BIRMINGHAM CITY COMMISSION SPECIAL MEETING AGENDA WORKSHOP MONDAY, JUNE 13, 2022 6:00 P.M.

WORKSHOP SESSION

This will be considered a workshop session of the City Commission. No formal actions will be taken. The purpose of this workshop is to interview facilitators for Strategic Planning.

I.	CALL TO ORDER		
Theres	se Longe, Mayor		
II.	ROLL CALL		

Alexandria Bingham, City Clerk

III. PRESENTATION & DISCUSSION

- A. Introduction Melissa Fairbairn, Assistant to the City Manager
- B. Managing Results, LLC Jeremy Stephens
- C. Future IQ Heather Branigin
- D. Lew Bender
- E. Conclusion Next Steps

IV. PUBLIC COMMENT

V. ADJOURN

This meeting is open to the public and the public is welcome to attend.

Should you wish to participate in this meeting, you are invited to attend the meeting in person or virtually through ZOOM: https://zoom.us/i/655079760 Meeting ID: 655 079 760

You may also present your written statement to the City Commission, City of Birmingham, 151 Martin Street, P.O. Box 3001, Birmingham, Michigan 48012-3001 prior to the hearing.

NOTICE: Individuals requiring accommodations, such as mobility, visual, hearing, interpreter or other assistance, for effective participation in this meeting should contact the City Clerk's Office at (248) 530-1880 (voice), or (248) 644-5115 (TDD) at least one day inadvance to request mobility, visual, hearing or other assistance. Las personas que requieren alojamiento, tales como servicios de interpretación, la participación efectiva en esta reunión deben ponerse en contacto con la Oficina del Secretario Municipal al (248) 530-1880 por lo menos el día antes de la reunión pública. (Title VI of the Civil Rights Act of 1964).

1 June 13, 2022





Presented by: Melissa Fairbairn, Assistant to the City Manager

Date: June 13, 2022



Workshop Agenda

- Introduction (5 minutes)
- Managing Results, LLC Jeremy Stephens (20 minutes)
 - Formal questions Asst. to the City Manager Fairbairn
 - Commissioner follow up questions
- Future IQ Heather Branigin (20 minutes)
 - Formal questions
 - Commissioner follow up questions
- Lew Bender (20 minutes)
 - Formal questions
 - Commissioner follow up questions



Strategic Planning RFQ Timeline

RFQ posted to MITN April 13, 2022 Deadline for Proposals May 4, 2022

Interviews
June 13, 2022

Contract Awarded
June 27, 2022



Respondent Firms

Firm	Location	Proposed Fee
Managing Results, LLC	Gunnison, CO	\$84,187
Future IQ	Minneapolis, MN	\$78,000
Lew Bender, PhD	Leroy, MI	\$14,500





Interview Questions

- Please briefly explain your approach to strategic planning and the process you would use for the City of Birmingham.
- How would you ensure that the strategic plan that you create will be tailored to the needs of the City of Birmingham?
- What challenges have you encountered while creating a municipal strategic plan? How did you work through these challenges?
- What sets your firm apart from other consultants?
- Follow up questions from Commissioners



Next Steps

- Friday, June 17th → Commissioners complete the Strategic Planning Services evaluation sheet
- Week of June 20th → Selected consultant will contacted
- Monday, 27th→ Contract for Strategic Planning Services will be presented to the City Commission



Strategic Planning Services Consultant Interview Evaluations

Please share your feedback regarding the three (3) strategic planning consultants by Friday, June 17th.

1.	Select your first choice of consultants.
	Mark only one oval.
	Managing Results
	Future IQ
	Lew Bender
2.	Salast your second choice of consultants
۷.	Select your second choice of consultants.
	Mark only one oval.
	Managing Results
	Future IQ
	Lew Bender
3.	Select your third choice of consultants.
	Mark only one oval.
	Managing Results
	Future IQ
	Lew Bender

Google Form



City of Birmingham, MI

Request for Qualifications (RFQ) for a City Strategic Plan

Submitted: May 2nd, 2022

Submitted By:

Managing Results, LLC (MR)
PO Box 746
Gunnison, CO 81230
865-567-5192

jstephens@managing-results.com

City of Birmingham

MA: 4 2022

City Manager's Office

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Cover Letter

Melissa Fairbairn, Assistant to the City Manager City of Birmingham, MI 151 Martin St. Birmingham, MI 48009

Dear Ms. Fairbairn,

Managing Results, LLC. (MR) respectfully submits this proposal in response to the City of Birmingham's Request for Qualifications (RFQ) for a City Strategic Plan and acknowledges the receipt of Addendum No.1 and No. 2.

MR (formerly known as Weidner) was established in 1998 by Marv Weidner and is a firm founded on strategic planning and performance management concepts that are used by local governments, large and small, across the nation. These tools and approaches were developed by Mr. Weidner, who served as the Director of Policy and Strategic Planning for the State of lowa. Created out of a strategic and operational government environment, our services are delivered and continuously refined by the most senior and most successful team in this field.

MR Consultants include some of the nation's foremost experts on jurisdictional and departmental strategic planning, performance measurement and performance budgeting. With successful experience working at the local, state and federal levels of government, the MR team provides unparalleled experience and the ability to respond quickly to the needs of MR's exclusively government customers. Local governments across the country are currently working with MR to create meaningful, actionable strategic plans in a targeted, cost-effective way. In all these cases, the processes and products are embedded in the governments' organizational operations.

MR understands that the City of Birmingham wishes to develop a customer-focused and results-based City Strategic Plan. The City desires a Strategic Plan that goes beyond general statements of good intention to reflect the community's values, address emerging trends and issues and ultimately deliver results through local action. The City wants a Strategic Plan that provides direction that Departments and the Community can count on and specific, measurable results that the community can expect to experience as a consequence of City services.

MR's strategic planning framework supports the dynamic needs of government officials, executives and staff. The practical methodology and comprehensive training and capacity building services characteristic of MR projects are keys to our customers' success — and help to ensure the planning approach is still in continued use years after the initial Strategic Planning process is complete. MR appreciates the opportunity to provide the City of Birmingham with the following proposal.

After more than 23 years of successfully delivering results for our customers, MR stands ready to partner with the City of Birmingham to help ensure its continued success. If you have any questions, please do not hesitate to let us know.

Sincerely,

Jeremy Stephens, Vice President of Development and Operations

(865) 567-5192

istephens@managing-results.com

Firm Background, Principal Officers and Staff Qualifications and Experience

Firm Background

Managing Results, LLC (formerly known as Weidner, Inc.) was founded in 1998 by Marv Weidner following more than 20 years of successful leadership in Iowa State government. From 2000 to 2012, the firm was located in Austin, Texas. In 2012, Marv and his late wife Marty Weidner moved to the Gunnison Valley in Southwest Colorado and rebranded the organization as Managing Results, LLC. (MR).

Over the past 23 years, MR has:

- Assisted over 100 entities all levels of governance military, federal, state, city, county, tourism and various tax supported not-for-profits (see http://managingresults.com),
- Facilitated over 40 organization-wide strategic plans and strategic plan updates
- Developed Department Strategic Plans for over 1,800 departments and agencies,
- Provided Performance Budget design and implementation services to departments and agencies that annually budget over \$37 Billion connected to customer results,
- Facilitated customers' alignment and integration of individual performance with operational performance to successfully implement the organization's Strategic Plan and enhance morale, productivity and overall success,
- Assisted our organizational customers in change management related to implementing their Strategic Plans.
- Assisted our customers in delivering the communications necessary to implement these significant changes in their organization and tell their story of impact.

MR's strategic planning framework supports the dynamic needs of government officials, executives and staff – it is replicable, scalable and sustainable. MR's tools have been continuously refined to help governments articulate their desired results with uncommon clarity. MR customers are able to successfully use Strategic Plans, Implementation Plans, performance measurement and reporting with a degree of consistency and scalability that enables decision-makers to make important trade-off choices in complex political environments – within budget restrictions.

Our engagements include large and complex governments such as Maricopa County, AZ, City of Austin, TX, the District of Columbia, Oklahoma City, OK, City of Long Beach, CA, Nashville/Davidson County, TN, Chester County, PA and small to medium-sized governments like Gahanna, OH, Gunnison County, CO, Galesburg, IL and Ashland, WI.

MR customers use our methodologies to satisfy GFOA's standards of Performance Management, federal Government Performance and Results Acts (GPRA) requirements, and International City/County Management Association's (ICMA's) standards for performance management. Our goal is to provide our customers with the best Strategic Plan possible — one that reflects their organizational culture and goals.

The heart of the approach developed by MR over the past 23 years is to help our customer organizations get focused on results for customers and stay focused in everything they do on those results until they are achieved. Much of MR's work has focused on partnering with local Cities and Counties to help them develop customer-focused results-oriented Strategic Plans that are actionable and make a difference.

A Customer-Focused Strategic Plan

Working with MR, Cities and Counties create Strategic Plans that are focused on measurable results for customers, including timelines for achieving the target. Most Strategic Plans are best characterized as 'general statements of good intention'. Most strategic plans are more like hoping for results, rather than managing for results.

Traditional strategic plans lack a clear customer focus and often are written in terms of what the government will DO rather than what the customer will experience - thus the Plan is (often unconsciously) talking about the organization rather than customers. MR's methodology, known widely as Managing for Results, can be characterized as the 'relentless pursuit of clarity'. Strategic Plans developed with MR's approach leave no doubt about what the City's Strategic Priorities are and what Strategic Goals or experiences the City expects to create for the customers of City services.

MR's approach provides elected officials the ability to both communicate clearly with constituents and provides clear direction to City Departments and staff. An MR facilitated Strategic Plan will communicate with unmistakable clarity that the City is on purpose and focused on results for customers.

MR's approach leads directly to Implementation Plans that are actionable, accountable and manageable. Because the Strategic Plan will include measurable customer results, City Departments can more easily align their operations to achieve the City Strategic Plan, and Budgets can be aligned to support the Plan as well. This is the foundation of building a management system focused on results for customers.

Lastly, because of the qualities of MR facilitated Strategic Plans, cities and counties that have worked with MR have accomplished some remarkable things for their community. By focusing on measurable results and engaging the organization in creating those customer experiences, major accomplishments that had previously been considered out of reach become a reality for the community. And this, more than anything else, builds confidence in the City organization.

Having successfully helped many local governments develop and implement Strategic Plans over the last 23 years, we want to be honest and share that doing this is challenging. The Project itself requires a sustained focus during the planning process as well as ongoing performance-based decisions as the City and its departments implement the City Strategic Plan. There are many things that can deter success including turnover at the administrative top of the organization, fiscal stress during implementation, changes in political leaders and support, organizational culture resistant to change, not enough of the right kind of resources, etc. This is change management at its best, and it requires the best of commitments, the best of partnerships between the City and MR, and a clear and committed mind of the organization that this is important, and success is a must. We have confidence that the City of Birmingham can and will succeed

Representative Projects

Below is a listing of projects where MR has provided similar services to those requested in the RFQ.

- ADAMH Board of Franklin County, OH
- 2. Arvada, CO
- 3. Ashland, WI
- 4. Austin Office of Sustainability, TX
- 5. Baldwin County, AL
- 6. Cannon Beach, OR
- 7. Chester County, PA

- 8. Clackamas County, OR
- 9. CLUB 20
- 10. Colorado Water Quality Control Division
- 11. El Paso, TX
- 12. Federal Highway Administration
- 13. Franklin County, OH
- 14. Gahanna, OH
- 15. Galesburg, IL
- 16. Grand County, CO
- 17. Gunnison, CO
- 18. Gunnison County, CO
- 19. Gunnison-Crested Butte Local Marketing District & Tourism Association
- 20. Hamilton County, OH
- 21. Hawaii (Office of Hawaiian Affairs)
- 22. Interstate Oil and Gas Compact Commission
- 23. Jackson County, MO
- 24. Key Biscayne, FL
- 25. Las Cruces, NM
- 26. Las Vegas, NV
- 27. Long Beach, CA
- 28. Maricopa County, AZ
- 29. Moffat County, CO
- 30. Montrose, CO
- 31. Mt. Crested Butte, CO
- 32. National Aeronautics and Space Administration (NASA)
- 33. Natural Resource Conservation Service
- 34. North Dakota Dept of Health and Human Services, ND
- 35. Office of Hawaiian Affairs, HI
- 36. Ohio (Attorney General's Office)
- 37. Oklahoma City, OK
- 38. Oklahoma Division of Oil and Gas Regulation, OK
- 39. Oregon State Sheriffs' Association
- 40. Park University, Parkville, MO
- 41. Pension Benefit Guaranty Corporation
- 42. Pinal County, AZ
- 43. Port of Long Beach, CA
- 44. Riverton City, UT
- 45. Saguache County, CO
- 46. Savannah, GA
- 47. Sheriff's Office of Pinellas County
- 48. Smithsonian Institution
- 49. United States Forest Service
- 50. United States Marine Corps
- 51. United States Navy, Japan

Availability to Provide Services

While MR is a small company with local presence in Colorado and Tennessee, it has a national reputation for success in Managing for Results (Strategic Planning, Performance Measurement, Performance Based Budgeting, Performance Reporting), customer service, and a very long list of successful customers. We intentionally work with a limited number of customers at one time so we can focus our attention on the relationship with our customers. One of our customers once referred to us as 'freakishly customer-focused.' We aspire to a very high level of customer focus and relationship management and take pride in what our customers say about us.

