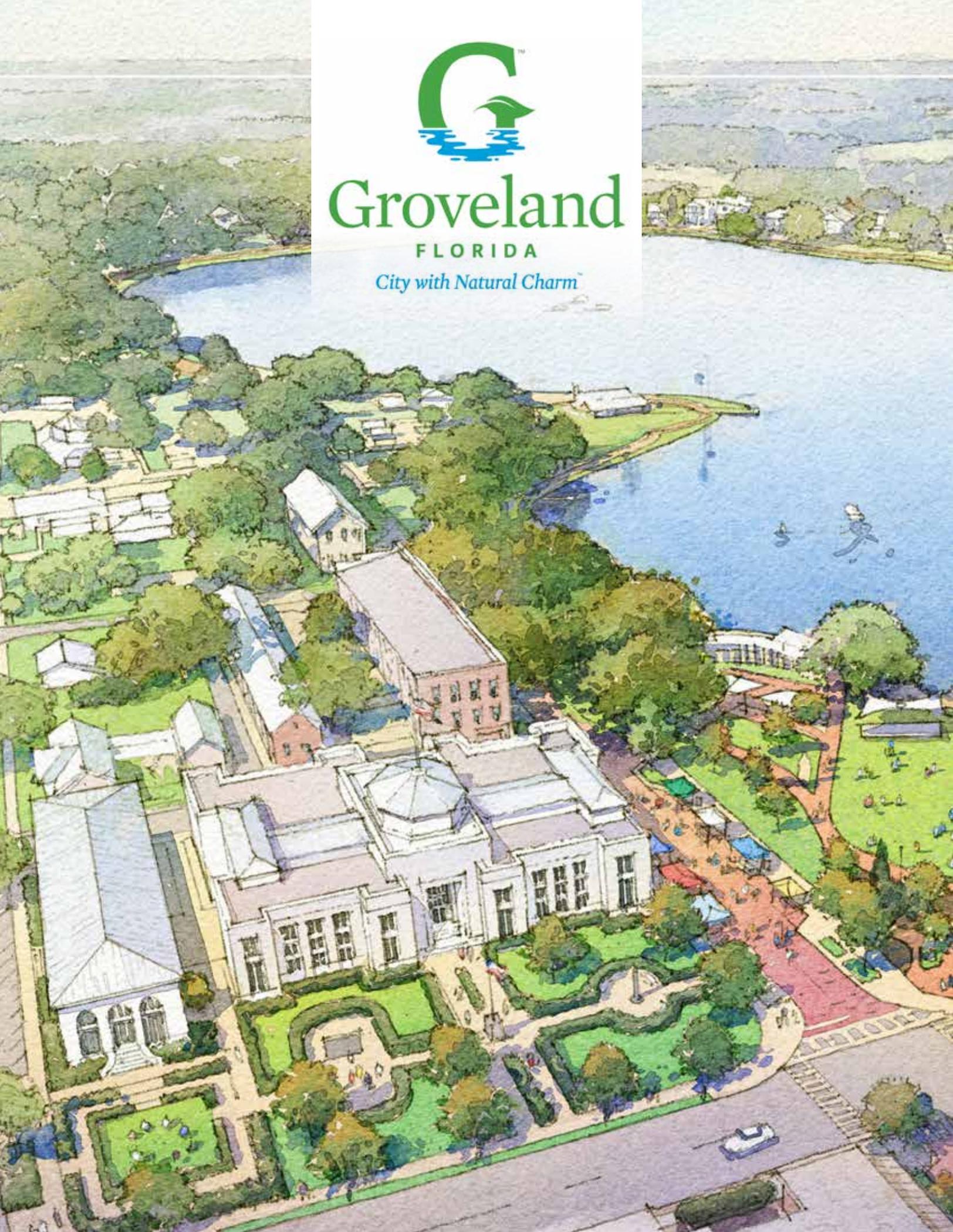
Michelle Kennedy, Project Manager
Charline Kirongozi, Senior Consultant
Jesse Myott, Senior Consultant