The advantage in working with a company like MR is our ability to focus on you, the City of Birmingham, as a unique customer and our unfettered ability to make all of our own decisions about how the company conducts our business with you. In other words, we are fully focused on your success, and we do not answer to a corporate hierarchy. As a result, MR Leadership and Senior MR Consultants will be available and participate in all phases of the project.

MR's two Principal Officers will be the Facilitator Team for the City of Birmingham. Vice President of Development and Operations Jeremy Stephens will serve as the main contact and Project Manager throughout the development of the City Strategic Plan. Marv Weidner (Founder and CEO of MR) will serve as his back-up. Jeremy and Marv have worked closely together for over 15 years, and both have served as the Project Manager on numerous MR Strategic Planning Initiatives.

MR's Project Manager will be a constant presence throughout the duration of the project and will serve as the Senior Consultant for all tasks requiring one Consultant (ex: stakeholder engagement activities such as Interviews, Focus Groups, etc.). When an additional Senior Consultant is required to successfully complete the task at hand (ex: Facilitated Strategic Planning Retreat and Implementation Plan Work Sessions), Marv will join Jeremy as his co-facilitator (with Darcie Perkins and Cheryl Feldman serving as back-up resources if needed). It is important to note that MR's Senior person will be onsite for all (or 100%) of the onsite engagements.

Proposed Consultant Team

The distinguishing characteristic of this MR proposal is the unique methodology and the exceptional depth of the Consultant Team's experience. MR's team includes individuals who have themselves had the specific responsibility for developing and implementing customer-focused and results-oriented Strategic Plans in their own government positions and who have provided similar services to dozens of customer jurisdictions.

Marv Weidner – Founder and CEO/Senior Consultant (PRINCIPAL OFFICER)

Marv Weidner has a background of more than 20 years of senior government experience. His last position was Director of Policy and Strategic Planning for the State of Iowa where he led the Governor's Managing for Results efforts that included the development of agency and enterprise strategic planning, performance budgeting and performance accountability systems. For five years prior, Marv was the head of economic assistance policy and led Iowa's highly successful welfare reform initiative. In his first ten years in state government, he led Iowa's innovative refugee resettlement program, recognized by the State Department as the best in the nation.

Marv founded Managing Results, LLC in 1998 and has since led engagements with 100+ organizations across the country delivering strategic planning and performance management products and services. Marv has been the lead consultant for numerous enterprise-wide Managing for Results and cultural change initiatives in some of the nation's best-managed governments. Marv's team has successfully helped some of America's best-managed governments build a fully integrated management system that integrates strategic planning,

program performance, accounting, program-structured/performance-informed budgeting, and individual performance planning. Using MR methodologies, MR's customers now repurpose over \$37 Billion in annual budgets on results for customers. And likewise, Marv and his team have served some very challenged governments.

In addition to being the lead on many of MR's strategic planning engagements, Marv has often been asked to keynote, chair and sponsor national conferences and speak to various graduate level classes. His workshops on Cultural Change Management, Performance Budgeting and Integrated Management Systems Focused on Results and Continuous Improvement consistently receive excellent ratings by participants.

Note: Marv's full resume is available upon request.

<u>Jeremy Stephens – VP of Development and Operations/Senior Consultant (PRINCIPAL OFFICER)</u>
 Jeremy Stephens is the VP of Development and Operations as well as a Senior Consultant for Managing Results, LLC (MR). He has over 18 years of experience in strategic planning and performance management in both the public and private sectors.

Jeremy's role in co-leading Nashville-Davidson County's Strategic Planning/Performance Based Budgeting project and his subsequent 12 years with MR has given Jeremy the opportunity to become a recognized expert in Strategic Planning and Performance Based Budgeting. As a Senior Consultant for MR, Jeremy has facilitated strategic plans and delivered MFR services in Ashland, WI, Galesburg, IL, Baldwin County, AL, Clackamas County, OR, El Paso, TX, Las Cruces, NM, Arvada, CO, Gahanna, OH, Savannah, GA, Maricopa County, AZ, and the ADAMH Board of Franklin County, OH.

Prior to joining MR, Jeremy worked for three years as the Director of Strategic Planning and Performance Management for Ticketmaster Entertainment's online marketing and branding company Echo. While at Echo he spearheaded the company's first comprehensive strategic business planning initiative and managed all aspects of the company's performance reporting that encompassed both internal metrics and metrics pertaining to the company's 250+ entertainment industry clients.

Before joining Ticketmaster in 2007, Jeremy served as the Performance Management Coordinator for the Metropolitan Government of Nashville and Davidson County. During his 5-year tenure at Metro Nashville, he helped drive the government's pioneering deployment of Managing for Results through the facilitation of 20+departmental Strategic Business Plans as well as providing critical consultation, training and technical assistance across all facets of Managing for Results including performance budgeting.

Jeremy is a recognized conference speaker and has had the opportunity to present at a variety of conferences – including GFOA, the Advanced Learning Institute, and the Performance Institute – to share the lessons learned from his experiences creating and implementing strategic plans and performance budgets.

Note: Jeremy's full resume is available upon request.

Cheryl Feldman- Senior Consultant

Cheryl Feldman is a Senior MR Consultant with 10 years of experience in municipal government with the City of El Paso, TX. She served for two years (2012-2014) as the Strategic Planning Coordinator for the Office for Management and Budget using the MFR methodology. During that time, she was the Lead Facilitator or a cofacilitator for the creation of 23 departmental Strategic Business Plans and coordinated efforts to monitor, maintain, update and add programs to the Departments Strategic Business Plans as needed. In addition to her

role coordinating the City's strategic business planning efforts, Cheryl also assisted Department Managers and their Budget Analysts in establishing program and division codes for their performance budget.

Cheryl has facilitated strategic plans and delivered MFR Services in El Paso, TX, Las Cruces, NM, Gahanna, OH, Clackamas County, OR and Baldwin County, AL. Cheryl will serve as a back-up co-facilitator if needed.

Note: Cheryl's full resume is available upon request.

Darcie Perkins- Senior Consultant

Darcie Perkins is a Senior MR Consultant and is the founder of Decorate CB, and co-owner of Off the Wagon, two small businesses serving the needs of homeowners and event planners in Crested Butte, CO. Prior to joining Managing Results, LLC, Darcie worked as an entrepreneur starting and selling small businesses, each filling a unique niche in small communities. Additionally, she served as the Executive Director of Living Journeys, a cancer support nonprofit. In her time at Living Journeys, she spearheaded the organizations first a strategic planning initiative which resulted in 500% growth in revenue and a greater impact to clients with improved and increased services being offered. Her strengths bring talents together to create great teams that solve real-world problems and turn big-picture thinking into applicable action.

Darcie was trained by Marv Weidner as a Facilitator of Organizational Strategic Plans and Department Strategic Business Plans and has facilitated Strategic Plans and delivered MFR services for Gunnison County, CO, the Town of Mt. Crested Butte, CO, Clackamas County, OR and various not-for-profit organizations. Darcie will serve as a back-up co-facilitator if needed.

Note: Darcie's full resume is available upon request.

Scope of Services

MR proposes the development of a City Strategic Plan to be developed by the City Commission, City Manager and Departmental Leaders and informed by stakeholders including City Employees, Residents and Business Owners. The presence of a City Strategic Plan provides direction, and it also mitigates organizational anxiety that can occur when the Priorities are either vague or uncertain. Departments and even members of the private sector can move forward with a sense of confidence knowing what the City's leadership is focused on and wants to accomplish. Converting those Priorities to measurable Strategic Goals makes it possible to allocate resources (both personnel and financial), to accomplish what the City believes is most important to the people who live, work, and pay taxes in Birmingham.

Expected outcomes of a customer-focused and results-based City Strategic Plan

- ✓ Provides the opportunity for the City Commission to <u>set the direction</u> for strategic, operational, resource and policy decisions
- ✓ Communicates the Measurable Results the community can expect to experience as a consequence of City services and a <u>focusing of efforts</u>
- ✓ Provides strategic direction and priorities for City leadership
- ✓ Sets the stage for <u>implementation</u> by providing the 'North Star' to which Departments can align their Annual Work Plans, Budgets, etc
- ✓ Provides the basis for <u>reporting</u> and the Commission's long-term performance dashboard
- ✓ Helps the City of Birmingham tell its story of impact!

City Strategic Plan Process

MR recommends the following steps to develop a City Strategic Plan as well as an aligned Implementation Plan that will help ensure successful execution of the Strategic Plan and help move the City of Birmingham toward realizing its vision for the future.

> Project Plan & Management

MR will work with City Leadership and/or the City's Project Manager to:

- Confirm the City Strategic Plan process
- Create a detailed schedule of project events and milestones
- Finalize public Involvement strategy including details of the proposed Interviews, Focus Groups, Public Input Forums/Community Meetings, Online Survey/Questionnaire, etc.

Note: The number of Interviews, Focus Groups, and Community Meetings detailed on the following pages can be expanded OR contracted as desired by the City and will be finalized during the Project Planning phase.

Phase I - Setting Direction

Review Documents and Materials to Identify Issues and Trends that will Impact the Residents and the City Government

A senior MR Consultant will gather information and review materials and documents to gain a sense of the Issues that are important and a history of the accomplishments and values that have governed the City of Birmingham. Documents will include but are not limited to the Comprehensive Plan, Capital Facility Plan, financial projections, current and recent budgets, tables of organization, performance reports, City Commission actions, policies and statements, press and media articles, public surveys, employee surveys, demographic information, economic development plans and projections, land use plans, and other reports on topics such as education, health, environment, arts and culture, tourism, etc.

One-on-One Interviews with the City Commissioners, City Manager and Designated Elected and Appointed Officials

A senior MR Consultant will interview the City Commission, City Manager and designated Elected and Appointed Officials. These individual interviews will take place onsite, include an orientation/overview of the process and will illuminate and document the perspectives of Leadership, which will then guide the planning process. These one-on-one interviews will focus on three primary questions:

- 1. What are the most important Issues the residents of Birmingham and the City government will be facing over the next 2-5 years?
- 2. What results do you want to be able to say have been accomplished 2-5 years from now?
- 3. When you think about the future you want for the City of Birmingham, what are some one-word descriptions that characterize what that future looks like?

An MR consultant will compile the information from the interviews and identify the common Issues and Trends, desired results and visioning characteristics and/or qualities identified by the City Commissioners, City Manager and designated Elected and Appointed Officials.

Facilitated Focus Group Sessions and Business Roundtable

A senior MR Consultant will facilitate (2) Focus Group Sessions with City Department Directors and select Staff, and (1) Business Roundtable Focus Group for businesses and those entities participating in economic development, commerce and health to gather information, insight, and recommendations related to the City Strategic Plan. These facilitated focus group sessions will take place onsite, include an orientation/overview of the process and will focus on two primary questions:

- 1. What are the most important Issues the residents of Birmingham and the City government will be facing over the next 2-5 years?
- 2. When you think about the future you want for the City of Birmingham, what are some one-word descriptions that characterize what that future looks like?

An MR consultant will compile the information from the Focus Group Sessions and identify the common Issues and Trends and visioning characteristics and/or qualities identified by each group.

Public Input Forums/Community Meetings

Based on best practices, public involvement is best created through in-person conversations with the community, similar to Public Input Forums or Community Meetings. MR suggests the following steps in gaining the Community's input into the development of the City Strategic Plan and the City's Vision for the future:

3. (2) Community Meetings, facilitated by MR, will be held to provide an opportunity for residents to discuss the issues they will face over the next 2-5 years and beyond as well as the characteristics and/or unique qualities that characterize the future they want for Birmingham.

An MR consultant will compile the information from the Public Input Forums and identify the common Issues and Trends and visioning characteristics and/or qualities identified by each group.

Online Survey/Questionnaire

A senior MR Consultant will work with the City's Project Manager and/or Communications Director in drafting questions for a short online Survey/Questionnaire that will inform the creation of the City Strategic Plan. The City will host and market the online survey via its traditional and social media channels. A senior MR

Consultant will then analyze and compile the results (this is easily done when using tools like Constant Contact, SurveyMonkey, etc.) in preparation for the Strategic Planning Retreat with the City Commission, City Manager and Key Staff.

Phase II - Focusing Efforts

> Facilitated Strategic Planning Retreat

In a 2-day Strategic Planning Retreat, two of MR's most senior consultants will facilitate the City Commission, City Manager and Key Staff to develop the City Strategic Plan through the following steps:

- Orientation and overview of the planning process and desired results.
- MR will summarize the Issues and Trends identified in the Document Review, Interviews, Focus Group Sessions, Community Meetings and Online Survey that will have a major impact on the residents of Birmingham and the City government over the next 2-5 years. The Planning team will review and assess the internal and external environment.
- The Planning Team will identify 3-5 Strategic Priorities that will emerge from the Issues identified. These
 are broad categories of focus (similar to the City's 5 Primary Goals listed on page 27 of the 2022-23
 Recommended Budget) within which measurable Strategic Goals will be established.
- The Planning Team will identify Measurable, Customer-focused Strategic Goals and objectives for/within each Priority. The Strategic Goals and objectives are time specific, measurable, observable customer results.
- The Planning Team will develop a Mission Statement that speaks to the City's purpose, its customers and how the accomplishment of the City's Strategic Goals will impact the Birmingham community.
- The Planning Team will develop a Vision Statement that outlines where the City would like to be in 5 years (and beyond) and communicates both purpose and values.

MR facilitates the development of strategic plans in a way that is built on consensus, which means that no votes are taken. The Strategic Priorities provide ample room for individual Commissioner's desired results to be included, built on consensus of the City Commission.

Plan Documentation - Preparation of Draft Strategic Plan Document

Following the Strategic Planning Retreat, MR will compile the work product and deliver a draft City Strategic Plan document to the City Manager and/or the City's Project Manager. MR will review the draft City Strategic Plan with the City Manager and/or the City's Project Manager.

Phase III - Implementation Planning

Implementation Plan Work Sessions

A Strategic Plan is only as good as its execution. For this reason, MR recommends that the City of Birmingham develop an aligned Implementation Plan that will serve as a roadmap for achieving each Strategic Goal included in the Strategic Plan and will assist the City in telling its story in terms of impact and results. MR recommends that the City develop the Implementation Plan in the late summer or fall of 2022. This timeline will make it possible to align the Strategic Plan with the annual budget cycle and with those Strategies, Action Items and/or Milestones included in the Implementation Plan that will need to be resourced in order to move the Strategic Plan goals forward.

Three to four weeks after the conclusion of the Strategic Planning Retreat, two senior MR consultants will return for a multi-day facilitated work session with the department leaders and key staff from the City. The

purpose of these sessions is to foster a sense of cohesion around the direction provided by the City Strategic Plan by ensuring the strongest alignment between the Plan and the department or departments whose operations will directly influence its implementation. The following are the expected results:

- Develop Strategies, Action Items, Milestones, Performance Measures and identify Required Resources for each Strategic Goal included in the City Strategic Plan.
- Produce an Implementation Plan that includes all of the Strategies, Action Items, Milestones, Performance Measures and Required Resources for implementing the City Strategic Plan.

Prior to the work sessions, MR will work with City leadership and the City's Project Manager to identify the departments which will contribute to each of the Strategic Goals. In some cases, a Strategic Goal will require the focus of one operational department. In many cases, however, a Strategic Goal will require multidepartment efforts and collaboration to ensure success.

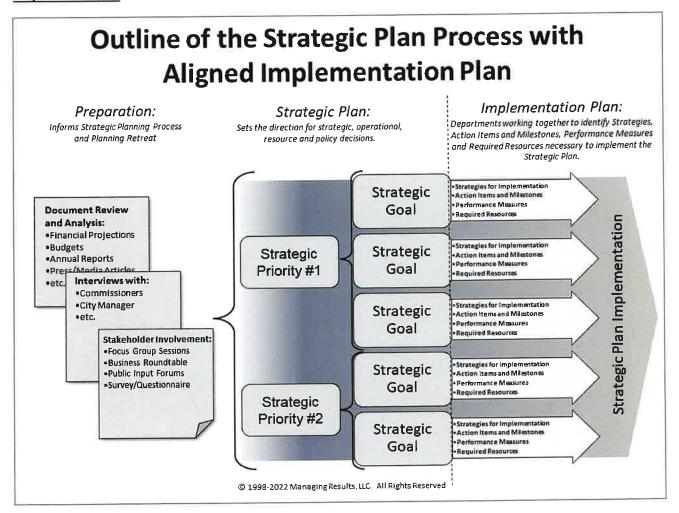
Plan Documentation - Preparation of Draft Implementation Plan for County Strategic Plan
The Strategies, Action Items, Milestones, Performance Measures and Required Resources for implementing
the City Strategic Plan will be recorded by MR consultants during the work sessions and are used to develop
the Implementation Planning document. MR will compile and deliver a draft Implementation Plan document
in Microsoft Word. MR will provide review and comment on the Implementation Plan document.

Note: The City of Birmingham is responsible for the creation of any publishable City Strategic Plan and accompanying Implementation Plan that contains information outside of the scope of this RFQ and/or creative visuals that require the expertise of a professional graphic designer.

Phase IV - Administering the Strategic Plan

<u>City Strategic Plan Implementation – Quarterly Status Updates for City Manager & City Commission</u>
The Strategic Plan MR will facilitate will have measurable, Strategic Goals the City can use to directly measure and report on its progress in implementing the Plan. The City Manager will be able to track progress on the Strategic Goals and report to the City Commission and the community so that it will be transparent to everyone the City's progress on achieving the Strategic Goals in the Plan.

Further, MR recommends that the City hold quarterly management meetings to review and evaluate progress on each of the Strategic Goals. This will be supported, and progress will be managed through the Implementation Plan and the strategies, action items, milestones and performance measures contained within the Implementation Plan. The quarterly meetings will help ensure the appropriate level of focus is being given to implementation of the Plan. The meetings are also a way to brief the City Manager, provide support to departments where needed and take corrective action where appropriate. As part of the process and specifically the Implementation Plan Work Sessions, MR will provide the City with recommendations for administering the plan over time including but not limited to how these periodic reviews can be structured, and will provide the City with a copy of its Implementation Plan Progress Report Template.



Note: The process flow chart above is a representation of the City Strategic Planning process that includes a detailed and aligned Implementation Plan.

Sample Project Timetable

The following schedule represents a typical timetable and the tasks for the completion of a City Strategic Plan as outlined in MR's proposal and in the RFQ. The actual timetable will be determined by the timing and finalization of a contract agreement and the schedules of City Leadership, Staff and MR.

Week of May 23rd, 2022

Contract Executed

Late May 2022

- 1 Senior MR Consultant works with City to confirm project details that will guide the creation, timing and deliverables of the City Strategic Plan
- 1 Senior MR Consultant begins reviewing materials, documents and data sets relevant to the City Strategic
 Plan

June or July 2022

- MR conducts one-on-one interviews with City Commission and City Manager
- Short Survey/Questionnaire is released and as is available for 30 days
- MR facilitates Focus Group Sessions with Department Directors and Select Staff
- MR facilitates any remaining Focus Group Sessions and Business Roundtable
- MR facilitates (2) Public Input Forums/Community Meetings

July 2022

Short Survey/Questionnaire results come in and are compiled and analyzed by MR

Early August 2022

- 2 Senior MR Consultants facilitate (2) consecutive Strategic Planning Sessions with the City Commission,
 City Manager and Select Staff
- MR compiles and delivers a draft City Strategic Plan

Late August 2022

- Senior MR Consultants facilitate up to (5) days of work sessions with department leaders to develop Strategies, Action Items, Milestones, Performance Measures and identify Required Resources for each Strategic Goal identified in the City Strategic Plan
- MR delivers a draft Implementation Plan for the City Strategic Plan.

October 2022 - February 2023

• In alignment with the City's annual budget calendar, begin conversations about any required resources necessary for the implementation of the City Strategic Plan. As Preliminary Budgets are completed and submitted by Departments, Budget modification requests that specifically relate to a Strategic Goal in the City Strategic Plan should reference that Strategic Goal.

References

In addition to the first (3) references, MR is also including Gunnison County, CO as one example of how MR Strategic Plans and the methodology conveyed to our City and County customers can be successfully and continuously used over many years as goals are completed and/or achieved, etc. *Note: Additional references are available upon request.*

I. Ashland, WI

601 Main Street West Ashland, WI 54806 Brant Kucera, City Administrator

bkucera@coawi.org (715) 682-7071

Project Description

Beginning in June 2021, the City of Ashland partnered with MR to develop a City Strategic Plan focused on delivering measurable and meaningful results for the community. The City's Strategic Plan project included a stakeholder engagement component (including interviews, focus groups and survey assistance). In late 2021, MR facilitated the Mayor, City Council and Department Leadership to develop a measurable, results-oriented City Strategic Plan. In addition, in January 2022, MR returned to Ashland to facilitate the Implementation Plan Work Sessions that resulted in an Implementation Plan/Roadmap for the City Strategic Plan.

II. Baldwin County, AL

322 Courthouse Square Bay Minette, Alabama 36507 Wayne Dyess, Former County Administrator

Currently Exec. Dir. of Infrastructure & Development, City of Foley, AL

Wdyess@cityoffoley.org

(251) 406-2130

Project Description

In 2006 and again in 2020, MR facilitated the County Commissioners and key staff of Baldwin County, AL (fastest growing County in the state) to develop a measurable and results-oriented County Strategic Plan. The County's Strategic Plan project included a stakeholder engagement component (including interviews, focus groups, survey assistance and Community Meetings) as well as a facilitated Strategic Planning Retreat and Implementation Plan Work Sessions.

III. Clackamas County, OR

2051 Kaen Road Oregon City, OR 97045 Gary Schmidt, County Administrator GSchmidt@co.clackamas.or.us

(503) 655-8581

Project Description

In 2014, 2017, late 2019 and again in late 2020 (following the November election), MR facilitated the County Commissioners of Clackamas County, OR to update their measurable and results-oriented County Strategic Plan. The County's Strategic Plan is the cornerstone of its performance management initiative 'Performance Clackamas' that also includes Department Strategic Business Plans, a Program Structured Performance Based Budget and Performance Reporting. The 2019 update to the County Strategic Plan included one-on-one interviews with elected and appointed officials as well as a facilitated Strategic Planning Retreat and Implementation Plan Work Sessions.

IV. Gunnison County, CO

200 East Virginia, Suite #104 Gunnison, CO 81230

Matthew Birnie, County Manager mbirnie@gunnisoncounty.org (970) 641-0248

Project Description

Gunnison County began their Strategic Planning with MR in 2007 and has continued with their Managing for Results performance management initiative since that time. As an example of how the process and plan continues to provide value after the initial engagement, the Gunnison County Commissioners, with MR assistance, have updated the County Strategic Plan seven times since 2007 (2009, 2011, 2013, 2015, 2017, 2019 and 2022) to ensure that issues on the horizon are considered and new priorities have customer-focused strategic goals attached to them so that success is defined and results are achievable. Gunnison has engaged MR to develop and update its Implementation Plan for its County Strategic Plan. In 2018, 2019 and again in 2020, Gunnison County was awarded the ICMA Certificate of Excellence in Performance Management for its commitment to data-driven government management.

Additional Data and Information

Outstanding Characteristics of the Organization

✓ <u>Strategic Plan Structure & Modified Consensus Decision-Making</u>
One measure of success in any strategic planning effort is the support it generates for successful implementation. Key to that is for all members of the City Commission to all fully support the Strategic Plan.

MR developed a decision-making process we call 'modified consensus'. As we develop the Plan, no votes are taken. Votes create winners and losers, which is not a good foundation for moving a Strategic Plan forward.

The Strategic Plan structure used by MR provides the way for all Commission members to support the Plan as it is developed and later as it is implemented. The Strategic Priorities are broad categories agreed to unanimously by the Commission. As each Strategic Priority is further developed by delineating Strategic Goals, it is easy to create the 'room' necessary for individual Commissioner interests to be expressed. We never need to take votes but instead our customers achieve consensus. Modified consensus means that everyone can support the decisions made, not that everyone equally agrees. Thus far in 23 years our customers have not had to take votes on what is included in their City or County Strategic Plan.

✓ Public Involvement – What are the issues?