Groveland

FLORIDA

City with Natural Charm™






ENNIS
TEXAS

The bluebonnet spirit of Texas
STRATEGIC PLAN • 2023-2028

LETTER FROM THE MAYOR



Dear Ennis Community,

On behalf of our elected officials and City staff, I want to thank you for choosing Ennis as your home. We want you and your families to continue to thrive in Ennis and embrace all the charming qualities we know and love. As a lifelong Ennis resident, it brings my heart so much fulfillment to see our wonderful city on a forward-moving path. Over the last seven years, we have experienced growth and change at a pace we never thought was possible and this is just the beginning! As we move along this path, it is crucial to have a compass to guide us as we serve you. This is the purpose of the city-wide Strategic Plan: to act as a guide to ensure we uphold our commitment to you and are held accountable.



I look forward to seeing this plan in motion as we move toward a bright, prosperous future for Ennis.

Mayor Angeline Juenemann



Greetings from your City Manager

I am writing today to let you know how excited I am about our soon to be minted Strategic Plan. Over the years, we have developed several master plans to include, a Comprehensive Plan, a Downtown Master Plan, a Parks Master Plan, Water & Wastewater Master Plans, and soon we will develop an Airport Master Plan. While these various master plans address specific areas and aspects of making Ennis a better place to live, work and raise a family, it's the Strategic Plan that provides a comprehensive framework to focus the work and priorities of the City staff toward accomplishing specific goals.



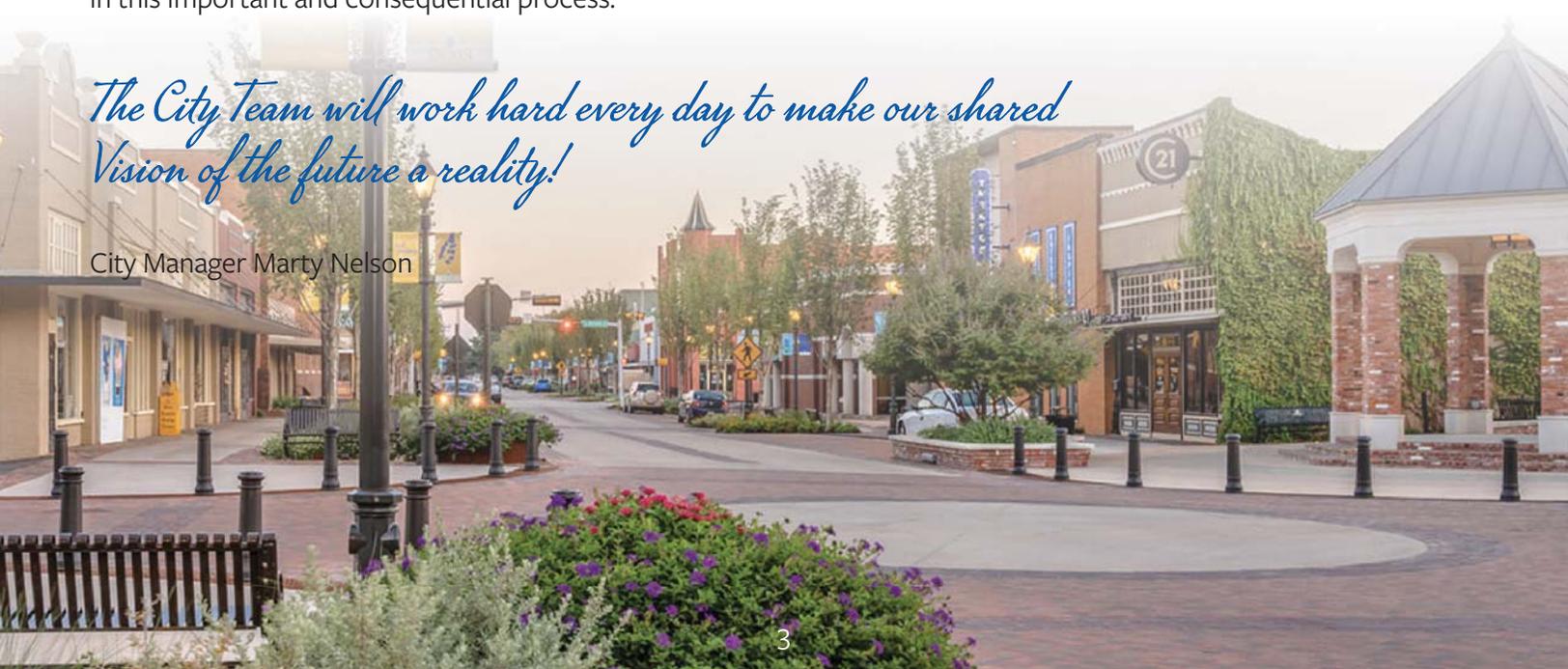
The Strategic Plan is a tangible expression of our representative democracy. We elect members of the community to serve as your representatives on the City Commission and through them, your wants, needs and priorities have become the Strategic Plan. Our Mission Statement describes our purpose and reason for existing. Our Vision Statement defines our desired future and provides direction for where we want to go as a community. Guiding Principles determine how the City staff will conduct its business, make decisions, and deliver programs and services to the community. Strategic Priorities and the supporting Objectives and Performance Measures define the specific things the city staff needs to focus on.