Over the years we have watched cities and counties ask the wrong question. In one instance, an incoming Mayor inherited an extraordinary set of expectations, written in response to the outgoing Mayor's request for neighborhoods to provide their 'wish list' set of desired improvements. That amounted to \$5 Billion in unmet and unmanaged expectations and had everything to do with this incoming Mayor becoming a one-term Mayor. Knowing what is on everyone's wish list is not helpful when developing a Strategic Plan.

What is helpful is to ask community members what Issues they believe they will be dealing with over the next several years, typically 5 years or the planning horizon encompassed by the Strategic Plan. This information is extremely valuable to the City Commission as they develop the Strategic Plan. Often the Strategic Priorities express the most urgent Issues, e.g., public safety, infrastructure, environment, recreation, good governance or specific issues that are most important in a community at a given point in time.

The Strategic Goals developed in the Strategic Plan, if achieved, will address those issues. MR has developed dozens of city and county Strategic Plans structured around key issues and over 1,800 department Strategic Business Plans focused on key issues facing the department and its customers.

One further point, if a Strategic Plan is focused on the issues customers will be facing, that Plan will lean hard into the future and be customer-focused.

✓ Driving Innovation through a Focus on Results

In working with and observing public sector organizations over the last 23 years, we have watched and continue to watch organizational cultures evolve to become innovative...or not. If you give a team a task to do, they will do it. If you give them a customer experience or result to accomplish, they will have to figure out how to do deliver that customer experience or result. They will look at how they currently deliver services, evaluate what needs to change, and then make those changes (and in many cases innovate) to improve the customer experience. In other words, if an organization can get focused on customer results, innovation will become commonplace. MR's methodologies help our customer jurisdictions create a culture of innovation.

✓ Inclusive Process – You create the plan, not the consultants.

MR's customers develop the Strategic Plan, not MR. MR provides and facilitates the process and the City Commission, City Manager and key staff create the content. This aspect of planning comes up often, sometimes in RFPs and RFQs where a city or county is asking the consultant to write the Plan. We won't do that because the Plan is very specific to your community and only leaders of the community can, therefore, provide the content of the Plan. This may not be an issue for the City of Birmingham. The MR approach ensures that the Strategic Plan expresses what the community wants, not what the consultant thinks you want or, worse, thinks you should want in your Plan.

✓ Project Management and Coordination

MR prides itself on being customer-focused and will closely coordinate the Project and process with the City and City Leadership. This coordination will ensure the Project is managed according to the Contract, the City and MR are fully informed about progress being made in the Project, problems are being solved as they are anticipated or identified, roles are continuously clarified as needed, and the City and MR have a wide-open communications channel between them.

In person, telephone and/or video-conferencing communications and conversations will be essential components of project coordination with the City. There will be regular conversations between MR and the City Manager and the Assistant City Manager. If the City's experience is anything like other MR customers, an abundance of verbal communications will be the norm throughout the project.

Additionally, with each Invoice submitted to the City as part of the Project, MR provides a Contract Tracking Tool. The Contract Tracking Tool shows the specific invoice being submitted, along with details about the milestone(s) delivered, the amounts billed to date for each item in the Contract and the amount remaining in the Contract. In this way, the City and MR always know where we are in relation to the Contract, and any changes the City makes to the Contract are fully informed with all funds that have been paid and what remains. The Contract Tracking Tool helps avoid miscommunications because everyone involved in approving and paying invoices knows the up-to-date status of the Contract.

Looking Ahead: Next Steps to Consider When the Time is Right

MR has successfully helped some of America's best managed governments build fully integrated management systems so that strategic planning and using performance information to make decisions becomes 'how they do business' vs. just another exercise. The first step in that process, identified in this RFP, is the creation of a results-based City Strategic Plan as well as an aligned Implementation Plan that ensures successful execution of the City Strategic Plan.

Gunnison County, CO, which has been doing Managing for Results since 2008, began its effort by creating a County Strategic Plan and Implementation Plan. By creating a County Strategic Plan and Implementation Plan, the County was able to begin executing its plan immediately. In 2009, Gunnison County created Department Strategic Business Plans, which allowed them to manage for results for all operations (not just those areas that aligned with the goals in the current County Strategic Plan) and develop a Performance Based Budget.

The creation of Department Strategic Business Plans is the third step (following the City Strategic Plan and Implementation Plan) in building a performance management system where planning, performance measurement and budgeting are all one system and one process. This integrated approach maximizes the benefits of all three components — while at the same time making them one annual process, one annual, integrated calendar of events. Because the creation of Department Strategic Business Plans is essential to creating engagement within

operational departments, defining organizational structure around results and telling a department's story of impact on customers, many MR customers have chosen to develop Department Strategic Business Plans.

The development of a Performance Based Budget (PBB) is the fourth step. MR's PBB methodology creates a performance budget based on Department Strategic Business Plans. This reinforces the assets of both processes — to ensure that results identified in the Department Strategic Business Plans are resourced. So, there is a level of funding for a level of expected performance. This means that the budget is funding results rather than simply funding the organization.

Customer Jurisdiction Strategic Planning and Performance Management Websites

Below are three customer jurisdiction examples where they showcase their strategic planning and overall performance management initiatives developed with MR.

- Clackamas County, OR --- http://www.clackamas.us/performance/
- 2. Oklahoma City, OK --- https://www.okc.gov/departments/finance/performance-data
- 3. Gunnison County, CO --- https://www.gunnisoncounty.org/172/Strategic-Planning-and-Performance

Fee Proposal

Introduction

The following fee proposal is a mirror image of MR's strategic planning process outlined on pages 10-14. The budget reflects best practices and includes tasks for creating a customer-focused and results-based City Strategic Plan as well as an aligned Implementation Plan. MR looks forward to using this proposed budget as a beginning point in its conversations with the City of Birmingham.

Proposed Fee Structure by Task

Prices include all costs associated with completing each task.

I.	Setting Direction	\$
>	 Project Planning Includes working with City Leadership and/or the City's Project Manager to confirm the City Strategic Planning process and establish detailed schedule and timeline of events. Includes 1 days (8 hours) of working with City Leadership and/or the City's Project Manager, 1 consultant at a cost of \$2,200. 	\$2,200
>	Document Review Includes review of existing City materials and documents. • Includes 1 days (8 hours) of review, 1 consultant at a cost of \$2,200.	\$2,200
A	 Interviews with the City Commission, City Manager and Designated Elected and Appointed Officials Includes individual interviews with City Commission, City Manager and Designated Elected and Appointed Officials to address emerging issues facing the community and results most important to achieve over the next 2-5 years. Includes 2 days (16 hours) of interviews, 1 day (8 hours) of compiling the information, 1 consultant at a cost of \$6,600. Associated travel costs will be \$0 as the Interviews will be scheduled while onsite for the Focus Group Sessions and Public Input Forums/Community Meetings. Note: The number of one-on-one interviews can be expanded OR contracted as desired by the City and will be finalized during the Project Planning phase. 	\$6,600
>	 Facilitated Focus Group Sessions Includes (2) Focus Group Sessions with City Department Directors and Select Staff and (1) Business Roundtable Focus Group to gather information, insight, and recommendations related to the City Strategic Plan. Includes 1½ days (12 hours) of Focus Groups, 6 hours of compiling the information, 1 consultant at a cost of \$4,950. Note: The number of Focus Group Sessions (for employees or other stakeholder groups) can be expanded OR contracted as desired by the City and will be finalized during the Project Planning phase. 	\$4,950

 Public Involvement- Public Input Forums/Community Meetings Includes (2) Public Input Forums/Community Meetings to gather information and insight in preparation for the City Strategic Plan. Includes 2 days (16 hours) for preparation and the actual Public Input Forums and 1 day (8 hours) of compiling the information gathered, 1 consultant at a cost of \$6,600. The proposal assumes that travel for the Interviews, Focus Group Sessions and Public Input Forums will include 1 onsite visit that take place across one work week (5 days) for 1 consultant at a cost of \$2,750 or less. NOTE: MR will work with the City during project planning to determine if additional time is needed due to scheduling etc. Note: The number of Public Input Forums/Community Meetings can be expanded OR contracted as desired by the City and will be finalized during the Project Planning phase. 	\$9,350
 Online Survey/Questionnaire Includes working with the City's Project Manager and/or Communications Director to develop Online Survey questions. Also includes analysis of the results and incorporating the information from the survey into the Strategic Planning presentation to be delivered at the Facilitated Strategic Planning Retreat. Includes 2 days (16 hours) for survey development assistance, analysis, and compilation, 1 consultant at a cost of \$4,400. 	\$4,400.
Subtotal	\$29,700

II.	Focusing Efforts	\$
A	<u>Facilitated Strategic Planning Retreat</u> Includes Assessment of the Future Discussion and Review, Strategic Priorities, measurable Strategic Goals, Mission, and a Vision that communicates purpose and values.	\$14,750
	Includes 1 day of preparation (8 hours), 2 days for the onsite Strategic Planning Retreat, 2 consultants (32 hours) at a cost of \$11,000 with associated travel costs of \$3,750 or less.	
>	 Preparation of Draft Strategic Plan Document Includes compiling and delivery of draft City Strategic Plan Includes 1 day (8 hours) of compiling the information and work product from the Strategic Planning Retreat, 1 consultant at a cost of \$2,200 	\$2,200
Su	btotal	\$16,950

III.	Implementation Planning	\$
A	 Facilitated Implementation Plan Work Sessions Includes working with Department Leaders and Key Staff to ensure operational alignment and the creation of individual and cross-cutting Strategies, Action Items, Milestones and Performance Measures for each Strategic Goal in the City Strategic Plan. Prior to the work sessions, includes ½ day (4 hours) to help identify which Departments will contribute directly to the achievement of each Strategic Goal so they can be included in the appropriate Implementation Planning Work Session, 1 consultant at a cost of \$1,100. Includes 2 consultants over a 5-consultant day period* (80 hours) at a cost of \$22,000 with associated travel costs of \$4,987 or less. *The estimated budget for Implementation Plan Work Sessions is 5 days. If the time required is less than 5 days, only those days utilized will be invoiced. 	\$28,087
>	 Preparation of Draft Implementation Plan Document Includes compiling and delivery of draft Implementation Plan document. Includes 1½ days (12 hours) for compiling the information and work product from the Implementation Plan Work Sessions, 1 consultant at a cost of \$3,300 	\$3,300
Su	btotal	\$31,387

IV.	Administering the Strategic Plan	\$
A	City Strategic Plan Implementation Includes recommendations for administering the City Strategic Plan including but not limited to how quarterly Implementation Planning Progress Report meetings can be structured as well as a copy and instructions for how to utilize MR's Implementation Plan Progress Report Template.	No Cost
>	<u>Presentation of City Strategic Plan to the Commission</u> Following the completion of the City Strategic Plan and accompanying Implementation Plan, MR alongside the City Leadership Team, will present the final Strategic Plan to the Commission.	\$6,150
	• 1 day (8 hours) offsite to develop PowerPoint Presentation and work with City Leadership on the detail of the Presentation and 1 day (8 hours) onsite for the presentation of the City Strategic Plan, 1 consultant at a cost of \$4,400 with associated travel costs of \$1,750 or less.	
Sui	btotal	\$6,150

Summary Pricing Table	\$
TOTAL LABOR	\$70,950
TOTAL ESTIMATED TRAVEL	\$13,237
TOTAL PRICE	<u>\$84,187</u>

Note: Travel costs are estimated using present market prices and the per diem lodging and food rates as set by the U.S. General Services Administration. Only actual travel costs will be submitted for reimbursement, and MR will work where possible to realize travel savings.

Examples of Previous Work

On the following pages are three work samples (jurisdiction-wide Strategic Plans) that were completed by MR that are similar to the work being requested by the City of Birmingham. In reviewing the Strategic Plans, it is important to note that a jurisdiction Strategic Plan is both a planning document as well as a communication tool. As a result, it is important that your City Strategic Plan be concise and to the point so that residents and other members of the community are willing to take the time to look at the plan and see how the priorities and goals included in the plan will impact their lives.

Note: Due to the length of Implementation Plans, MR is including one example from Baldwin County in 2020. Additional examples of Strategic Plans and Implementation Plans can be provided upon request.

- <u>Baldwin County</u>, <u>AL</u> ---2020 County Strategic Plan (Public Document) and the aligned Implementation Plan (Internal Working Document used by Management and Staff to manage progress toward the achievement of the County's Strategic Goals).
- Savannah, GA --- 2017 City Strategic Plan
- Clackamas County, OR --- 2020 County Strategic Plan Update





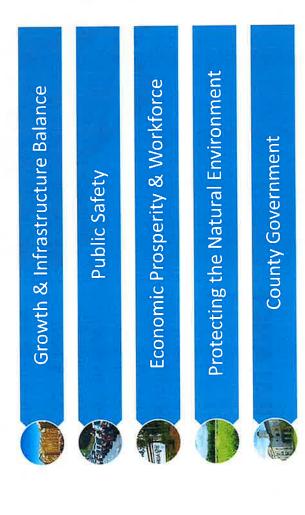
Vision:

Baldwin County, a place where you'll find opportunity, recreation and culture now and for generations to come.

Mission:

to people who live, work and visit Baldwin County so they can enjoy a safe and thriving community The mission of the Baldwin County Commission is to provide customer-focused services and experience our unique heritage and natural resources.

Strategic Priorities



GROWTH & INFRASTRUCTURE BALANCE

Growth in population will continue because of the high quality of life available here in Baldwin County. To maintain our high quality of life, however, it is essential that transportation and economic development infrastructure, such as high-speed internet, keep pace with the growth in the number of people living and visiting here. This well-planned balance will continue to be the focus of the County Commission and will be accomplished through the following results:

- By 2022, residents will experience a well-planned set of new and improved roads for local travel that will alleviate traffic congestion on arterials.
- By 2025-2027, residents and visitors will experience reduced congestion with the completion of the Baldwin Beach Express #2 (BBE2).
- development process, and creates and fosters a coordinated vision and goals with cities while respecting the By December 31, 2022, property owners, municipalities and schools will experience a Comprehensive Land Use Plan that ensures consistency between the County and Municipalities, encourages predictability in the citizen-driven zoning process.
- By 2025, the community will experience increased water access with parking throughout the County, as evidenced by:
- Additional water access points with parking
 - Upgrades to existing water access points



Public Safety

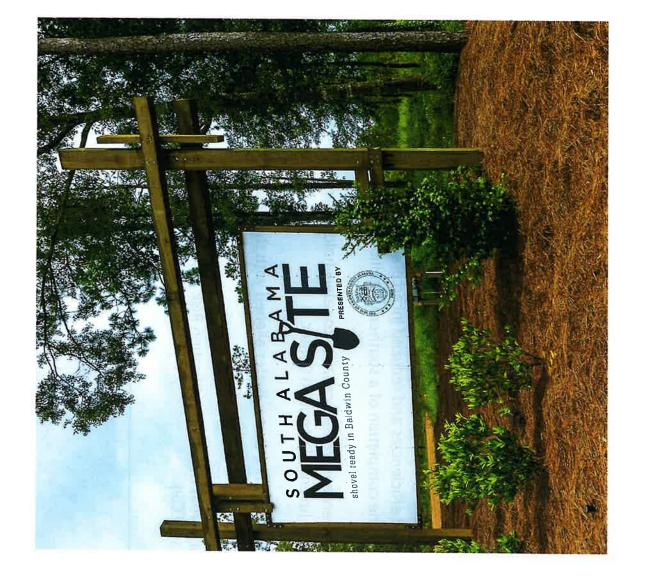
The safety and security of our residents, businesses and visitors is paramount to the quality of life in Baldwin County. Providing citizens a sense of security in our homes, neighborhoods, parks, roadways, and as we go about our daily business is a top priority of the County Commission.

To further enhance public safety, the Commission intends to expand jail capacity, create efficiencies for processing minor offenses, enhance the safety of juvenile offenders when in custody and bolster the Coroner's ability to compassionately serve the public in a timely fashion. The following results will be the focus of the County over the next 2-5 years:

- By 2025-2026, Baldwin County will experience improved public safety through the building and completion of the Baldwin County Sheriff's Office Tower B.
- those committing minor offenses as the result of the completion of a southern satellite booking center. By 2025, Baldwin County will experience increased efficiencies and reduced incarceration times for
- By December 31, 2021, Baldwin County will experience increased capacity to safely hold juvenile offenders with the expansion of 10-20 beds in the Juvenile Detention Center.
- By 2025, Baldwin County will experience a Coroner's Office that is better aligned with the County's functional population and better able to handle a mass casualty event.
- By 2022, Baldwin County will have completed a Threat Hazard Identification Risk Assessment (THIRA) and a corresponding Emergency Operations Plan (EOP)

Economic Prosperity & Workforce

The County is committed to building a vibrant prosperous local economy. While tourism will continue to be an important aspect of our economy, the County also seeks to bring into the South Alabama Mega Site businesses in other industries like logistics, aerospace, automotive, healthcare and distribution offering wages which sustain families and communities. Likewise, the County is committed to building a workforce to support those same industries. To strengthen our economic development initiatives, the County will focus on the following results:



- By 2025, Baldwin County will experience (1) or more sizable industries locating operations at the South Alabama Mega Site.
- By 2026, Baldwin County will experience an adequately trained workforce in the areas of Logistics and Transportation, Aerospace, Automotive, Healthcare and Distribution.
- By 2025, Baldwin County residents and visitors will experience the full development and marketing of Live Oak Landing and Bicentennial Park.

Protecting the Natural Environment

Protecting our precious natural environment is the responsibility of everyone - residents, businesses, government, and visitors. Our future and that of our children depends on us doing this important work. The County will take a leadership role to protect our natural environment by achieving the following results:



- By 2022, the community will experience a reduction in runoff and flooding through the implementation of a regional retention system for stormwater.
- By 2021, the County in partnership with the District Attorney's Office, will participate in environmental investigations focused on the reduction of environmental crimes.
- through regular testing and reporting of water quality and the ongoing development of partnerships with By 2021, the community will experience increased transparency and accountability for watershed quality citizens and groups interested in the environment.



County Government

Tax paying residents and businesses will experience an accountable and transparent County government focused on responsive customer service as evidenced by the following results:

- Beginning in October 2021, Baldwin County residents will experience increased transparency and accountability with the issuance of an Annual Performance Report.
- By November 2021, Baldwin County will experience a customer-focused and supportive County Organization culture through the implementation of an employee recognition program.
- By December 2021, community and citizen inquiries will receive a response or return phone call within 24-72 hours.
- continuation of regional partnerships with municipalities, adjoining Counties, Boards of Education, By 2022, the community will experience enhanced service delivery through the initiation and

COUNTY, ALABAMA

EST. 1809



Implementation Plan for the Baldwin County Strategic Plan

Draft: August 10, 2020

Strategic Priority: Growth and Infrastructure Balance



Date: July 27, 2020

Overall Status: On Track

Strategic Goal: Consistent High-Speed Internet

1.1 By 2025, all residents and businesses of Baldwin County will have the ability to access consistent high-speed internet.

Strategic Goal Lead	Brian Peacock- CIS
Strategic Goal Team	Kristy Davis – Budget Office Wayne Dyess- Administration Vince Jackson- Planning Tanner Jones- Economic Development Alliance Sherry-Lea Bloodworth Botop- Administration
Strategies	 ✓ Understanding of the Current Landscape (Industry Players, Availability, Demand based upon Geography) ✓ Define consistent high-speed Internet ✓ Contact Municipalities in Baldwin County & Utility Providers ✓ Align consistent high-speed Internet Access in the development of the Comprehensive Plan ✓ Develop and Implement Strategy to Engager Private Sector OR Deliver Direct Services to Customers
Action Items	Understanding of the Current Landscape (Industry Players, Availability, Demand based upon Geography) By 8/1/2021, understand the industry players (providers) and the geographic service areas, demand, limitations, etc. Define consistent high-speed Internet By 1/1/2021, defined the tiered levels of consistent high-speed internet across the following categories: Home Business Other Etc. Contact Municipalities in Baldwin County & Utility Providers By 8/1/2021, engage with all County municipalities for the following: So they understand the County goal of "consistent high-speed internet" So they can share any capabilities, ideas and strategies used in their jurisdiction re high-speed internet access By 8/1/2021, engage with infrastructure providers for connectivity purposes.

	Align consistent high-speed Internet Access in the development of the Comprehensive Plan By 12/31/2021, complete the Comprehensive Plan that includes a tiered growth system to aid in the growth of high-speed internet and a better ROI proposition for developers and internet access providers.
	Develop and Implement Strategy to Engage Private Sector OR Deliver Direct Services to Customers By 1/1/2023 target service availability by tier and develop plan to engage public sector, private sector or both.
Required Resources	To be determined as implementation progresses
Performance Measures	 % Baldwin County residents that have access to high speed internet Note: begin by looking at School Board Info % Baldwin County businesses that have access to high speed internet \$ Grants available for high speed internet \$ Grants received for high speed internet



Date: July 27, 2020

Overall Status: On Track

Strategic Goal: Improved Roads for Local Travel

1.2 By 2022, residents will experience a well-planned set of new and improved roads for local travel that will alleviate traffic congestion on arterials.

Strategic Goal Lead	Joey Nunnally- Highway Department
Strategic Goal Team	Ron Cink- Budget Office Frank Lundy- Highway Department Celena Boykin- Planning
Strategies	 ✓ Planning ✓ Relationships ✓ Safety ✓ Financing
Action Items	 ✓ Planning By 9/1/2020, identify what roads look like now in terms of connectivity, what is working and where there are opportunities for improvement. By 9/30/2020, create 'Heat Map' of sources of local traffic, i.e. subdivisions, businesses, schools, annexations, etc. By 9/30/2020, create layered road map showing high congestion areas and points. By 9/1/2021, create 'Detour Map and Geo Fencing', including a communication strategy. Phase 1 Implementation – FY 21 Four Connectivity Projects & what will be accomplished in FY21 (To be filled in by Highway Dept) 1. 2. 3. 4. Two Safety Projects (To be filled in by Highway Dept) 1. 2. Phase II Implementation FY 22 By 6/1/2021, Phase II Begins Priority List for Short, Medium and Long Term Projects Budget Proposal for FY 22

	 ✓ Relationships By 1/1/2021, share 'Heat Map' with municipalities, ESMPO and other key groups. Note: Goal is to develop partnerships by identifying shared needs and problem areas. ONGOING, Local Road Safety Plan is a relationship building strategy and opportunity. Continue participating in professional associations, which can help the County influence state and federal policies, i.e. ACCA, ACEA, Develop and maintain strong professional relationships with key agencies and boards, i.e. AL Department of Transportation's Strategic Transportation Investment Plan, AL Department of Natural Resources, US Department of Agriculture, Local School Boards, etc.
	 By 10/1/2020, develop Local Road Safety Plan BCC adoption ONGOING, the following are ongoing action items: Accident analysis Implement targeted changes Use the analysis to inform priorities re congestion
	 ✓ Financing ○ By 6/30/2021, develop targeted financing strategies for specific types of projects. Examples include: □ Debt Financing with established parameters. ■ Recurring funding sources for maintenance and resurfacing, e.g. tax revenues, Rebuild revenues. ■ Grants for new and one-time projects, leverage local funds. ■ Toll for BBEII ■ Other local jurisdiction funding participation
Required Resources	To be determined as implementation progresses
Performance Measures	% Change in the number and severity of accidents for specific safety projects Ratio – Predicted ADT: Actual ADT per project (ADT – Average Daily Traveler) # ADT on new or improved routes per project (assumption is that increases in ADT in a project is equal to the reduction of ADT on arterials)



Date: July 27, 2020

Overall Status: On Track

Strategic Goal: Baldwin Beach Express #2

1.3 By 2025-2027, residents and visitors will experience reduced congestion with the completion of the Baldwin Beach Express #2 (BBE2).

Strategic Goal Lead	Joey Nunnally- Highway Department
Strategic Goal Team	Ron Cink- Budget Office Frank Lundy- Highway Department
Strategies	✓ Public Education and Engagement
Action Items	 ✓ Public Education and Engagement Until 11/3/2020, provide presentations to Community Groups Until 11/3/2020, cooperate with local business owners and groups to provide public education re the project. Until 11/3/2020, cooperate with Road Builders Association, Utility Companies and other groups with a specific interested in the economic benefits of the project to encourage them to help provide public education re the project.
Required Resources	To be determined as implementation progresses
Performance Measures	To be determined as implementation progresses



Date: July 27, 2020

Overall Status: On Track

Strategic Goal: Comprehensive Land Use Plan

1.4 By December 31, 2022, property owners, municipalities and schools will experience a Comprehensive Land Use Plan that ensures consistency between the County and Municipalities, encourages predictability in the development process, and creates and fosters a coordinated vision and goals with cities while respecting the citizen-driven zoning process.