I firmly believe one of the key components driving the growth, prosperity, and improving quality of life in our city is what I call "Strategic Discipline." I am proud of our collective ability and willingness to "stick to the plan" even when it takes many years to fully implement the plan. I am confident the Strategic Plan will lead us into a bright and wonderful future for ours and future generations.

I am especially grateful to our elected officials and the many citizens and stakeholders who actively participated in this important and consequential process.

The City Team will work hard every day to make our shared Vision of the future a reality!

City Manager Marty Nelson



Our Government

The legislative and governing body of the City of Ennis consists of a Mayor, Mayor Pro Tem, and five Commissioners. The City Commission is elected on a non-partisan basis with individual Commission members elected to three-year staggered terms. Five of the Commission members are elected from their respective single member wards. The Mayor and Mayor Pro Tem are elected at large. The City of Ennis has operated under the Commission-Manager form of government since 1956. The City Commission is responsible for passing ordinances, adopting a budget, appointing committees, and hiring the City Manager, City Secretary, City Attorney, and City Judge.

Regular meetings of the City Commission are held the first and third Tuesday of each month at 6:30 P.M. in the City Commission Chambers, 107 N. Sherman St., Ennis, TX 75119.



Angeline Juenemann, Mayor

Jake Holland, Mayor Pro Tem

Rowdy Pruitt, Commissioner Ward 1

Bruce Jones, Commissioner Ward 2

Kameron Raburn, Commissioner Ward 3

Shirley Watson, Commissioner Ward 4

Bill Honza, Commissioner Ward 5



ENNIS TEXAS

The bluebonnet spirit of Texas

Mission Statement



Provide quality services equitably across the bluebonnet city that creates a family-friendly community with a shared sense of belonging sustained for generations to enjoy

Vision Statement



Ennis sustains its small-town atmosphere and identity while promoting growth and development, as well as providing opportunities for all to thrive in a safe, inclusive, and creative community.

Guiding Principles



Transparent and Ethical

We communicate and carry out the city's responsibilities with integrity. We are committed to serving with the highest ethical standards and professionalism.

Financial Responsibility

We manage all resources entrusted to our care for the benefit of current and future generations.

Equity and Fairness

We achieve equitable outcomes by drawing upon community diversity in decision making.

Thoughtful and Innovative

Together with our community partners, we encourage creative and cutting-edge ideas, and apply new thinking and methods to proactively address issues and solve problems at the source.