Strategic Goal Lead	Vince Jackson- Planning
Strategic Goal Team	Wayne Dyess- Administation Joe Ryan- Planning Sherry-Lea Bloodworth Botop- Administration
Strategies	 ✓ Award Comprehensive Plan RFP ✓ Community Engagement/Data Gathering ✓ Plan Development (Sector Planned Approach in Zoned Areas) ✓ Formally Adopt Comprehensive Plan ✓ Begin Implementation
Action Items	 ✓ Award Comprehensive Plan RFP • By 10/1/2020, renegotiate and Award RFP to vendor. ○ Renegotiate Community Engagement and Data Gathering details given the uncertainty around Covid-19 ○ Emphasis on Sector Planned Approach NOTES: ○ Has to be mainly virtual approach ○ Visual preference surveys, virtual town halls. ○ Utilize online meeting platform and/or surveys
	 ✓ Community Engagement/Data Gathering By 2/1/2021, community engagement and data gathering phase completed NOTES: ○ Community/Residents ○ Planning Commissions ○ Developers ○ School Boards ○ Civic Organizations ○ Homebuilders/Realtor
	 Plan Development (Sector Planned Approach in Zoned Areas) By 8/1/2021, complete Comprehensive Plan

	NOTES: O Components include Land Use, Transportation, Environmental, Parks, etc.
	 Formally Adopt Comprehensive Plan By 12/31/2021, formally adopt the Comprehensive Plan
	NOTES: O Public Hearings to Planning Commission and County Commission
	✓ Begin Implementation• 2022
Required Resources	Resources were allocated for Comprehensive Land Use plan as part of the FY19-20 budget
Performance Measures	% of recommendations to the Planning Commission that are approved



Date: July 28, 2020

Overall Status: On Track

Strategic Goal: Increased Water Access

1.5 By 2025, the community will experience increased water access with parking throughout the County, as evidenced by:

- a) (3) additional water access points with parking
- b) Upgrades to existing water access points

Strategic Goal Lead	Madison Steele- Parks
Strategic Goal Team	Wayne Dyess- Administration Vince Jackson- Planning Joey Nunnally- Highway Department Sherry-Lea Bloodworth Botop- Administration
Strategies	 ✓ Steering Committee ✓ (3) Additional water access points with sufficient parking Property Location Identify and Secure Funding (Land) Identify and Secure Funding (Design, Permitting and Build) Design, Permit and Build ✓ Upgrades to existing water access points Identify existing Water Access Points/Parks that need upgrades (Parks Assessment) Identify Individual Needs Prioritize needs based upon public safety and strategic direction of Parks Facilities and Services
Action Items	 ✓ Steering Committee By 12/31/2020, finalize cross-departmental steering committee to begin working on County Strategic Goal 1.5 ✓ (3) Additional water access points with sufficient parking Property Location COMPLETE- 1st Water Access Point with boat launch identified (ICW) By 12/31/2021, 2nd and 3rd Water Access Points with boat launch will be identified NOTES: Consider Parks, Greenways, etc. where possible in the identification of locations. By 12/31/2023, in conjunction with the identification and upgrades of water access points, develop overall strategy for Parks Services and development of Parks, trails, water access in Baldwin County (Parks Master Plan that includes future properties,

	 Identify and Secure Funding (Land) COMPLETE- 1st Water Access Point with Boat Launch is purchased (ICW) By 12/1/2020, 2nd Water Access Point with Boat Launch is purchased By 12/1/2021, 3rd Water Access Point with Board Launch is purchased Secure Funding (Design, Permitting and Build) By 10/1/2020, 1st Water Access Point (design, permitting and
	 build) funding secured (ICW) By 10/1/2021, 2nd Water Access Point (design, permitting and build) funding secured) By 10/1/2022, 2nd Water Access Point (design, permitting and build) funding secured)
	 Design, Permit and Build By 5/1/2022, 1st Water Access Point with parking complete By 5/1/2023, 2nd Water Access Point with parking complete By 5/1/2025, 3rd Water Access Point with parking complete
	 ✓ Upgrades to existing water access points Identify existing Water Access Points/Parks that need upgrades (Parks Assessment) ○ By 10/1/2021, complete Parks Facilities Assessment (focused on existing water access points and Parks Facilities)
	 Identify Individual Needs By 10/1/2023, complete individual needs assessment based upon future needs of water access point and Parks Facilities
	 Prioritize needs based upon public safety and strategic direction of Parks Facilities and Services By 10/1/2023, prioritize and begin process of seeking funding resources for targeted upgrades as part of the annual budget process (FY2022-23)
Required Resources	Funding for purchase 2 nd and 3 rd Water Access Points Funding for Design, Permitting and Build of 1 st , 2 nd and 3 rd Water Access Points
Performance Measures	To be determined as implementation progresses

Strategic Priority: Public Safety



Date: July 28, 2020

Overall Status: On Track

Strategic Goal: Completion of Jail Tower B

2.1 By 2025-2026, Baldwin County will experience improved public safety through the building and completion of the Baldwin County Sheriff's Office Tower B.

Strategic Goal Lead	Ron Cink- Budget Office
Strategic doar Lead	Non Clirk- Budget Office
Strategic Goal Team	Sheriff Huey Mack- Sheriff's Office Anthony Lowery- Sheriff's Office Wanda Gautney- Purchasing
Strategies	 ✓ Funding ✓ Construction ✓ Public Engagement and Education Strategy ✓ Staffing
Action Items	 ✓ Funding Public Building Authority County takes draws \$38M Projected cost per Architectural Design ✓ Construction On 9/30/2020, Approve Purchase Bay Minette Municipal Building By October 2020, Go to Bid for single contractor By Fall 2020, negotiate Right of Way for Docket Building (ALDOT) By the Fall 2020, Assess and negotiate re power lines (Alabama Power) From 1/1/2021 – 7/1/2021, renovate Municipal Building to become BCSO Administration Building By 9/30/2021, conduct site Preparation and demolition of 310 Hand St By October 2021, Water Tower Demolition By November 2021, Docket Building Demolition Prior to 1/1/2022, which is the Construction Start Date, Bay Minette 4th Street Quit Claim Deed Construction of Tower B and Docket Building By January 2022, Construction Start Date By October 2025, Construction Completion, Tower B and Docket Building Operational ✓ Public Engagement and Education From September – October 2020, conduct Stakeholder Meetings Bay Minette area - i.e. police, fire, ems, housing authority, utilities, chamber of commerce, schools, economic development, etc. In the Fall 2020 (likely timeframe), participate in Bay Minette Municipal public meeting/hearing

	 From the Fall 2020 – Fall 2025, conduct Public Education Media Campaign
	 ✓ Staffing ○ By 10/1/2020, Staffing Plan Developed for Jail Tower B ■ ALDOT re Travel and Traffic ■ Shared with County ○ In 2022, hiring begins ○ From 2022-2025, hiring continues ○ By October 2025, Tower and Docket facility staffed (50-80) to meet demand (200-250 Inmates)
Required Resources	To be determined as implementation progresses
Performance Measures	To be determined as implementation progresses



Date: July 28, 2020

Overall Status: On Track

Strategic Goal: Southern Satellite Booking Center

2.2 By 2025, Baldwin County will experience increased efficiencies and reduced incarceration times for those committing minor offenses as the result of the completion of a southern satellite booking center.

Strategic Goal Lead	Sheriff Huey Mack- Sheriff's Office
Strategic Goal Team	Bob Wilters- District Attorney's Office Teresa Heinz- District Attorney's Office Ron Cink- Budget Office
Strategies	✓ Planning Strategy
Action Items	 ✓ Planning Strategy ○ By 10/1/2020, determine the appropriate and optimal legal status of the center. Note: DA's Office will research this
	 By 1/1/2021, develop a Design Document describing the purpose and requirements of the Center, including program functions (e.g. work release, juvenile holding, booking, brief incarcerations for minor offenses, etc.), capacity needed by function, legal requirements (male/female separation, etc), and initial staffing requirements. Design Document also indicates the expected future demand for services.
	 By 2/1/2021, develop Space/Facility Plan to describe the space requirements needed to accommodate the purposes and functions described in the Design Document. May included architectural designs.
	 By 7/1/2022, develop funding strategies as part of the run up to the 2022 Budget.
Required Resources	To be determined as implementation progresses
Performance Measures	To be determined as implementation progresses



Date: July 28, 2020

Overall Status: On Track

Strategic Goal: Expand Capacity of Juvenile Detention Center

2.3 By December 31, 2021, Baldwin County will experience increased capacity to safely hold juvenile offenders with the expansion of 10-20 beds in the Juvenile Detention Center.

Strategic Goal Lead	Ron Ballard- Juvenile
Strategic Goal Team	Cian Harrison- Finance Junius Long- Building Maintenance Wayne Dyess- Administration
Strategies	Critical Path Method ✓ Required Resources ✓ Design and Build ✓ Operational Facility
	Alternate Strategies ✓ Cost/Benefit Analysis
Action Items	 ✓ Critical Path Method Required Resources By 10/1/2020, secure/not secure funding (\$550,000 estimate for architect and building) via the FY20-21 budget process. By 4/15/2021, if needed, secure additional funds for architectural adjustments, supplies, etc. By 10/2/2021, secure additional human resources (FTEs) to staff JDC expansion (estimated 7 FTEs or \$280,000) Note: Total estimated investment of \$1 Million Design and Build By 2/1/2021, architectural design/drawings complete By 4/1/2021, release RFP and award bid to vendor/contractor. By 12/31/2021, complete construction of the 10-20 expansion of JDC. Operational Facility By 4/1/2022, expanded facility becomes functional. Alternate Strategies Cost/Benefit Analysis By 6/30/2021, conduct cost/benefit analysis re: various business models thinking about # beds, # County Contracts and costs, \$ received via contracts, etc. By 12/31/2021, the County will have to make a decision about an

Required Resources	Estimated \$550,000 as part of FY20-21 budget process by 10/1/2020
Performance Measures	% time capacity is at 75% or greater % youth held at JDC that reoffend/return within 1 year.



Date: July 30, 2020

Overall Status: On Track

Strategic Goal: Coroner's Office

2.4 By 2025, Baldwin County will experience a Coroner's Office that is better aligned with the County's functional population and handle a mass casualty event.

Strategic Goal Lead	Brian Pierce- Coroner's Office
Strategic Goal Team	Troy Dyess- Coroner's Office Anthony Lowery- Sheriff's Office Cian Harrison- Finance
Strategies	 ✓ Current Situation ✓ Short-Term/In Progress Strategies ✓ Facility Strategies – Smart Growth Strategy ✓ Revenue Opportunities ✓ Ongoing
Action Items	 ✓ Current Situation Ok for now, but have to plan for future upgrade, etc. to the facility (6) Employees 1 Elected Coroner 3 Part-Time Contractors 2 Admin Assistants ✓ Short-Term/In Progress Strategies In Process- Accreditation

part of the Annual Budget process

 Ongoing funding requests as issues arise. ex: COVID 19 testing equipment, etc.

Notes: Increased expectations for service by community and criminal justice partners with a corresponding decrease in forensic science services provided by the State of Alabama.

- Impacts public safety and criminal justice partners and their ability to effectively do their jobs and deliver justice
- Example: Delayed testing or inability to test impacts ongoing cases at BCSO and ability to prosecute at DA's Office

√ Facility Strategies – Smart Growth Strategy

- Decision point to <u>expand</u> or <u>relocate</u>. Currently using \$60,000 to improve the current facility as much as possible.
- By 7/1/2021, research a develop tiered proposal that outlines Coroner facility that includes the following:
 - Secure lobby/reception area
 - Secure viewing area for families to view and/or identify loved ones
 - Business Office Area where business is conducted (ex: conference room, adequate secure storage, etc.)
 - Adequate and Safe Refrigeration- Permanent and/or temporary options
 - Lab for body examinations/testing
 - Storage for indigent cremations
 - Plan has to take into consideration current and future demand (future Trauma Center in Baldwin or Pensacola no longer accepting our cases)

✓ Revenue Opportunities

- Allow Organ Donor recovery in facility --- the next step is possible facility use agreement
- Administrative Fee for time it takes to research and generate Cremation Certificates

✓ Ongoing

- Explore Grant Funding (have to be accredited to get many Grants)
 - Personal Protection Equipment
 - Bio Supplies
 - Etc.
- Continued talks regarding legislation for amending salary requirements
- Explore Call Center options where calls are dispatched vs getting numerous calls from different parties for the same incident.

Required Resources

RMS Software System as part of FY20-21 Budget Process Cost to Expand or Relocate Coroner Facility

Performance Measures	% days facility is at 80% capacity or above % calls for investigation that receive an on-scene response in 1 hour or less % calls for transport that are on the scene in 1 hour or less
	# cases investigated # case investigations requested
	Note: Other performance can be added as desired to tell the story of this goal

b



Date: July 30, 2020

Overall Status: On Track

Strategic Goal: Emergency Operations Planning

2.5 By 2022, Baldwin County will have completed a Threat Hazard Identification Risk Assessment (THIRA) and a corresponding Emergency Operations Plan (EOP).

Strategic Goal Lead	Zach Hood- EMA
Strategic Goal Team	Jenni Guerry- EMA Wanda Gautney- Purchasing
Strategies	 ✓ Realigning Staff Strategy ✓ Securing Consultant ✓ Complete THIRA ✓ Complete Emergency Operations Plan ✓ Strengthening Partnerships with Municipal Emergency Management and Building their Internal Capacity Strategy ✓ Training and exercises with Municipalities Informed by the THIRA Strategy ✓ County Readiness and Continuity Strategy ✓ Communicate with State of Alabama Strategy ✓ Public Education Strategy
Action Items	 ✓ Realigning Staff By 10/1/2020, Organizational Structure aligned to Incident Command By 10/1/2020, Align Job Titles, Job Descriptions, 1 Job Classifications, Span of Control ✓ Securing Consultant Beginning in October 2020: Develop RFP Review Proposals and Select Consultant
	 ■ Write Contract ○ By 4/1/2021, Approve Consultant, Cost, and Funding Strategy ✓ Complete THIRA ○ By 8/1/2021, complete THIRA
	 ✓ Complete Emergency Operations Plan (EOP) ○ By 2/1/2022, complete EOP
	 ✓ Strengthening Partnerships with Municipal Emergency Management and Building their Internal Capacity ○ By February – June 2022, create a Program to accomplish the following: ■ Regular Meetings

	■ Discuss Issues
	 ✓ Training and exercises with Municipalities Informed by the THIRA ○ ONGOING training and exercises with Municipalities Informed by the THIRA Strategy
	 ✓ County Readiness and Continuity THIRA will identify our gaps EOP will address Continuity of Operations as an Annex to the document Beginning in September 2020, Annual Training for BCC, Department Heads and Senior Staff (PARTICIPATION REQUIRED) BCC Chair Orientation within 60 days of appointment By July 1, 2022, County Department Continuity of Operations Plans
	(COOP) completed (REQUIRED) ✓ Communicate with State of Alabama o In the Fall of 2020, continue to engage State executive EMA staff o In the Fall of 2020, collaborate to bring more State training resources o In the Fall of 2020, educate State EMA staff on Baldwin County's schedule for trigger points o In the Fall of 2020, create 'sync matrix' between Baldwin and State trigger points
	 ✓ Public Education Strategy is ONGOING: Tie messages to THIRA and EOP Tie to strengthening of Municipal Emergency Management Consult with local EM partners Continue providing 5-year training calendar Communicate content to State EMA Create funding strategy via Outreach item in budget Imbed in County Communications Plan Note: Baldwin EMA staff will develop content
Required Resources	To be determined as implementation progresses
Performance Measures	To be determined as implementation progresses

Strategic Priority: Economic Prosperity & Workforce



Date: July 29, 2020

Overall Status: On Track

Strategic Goal: Industry Locating Operations at the Mega Site

3.1 By 2025, Baldwin County will experience (1) or more sizable industries locating operations at the South Alabama Mega Site.

Strategic Goal Lead	Lee Lawson- Economic Development Alliance
Strategic Goal Team	Joey Nunnally- Highway Department Vince Jackson- Planning Wayne Dyess- Administration
Strategies	 ✓ Continue to partner with and support Baldwin County Schools and Coastal Community College on Workforce Development initiatives and training facilities ✓ Strategic Identification of residential and retail development opportunities in the Bay Minette area ✓ Public education initiative with Bay Minette residents
Action Items	To be determined as implementation progresses
Required Resources	To be determined as implementation progresses
Performance Measures	To be determined as implementation progresses



Date: July 29, 2020

Overall Status: On Track

Strategic Goal: Workforce Training

3.2 By 2026, Baldwin County will experience an adequately trained workforce in the areas of Transportation, Aerospace, Automotive, Healthcare and Distribution.

Strategic Goal Lead	Tanner Jones- EDA
Strategic Goal Team	Josh Duplantis- Coastal Alabama Sherry-Lea Bloodworth Botop- Administration
Strategies	 KEY: Having a mechanism to develop a career pathway. ✓ Economic Development Alliance (EDA) ✓ Baldwin County Schools ✓ Coastal Alabama
Action Items	KEY: Having a mechanism to develop a career pathway. ✓ Economic Development Alliance (EDA) ○ By 2025, (1) or more sizable industries locating operations at the South Alabama Mega Site. Note: Flow of Information from EDA 1. EDA has Company prospect 2. EDA communicates desired skills, numbers, etc. to Coastal Alabama 3. Coastal Alabama looks at occupations/job codes to see if they can start up a pathway to employment 4. Coastal develops schematic for how job pipeline would work ○ Partnerships exist with the following: ■ Coastal Alabama ■ Baldwin County School System ■ SAWDC – State Workforce Development (Mobile, AL) ■ (5) local Chambers of Commerce – they feed information into EDA, Coastal and Schools ✓ Baldwin County Schools ○ By 20XX, Baldwin County Career Tech High School will be completed. ✓ Coastal Alabama ○ By 12/31/2020, One Stop Shop for Technical Training, Adult Learning, ESL, Youth Program and onsite Career Center in Foley, AL. Note: Workforce Training is occurring and where there is an opportunity and availability, many are participating in an apprenticeship program

	The first company that locates at the MEGASITE will shape workforce training approach.
Required Resources	To be determined as implementation progresses
Performance Measures	Recommendation to at least measure where possible the following: Note: these were discussed in the work sessions but were not confirmed as we 1 of 2 attendees had to leave early. % individuals trained who are successfully placed % individuals trained who successfully placed
	% individuals trained who successfully complete the training # training programs available # individuals trained # individuals who request to be trained



Date: July 29, 2020

Overall Status: On Track

Strategic Goal: Live Oak Landing and Bicentennial Park

3.3 By 2025, Baldwin County residents and visitors will experience the full development and marketing of Live Oak Landing and Bicentennial Park.

Strategic Goal Lead	Madison Steele- Parks Felicia Anderson- Archives
Strategic Goal Team	Brian Peacock- CIS Junius Long- Building Maintenance Cian Harrison- Finance Wayne Dyess- Administration Sherry-Lea Bloodworth Botop- Administration
Strategies	 ✓ Live Oak Landing Decision Point ✓ Bicentennial Park and Live Oak Landing Marketed and Developed as ONE Destination (PHASE 1) ✓ Bicentennial Park (Historical, Cultural and Natural Resource Focus) ✓ Live Oak Landing (Recreation and Natural Resource Focus)
Action Items	 ✓ Live Oak Landing Decision Point By 8/15/2020, complete cost/benefit analysis, SWOT, etc. on the impact of renewing the current Live Oak Landing contract vs the County taking over day-today operations of the site. By 9/1/2020, a decision will be made to:
	Note: If grant funding is not an option, explore using revenue that is generated from operations as a way to fund pedestrian bridge (reinvesting

revenue back into site)

✓ Bicentennial Park (Historical, Cultural and Natural Resource Focus)

 By 4/1/2021, develop and finalize Town Plan for Bicentennial Park that aligns with the geography of the site and is historical accurate

Note: Historically accurate <u>Farmhouse</u> and <u>Barn</u> are next on the priority list

- By 9/30/2021, the "Old Post Office" will be successfully located to Bicentennial Park. (Currently in Progress) Note: Junius Long noted in phone conversation that it could happen by 12/31/2020
- ONGOING action item to continue researching and exploring funding options for the relocation of historic structures to Bicentennial Park.
- By 6/1/2025, complete research and present plan proposal for partnership in Interpretive Center at Bicentennial Park and Live Oak Landing.

Note: The Interpretive Center will be focused on historical, cultural and natural resource education of the Tensaw Delta. The Center will include items such as:

- Auditorium Space
- Classroom Space
- Research Stations
- Outdoor Amphitheatre
- Access to Tours (walking tours, water tours, etc.)

Live Oak Landing (Recreation and Natural Resource Focus)

 By 1/1/2021, launch marketing efforts in conjunction with the County Parks taking over the day-today operations of the Campground and Store at Live Oak Landing.

Note: Marketing includes Live Oak Landing and the adjacent Bicentennial Park

 By 1/1/2023 (Assuming Grant Dollars are awarded), (4) cabins will be located on the Live Oak Landing site.

Note: If grant funding is not an option, explore using revenue that is generated from operations as a way to fund (4) cabins (reinvesting revenue back into site)

 By 1/1/2023, finalize and approve PHASE 2 plan for the continued marketing and development of Bicentennial Park and Live Oak Landing as ONE Destination.

Note: Plan will include the following:

- Accommodations
- Shelters
- Pavilion Structures
- Hard Surface Parking
- Secure Boat Storage Area

	■ Etc.
Required Resources	To be determined as implementation progresses
Performance Measures	The below are the performance measures used by another County Parks system for its campground: % occupancy of campground (peak) % occupancy of campground (off-peak) # Peak campground sites reserved # Off peak campground sites reserved # Peak campground sites available # Off peak campground sites available \$ Fee revenue per total operating costs

Strategic Priority: Protecting the Natural Environment



Date: July 29, 2020

Overall Status: On Track

Strategic Goal: Regional Retention System for Stormwater

4.1 By 2022, the community will experience a reduction in runoff and flooding through the implementation of a regional retention system for stormwater.

Strategic Goal Lead	Joey Nunnally- Highway Department
Strategic Goal Team	Eddie Harper- Building Department Joe Ryan- Planning Richard Johnson- City of Fairhope Public Works Director Sherry Lea Bloodworth Botop- Administration
Strategies	✓ By 3/1/2021, Develop and implement a Plan for the placement and construction of regional water retention/detention facilities within the 5 watersheds where watershed models have been developed. Use of abandon mines may also be used.
Action Items	 ✓ By 3/1/2021, Develop and implement a Plan for the placement and construction of regional water retention/detention facilities within the 5 watersheds where watershed models have been developed. Use of abandon mines may also be used. By August 2020, Coordinate Hazard Mitigation Plan and watershed studies By 10/1/2020, Secure permission from local jurisdictions that funded the 5 watershed studies conducted by Mr. Curry to use the data By 12/1/2020, Consolidate 5 watershed studies into a single database By 1/1/2021, Explore whether the BCC can use the Home Rule to include regulation of storm water and other environmental issues By 3/1/2021, Develop funding strategies for water retention facilities included in the Plan By 4/1/2021, Establish an environmental planning staff function to coordinate watershed planning and oversight. This position will also coordinate work on 4.3 for water quality in watersheds and contribute to goal 4.2 as well. By 9/30/2023, Write uniform storm water regulations County adopts All municipalities encouraged to adopt As many municipalities as possible adopts
Required Resources	Environmental Planning FTE mid-way through FY20-21

Performance Measures	% Watersheds where flooding is mitigated by regional retention facilities
	ROI equation, ex. Cost of regional retention facilities: Value of property protected

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Date: July 30, 2020

Overall Status: On Track

Strategic Goal: Environmental Investigations

4.2 By 2021, the County in partnership with the District Attorney's Office, will participate in environmental investigations focused on the reduction of environmental crimes.

Strategic Goal Lead	Joe Ryan- Planning
Strategic Goal Team	Wayne Dyess- Administration Bob Wilters- District Attorney Office Teresa Heinz- District Attorney's Office Eddie Harper- Building Maintenance Vince Jackson- Planning Terri Graham- Solid Waste
Strategies	 ✓ Proactive Approach and Dedicated Resources to Focus on Environmental Crimes ✓ Establish More Formal Relationship ✓ Communication Channels
Action Items	Resources likely needed in more than one department ✓ Planning and Zoning ✓ District Attorney's Office ✓ Etc. ✓ Long-Term Strategy- Look into legislative options that might help prevent certain environmental crimes (Commissioner Jeb Ball would likely be a good contact given his prior experience in this field) ✓ Proactive Approach and Dedicated Resources to Focus on Environmental Crimes ○ By 3/31/2021, a dedicated Environmental Planning Resource will be secured. Note: This individual could also look for additional funding streams/Grants to expand services focused on the environment. ○ Joe Ryan would serve as the central Point of Contact between the District Attorney's Office and County Departments ○ By 10/1/2021, secure dedicated for the District Attorney's Office (2 Investigators and 1 Attorney) to help with investigations and the prosecution of environmental crimes.