Approachable and Compassionate Service

We are an open and responsive city government, serving with dignity, respect, empathy, and kindness.

Valuing Our Employees

We continuously invest in the growth, professional development, and well-being of our employees while creating a diverse, friendly, supportive, and productive environment where employees thrive and are engaged.



Building Trust

Safe and Healthy Community

Vibrant Lifestyle

Thriving Economy

Exceptional Public Services

ENNIS TEXAS

Improve the relationship between City staff and the public by providing open two-way communication that creates greater transparency and opportunities for the public to participate in governmental activities.

OBJECTIVES

- Use multiple platforms and media to enhance citizen communication.
- Create more transparent communication opportunities for Police Department policies and procedures to enhance public trust.
- Develop a community engagement strategy to promote citizen involvement in the local government and community.
- Deliver effective and equitable customer service to improve citizens' experience with their city government.
- Provide accurate, consistent, and frequent communication to the public to increase transparency and awareness.
- Establish a bilingual outreach and communication plan to equitably communicate with our community.



PERFORMANCE MEASURES

- Increase communication frequency.
- Increase the diversity of communication mediums.
- Increase the engagement rate through City quarterly email updates.
- Increase number of volunteers for City boards and commissions.
- Increase attendance and participation in civic organizations and activities.
- Increase Police Department community engagement.
- Increase Fire Department community engagement.
- Increase Ennis CARES community engagement.
- Increase number of hours for staff training in customer service.
- Increase participation in quarterly town-hall meetings.
- Finalize bilingual outreach and communication plan before September 2024.



Engage the community through education and outreach, invest in innovative programming, collaborative community partnerships, and provide the resources needed to help ensure public safety and wellbeing for people in Ennis.

OBJECTIVES

- Invest in personnel, training, equipment, technology, and professional education to enhance the delivery of public safety services (code enforcement, fire, health, police, public works, and social services).
- Work to ensure emergency response personnel are professionally trained, equipped and ready to quickly respond to disasters and threats to public safety.
- Implement community-based public safety services to develop an interactive and engaged relationship with the community.
- Collaborate with partners to support programs, initiatives, and services that promote public safety, environmental health, physical health, mental health, and longevity.
- Develop the Community Services Center and partner with other service providers to expand health and human services programming capacity.



PERFORMANCE MEASURES

- Percentage reduction in violent and property crimes that impact quality of life.
- Percentage improvement in response times to Police Department emergency calls as compared to the national standard.
- Percentage improvement in response times to Fire Department emergency calls as compared to the national standard.
- Percentage improvement in alarm answering and alarm processing time as compared to national standard.
- Maintain current ISO Public Protection Classification rating as defined by the Fire Suppression Rating Schedule.
- Increase access to food for community members experiencing hunger.
- Increase available food resources for eligible individuals.
- Increase number of non-duplicated client contacts for individuals and households experiencing food insecurity annually.
- Increase number of partnerships that provide social services support.
- Percentage increase in environmental education events and programming.
- Increase utilization of the Loan-A-Tool program.
- Increase number of hours for City staff safety training annually.
- Mitigate number of accidents by City staff with city vehicles and equipment.
- Increase access to mental health services through partner organizations.
- Percentage increase in voluntary compliance rates for code violations.
- Percentage decrease in number of code violations.
- Percentage decrease in time to resolve a code violation.
- Increase number of volunteers for code enforcement clean-up days.



Elevate life experiences throughout our community by providing residents and visitors with opportunities to enjoy events, entertainment, recreation, nature, and celebrate the City's diverse cultures and historic resources.

OBJECTIVES

- Implement the General Capital Improvement Plan (CIP) to provide the community with projects and facilities that enhance our quality of life.
- Revitalize our parks and enhance recreational opportunities by implementing the Parks Master Plan.
- Support parks and recreation programs, services, and facilities by ensuring equitable access for all.
- Facilitate and promote the use of public spaces for arts, culture, festivals and special events that make people feel welcome and connected to our community.
- Improve the overall beautification, appearance, and environmental sustainability of the city to promote a sense of pride for the community.
- Protect and preserve our heritage and historic resources through thoughtful land use, environmental stewardship, and sustainable practices.
- Improve mobility networks (sidewalks, walking and biking trails) to create a more connected Ennis that supports healthy lifestyles.
- Provide accessible, modern and extensive library services to promote learning, literacy, and overall quality of life.
- Promote improved access to health care, social services, senior services and public transportation to improve the health and wellness of our community.



PERFORMANCE MEASURES

- Implement the CIP.
- Percentage increase in resident satisfaction with parks and recreational experiences/options.
- Increase participation in arts, culture, festivals and special events.
- Increase number of volunteer hours for Keep Ennis Beautiful events.
- Increase number of volunteers for Keep Ennis Beautiful events.
- Increase number of Keep Ennis Beautiful events.
- Increase number of citizen education presentations.
- Increase connectivity of trails, sidewalks and walkways.
- Increase satisfaction in library services.
- Construct the Community Service Center by December 2025.



Expand and grow the City strategically and thoughtfully so business and industry can thrive, residents have access to quality job opportunities, revenue is generated to sustain city government, and Ennis retains its small-town character and identity.

OBJECTIVES

- Encourage development throughout the community, with focuses on Bardwell Lake, Kaufman Corridor, and the Historic Downtown
- Implement the Downtown Master Plan to revitalize the Historic Downtown.
- Promote the City and its unique cultural and natural environment and spectacular wildflowers for tourism, events and activities that serve as our “first impression” with potential residents, investors and developers.
- Promote tourism through expansion of programs, activities, and facilities.
- Actively collaborate with the Chambers of Commerce to support the growth and prosperity of local businesses.
- Create, retain and sustain the growth of quality businesses to diversify the local economy (industrial, commercial, retail and restaurant development).
- Develop and implement a business recruitment strategy that results in higher-than-average wage jobs for Ennis residents.
- Enhance and expand workforce development initiatives to increase access to employment and career opportunities.
- Support residential development while working to ensure new neighborhoods are well planned and configured to support a healthy quality of life.
- Implement a marketing strategy that emphasizes our “Brand Story” and “Brand Identity” to present the City in the best possible light to attract new residents, investors, developers and businesses.
- Develop and implement an Airport Layout Plan to help ensure highest and best use of the municipal airport.



PERFORMANCE MEASURES

- Increase the per capita income.
- Increase the median household income.
- Increase sales tax revenue.
- Upward movement trended for a desirable balance of housing value.
- Increase employment opportunity awareness throughout the City and its partners.
- Increase number of employment opportunities in Ennis.
- Increase number of new businesses.
- Increase number of renovated historic buildings through historic preservation and façade improvement grants.



EXCEPTIONAL PUBLIC SERVICE



Invest in resilient infrastructure and the provision of vital public services that enhance safety, community connectivity, and quality of life.

OBJECTIVES

- Invest in personnel, training, equipment, technology and professional education to enhance the delivery of public services and improve customer service.
- Invest in all critical infrastructure per the CIP to create resilient systems capable of supporting current customers while enabling and supporting new growth and development.
- Develop and implement a Utility CIP based on the Water Master Plan and Wastewater Master Plan to improve and expand quality infrastructure.
- Develop and implement the Pavement Management Plan to guide future investments in street maintenance and repair.
- Implement the Stormwater Master Plan to guide development.
- Develop and implement a plan for sidewalk improvements to enhance mobility.
- Create a customer service center to improve access to information and resolve issues for the community.



PERFORMANCE MEASURES

- Increase number of training hours per employee.
- Increase attendance at annual professional association conferences.
- Mitigate number of employee work-related accidents.
- Maintain required employee certifications.
- Assess the Fleet Replacement Program.
- Implement the CIP.
- Implement the Pavement Management Plan.
- Increase on-site inspections of construction projects.
- Increase sidewalk connections and improvements.
- Increase number of issues resolved through the customer service center.



HOW DID WE BUILD THIS PLAN?



Online interactions with Social Pinpoint

3440



Survey responses **154**



Interviews **12**



Focus groups **10**



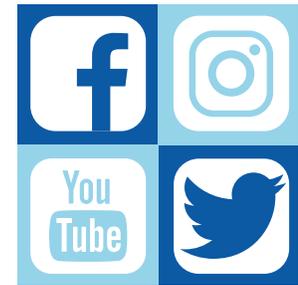
Community forums **2**



Commission workshops **2**



City Leadership meetings **10**



Social media posts **18**



Social media engagements **25000**



Emails in a newsletter **500**

PROJECT TIMELINE



Putting the Plan into Action

Built to endure the changes of a five-year period while staying relevant, this Strategic Plan is high level. This means it says what the City will focus on to achieve the desired future for Ennis. The City's departments will work together to develop detailed implementation plans that lay out the actions required to fulfill each strategic goal and objective.

We are committed to focusing resources on the priorities that best serve the needs and desires expressed by our community and captured in this plan. As needs or opportunities shift during the life of the plan, the City expects to address any needed changes as part of the City's budget process.

The City will also address the six guiding principles identified by the City Commission during the strategic planning process.

Guiding Principles



Transparent and Ethical

Financial Responsibility

Equity and Fairness

Thoughtful and Innovative

Approachable and Compassionate Service

Valuing Our Employees

These guiding principles are expectations for how the City makes decisions and delivers services. Employees will apply these principles in their day-to-day work.

Keeping Track of Progress

How are we doing? We'll let you know.

The City will monitor progress toward our Strategic Plan goals and objectives, as well as report on the performance measures. Tracking keeps us transparent and holds us accountable.

The City will provide the community with an annual report and year-end Commission presentation. Community members can expect to understand what the City is working on and the benefits that will result for residents, businesses, and the community overall.

Monthly

City staff will meet and discuss progress on strategic plan goals and objectives.

Quarterly

City leadership will provide the City Manager with updates on progress toward each strategic priority and goal.

Twice A Year

The City Manager will provide the City Commission with an update on progress toward each strategic priority and goal, including successes and challenges.

Annually

The City Manager will provide a year-end report detailing progress on each strategic goal and objective. The report will be presented to the Commission and posted on the City's website, www.ennistx.gov, for community access.

This strategic plan is a vital tool that will be used to help us better serve our community. It was developed through a combined effort that involved citizens, City staff, elected officials, and key stakeholders. We are thankful to everyone who saw the importance of this plan and dedicated their time over the past few months to bring it to life. We also want to thank the consulting team at BerryDunn for leading this process and providing guidance throughout.

City Commission



Angeline Juenemann, Mayor
Jake Holland, Mayor Pro Tem
Rowdy Pruitt, Commissioner Ward 1
Bruce Jones, Commissioner Ward 2
Kameron Raburn, Commissioner Ward 3
Shirley Watson, Commissioner Ward 4
Bill Honza, Commissioner Ward 5

City Senior Staff



Marty Nelson, City Manager	Irene Kasujja, Human Resources
David Anthony, Capital Projects	Paul Liska, Parks & Recreation
Stephen Barnes, Finance	Becky McCarty, Downtown & Tourism
Ashley Colunga, Marketing	Dustin Munn, Police Chief
Jessica Diaz, Library	Mark Richardson, Planning & Development
Bill Evans, Fire Chief	Angie Wade, City Secretary
Ed Green, Public Works	Jim Wehmeier, Economic Development
Kevin Howard, Health	Chad Wester, Fire Marshal

BerryDunn Consulting Team



Seth Hedstrom, Project Principal
Michelle Kennedy, Project Manager and Lead Facilitator
Sondra Hathaway, Facilitator
Maddison Powers Spencer, Research Analyst



The bluebonnet spirit of Texas

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