Note: Explore the option of using solid waste funding for these resources

Establish More Formal Relationship

- Between Planning & Zoning, Solid Waste, etc. and the District Attorney's Office
- o Planning & Zoning, Solid Waste, etc
 - Identify or learn about an issue
 - Try to facilitate resolution
 - If not possible, and a civil matter, they pass along to County Legal Department
 - Focus on environmental clean-up
- District Attorney's Investigators and Attorney
 - Identify or learn about an issue
 - Try to facilitate resolution
 - If not possible, look to prosecute or sue (if civil)

✓ Communication Channels

 By 8/15/2020, Joe Ryan and Trey Dickson connect to discuss and confirm communications channels for Environmental Crimes across County partners (Planning & Zoning, Solid Waste, District Attorney's Office)

Note: Recommend documenting this process to some degree (comment from Jeremy)

- Possible Partners
 - Planning & Zoning
 - Solid Waste
 - Police Departments in Municipalities
 - Baldwin County Sheriff's Office
 - District Attorney
 - ADEM
 - State Health Department
- By 20XX (need date), establish Microsoft Team for each Case so that multiple parties can access and see status of case and what has and has not been accomplished, etc.

Note: Terri Graham mentioned this as something that will be happening and it might be underway.

 By 20XX (need date), add to website a place to file complaint OR report suspicious environmental activity.

Note: Will need to define "suspicious environmental activity" and train call center on how to route calls

Required Resources

Environmental Planning FTE mid-way through FY20-21 2 Investigators and 1 Attorney as part of FY21-22 budget process

Performance Measures	# cases investigated
Performance ivieasures	# cases investigated
	# case investigations requested
	Note: It will be important to measure the above output and demand measures to tell your story in terms of the cases you are working and the demand for
	environmental investigations.



Date: July 31, 2020

Overall Status: On Track

Strategic Goal: Increased Transparency and Accountability for Watershed Quality

4.3 By 2021, the community will experience increased transparency and accountability for watershed quality through regular testing and reporting of water quality and the ongoing development of partnerships with citizens and groups interested in the environment.

Strategic Goal Lead	Celena Boykin- Planning
Strategic Goal Team	Dan Dealy- Baldwin County Consultant Joey Nunnally- Highway Department Sherry Lea Bloodworth Botop- Administration Ashley Campbell- City of Daphne Environmental Department Terri Graham- Solid Waste
Strategies	 ✓ Develop Model set of scientifically based regulations for water quality for the entire County ✓ Develop and implement a public education and engagement initiative ✓ Determine funding strategy for testing and mitigation
Action Items	 ✓ Develop Model set of scientifically based regulations and testing strategies for water quality for the entire County ○ By August 2020, determine what organizations can do testing and/or mitigation and can be trusted to do so objectively ○ By November 2020, Research which watersheds have been tested within the past 2 years ○ By November 2020, Research which watersheds are being tested on an ongoing basis ○ By November 2020, Develop GIS map reflecting testing research ○ By November 2020, Establish integrated source on the County's website for watershed information. ○ By 3/1/2021, Establish multiagency work group ○ By 3/1/2021, Review all regulations in use by all jurisdictions within the County to identify similarities and best practices. ■ Regulations can accommodate the individuality of each watershed ■ Include future development projections ○ By October 2021, Plans are developed by local jurisdictions including ■ Standardized Testing ■ Standardized storm water regulation ○ By 8/1/2021, Consistent permitting regulations are established for storm water among and across municipalities and subdivisions within the County, i.e. storm water regulations are aligned.

	 ✓ Develop and implement a public education and engagement initiative By 10/1/2021, Develop and implement a public education and engagement initiative ✓ Determine funding strategy for testing and mitigation By 4/1/2023, determine funding strategy for testing and mitigation. Consider the following possibilities Grants Other local governments, collaboration with those impacted by water quality Polluter fees Rate Payer fees NRCS – Emergency Watershed Protection funds
Required Resources	To be determined as implementation progresses
Performance Measures	% Watersheds with ongoing testing % Local municipalizes adopting the standardized regulations for water quality

Strategic Priority: County Government



Date: July 31, 2020

Overall Status: On Track

Strategic Goal: Annual Performance Report

5.1 Beginning in October 2021, Baldwin County residents will experience increased transparency and accountability with the issuance of an Annual Performance Report.

Strategic Goal Lead	Wayne Dyess- Administration NOTE: We strongly recommend Wayne be the lead or at least co-lead on this one, given his role.
Strategic Goal Team	Deidra Hanak- Personnel Armondo Love- Personnel Ron Cink- Budget Anu Gary- Administration Cian Harrison- Finance
Strategies	 ✓ Communication Plan ✓ Defining Components of the Performance Report ✓ Data Collection ✓ Build the Report ✓ Long Term Strategies
Action Items	 ✓ Communication Plan ○ By 10/1/2020, send out initial communication to staff about the fact that Baldwin County has a Strategic Plan ○ By 10/1/2020, let staff know that there is a goal in the Plan to begin the creation of an Annual Performance Report. ○ By 10/1/2020, Communicate to staff the overall role Departments will play in collecting data and beginning to tell their story as part of this goal, and possibly beyond (as the County moves to become more performance driven).
	 ✓ Defining Components of the Performance Report By 10/30/2020, define the components of the 1st Annual Performance Report What are we asking Departments to create, collect, etc? What are the requirements of the process? Good idea to look at other jurisdiction reports and what other communities are doing. By 10/30/2020 or before, gain consensus about moving ahead by having Department Head Meeting and making recommendation at that meeting. At this meeting, discuss roles (Who will be meeting with Departments and what are the details?) Set a schedule for Department meetings and also follow-up check-ins that will occur on a regular basis.

✓ Data Collection

- By 10/30/2020, make a decision about data collection and whether departments would collect data in separate databases or input their data into a centralized database.
 - As part of this, the County will need to determine the performance period for the first year of data collection. For many, this is probably 10/1/2020 – 9/30/2021, but there may be some departments who will not have a year's worth of data.
 - Meet with Departments to discuss their capabilities and their needs around performance measures and data collection.
 - It would be good for these conversations to become ongoing quarterly meetings about performance.

✓ Build the Report

- By January 2022, the first annual Baldwin County Performance Report will be published.
 - Note: Performance period will end on 9/30/2021 and compilation will be underway knowing that it will take a few weeks to get end of year data reported.
 - The Plan will be built and populated where possibility throughout the year so that it is not a last-minute project. Question to be answered are the following:
 - Who puts it together?
 - What is the approval process?
 - Do we do it all in-house or contract out for a part of it like printing, creative design etc.?

✓ Long Term Strategies

- Research software systems that are designed for managing and reporting performance measures. There is a local government market for these systems.
- Overall County Approach:
 - Consistent language across departments in terms of organizational structure. Currently each department has its own language and what it calls each area of operation. Ex: Division or Cost Center, etc. County needs consistency

Misc. Notes --- Ideas for what an Annual Performance Report might be

- State of the County Report Might be a good idea to do an intro video as well
- Progress Report
- Telling about the positives and what has been accomplished
- Also reporting on challenges and roadblocks to success and the plan to address these challenges
- o Incorporating Community feedback where possible
- County Goals ---- progress made on those goals ---- and next steps
- County Departments and their performance
 - Accomplishments
 - Performance Measures:

	 Must ensure the right measures and the right types of measures (results vs simple counts of effort) exist in every Dept and Agency Must provide context with datanot just graphs but also an explanation Graphs should be present Quotes Success Stories NOTE: Use Employee Recognition Program as a way to populate this part of the Performance Report Publish as a hard copy report, brochure and also digital that is mobile friendly
Required Resources	To be determined as implementation progresses
Performance Measures	To be determined as implementation progresses



Date: July 31, 2020

Overall Status: On Track

Strategic Goal: Employee Recognition Program

5.2 By November 2021, Baldwin County will experience a customer-focused and supportive County Organization culture through the implementation of an employee recognition program.

Strategic Goal Lead	Deidra Hanak- Personnel
Strategic Goal Team	Wayne Dyess- Administration Deidra Hanak- Personnel Armondo Love- Personnel Sherry Lea Bloodworth Botop- Administration Anu Gary- Administration
Strategies	✓ County-Wide Approach✓ Recognizing Talent and Good Work. Telling Our Story!
Action Items	 ✓ County-Wide Approach Timing = November − December each year Program Agenda Professional Development component. Maybe a Guest Speaker Recognition of employees:
	 ✓ Recognizing Talent and Good Work. Telling Our Story! By 10/1/2020, restart "Employee of the Quarter" These award winners all go toward "Employee of the Year" ONGOING, continue "We Care Wednesday" spotlights By 10/1/2021, incorporate "Employee of the Quarter" and "We Care Wednesday" into the overall TRAINING AND EMPLOYEE RELATIONS approach at the County By 10/1/2021, secure funding for the November-December 2021 Employee Recognition event. By 11/2021, first annual Employee Recognition event will take place

	Misc. Notes:
	Re-launch "Employee of the Quarter" Certificate Success story articles on the web and possible the Annual Performance Report Ongoing Quarterly Employee Recognition Recognition for great Customer Service, great performance, etc. Employees can nominate employees Public can nominate Department Directors help confirm nomination and add additional information We Care Wednesday Spotlights employees and their stories Speaks to the impact they make in their job Published on Social Media, etc. Research Leadership Academy Models (Armondo Love) Need a Steering Committee When does the Leadership Academy look like? When will it begin? Etc.
Required Resources	To be determined as implementation progresses
Performance Measures	To be determined as implementation progresses



Date: July 31, 2020

Overall Status: On Track

Strategic Goal: Timely Customer Service Response

5.3 By December 2021, community and citizen inquiries will receive a response or return phone call within 24-72 hours.

Strategic Goal Lead	Shannon Spivey- Citizen Service Center
Strategic Goal Team	Brian Peacock- CIS Armondo Love- Personnel
Strategies	✓ Implementation of the Case Management Solution (DMS) ✓ Establish the Service Level Standards
Action Items	 ✓ Implementation of the Case Management Solution (DMS) By 10/1/2021, Multiple Department work group established By 2/1/2022, Create Project Plan for the CMS By 12/1/2022, CMS Live By 11/30/2022, All County staff are trained on the SLA standards for their services and their participation in the CMS ✓ Establish the Service Level Standards By 3/1/2022, Establish descriptions of the 5 service delivery standards, including response timeliness, for County services. By 9/30/2022, Departments determine the service level standards (5) for each service, including response timeliness. By 10/2022, Service level standards, including response timeliness, are placed into the Service Level Agreements (SLA) to be signed by the Department Head.
Required Resources	To be determined as implementation progresses
Performance Measures	% Departments meeting or exceeding service delivery standards in SLA's % Departments meeting or exceeding response time standards in SLA's



Date: July 31, 2020

Overall Status: On Track

Strategic Goal: Government Partnerships

5.4 By 2022, the community will experience enhanced service delivery through the initiation and continuation of regional partnerships with municipalities, adjoining Counties, Boards of Education, etc.

Strategic Goal Lead	Sherry Lea Bloodworth Botop- Administration
Strategic Goal Team	Joey Nunnally- Highway Department Zach Hood- EMA Jenni Guerry- EMA
Strategies	 ✓ Partner with Municipalities for the use of REBUILD Transportation Funds ✓ Educational Initiative - Focus on how the tax structure works between County, Municipalities, and the State ✓ County Emergency Management will create and implement a capacity building initiative with and for Municipal EM functions ✓ Commissioner, Mayor, School Board Engagement Meetings ✓ Develop and Implement a Strategic Communications Plan for rolling out the Baldwin County Strategic Plan
Action Items	 ✓ Partner with Municipalities for the use of REBUILD Transportation Funds Cost sharing between the County and Municipalities with REBUILD Funds on transportation projects Maximize impact for small REBUILD funds for County and Municipalities Consolidate efforts and shared documentation to meet State requirements ✓ Educational Initiative - Focus on how the tax structure works between County, Municipalities, and the State Focus on BCC Members Mayors
	 ○ School Board Members ✓ County Emergency Management will create and implement a capacity building initiative with and for Municipal EM functions ○ Focus on: Cost documentation and recovery processes Training Joint Exercises Grants Coordination Public education coordination Disaster response coordination, e.g. SAR, HASMAT, Health Mass notification coordination

	 ✓ Commissioner, Mayor, School Board Engagement Meetings Specific Topics, e.g. Planning and Zoning, Transportation, EMA, etc. ✓ Develop and Implement a Strategic Communications Plan for rolling out the Baldwin County Strategic Plan
Required Resources	To be determined as implementation progresses
Performance Measures	To be determined as implementation progresses



SAVANNAHFORWARD



City of Savannah Strategic Plan

Adopted August 31, 2017



STRATEGIC PLAN



PUBLIC SAFETY



INFRASTRUCTURE



NEIGHBORHOOD REVITALIZATION



ECONOMIC STRENGTH & POVERTY REDUCTION



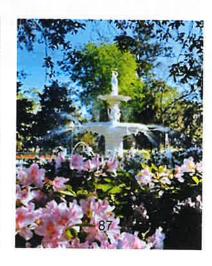
GOOD GOVERNMENT

VISION:

Savannah, an extraordinary place to live, learn and prosper.

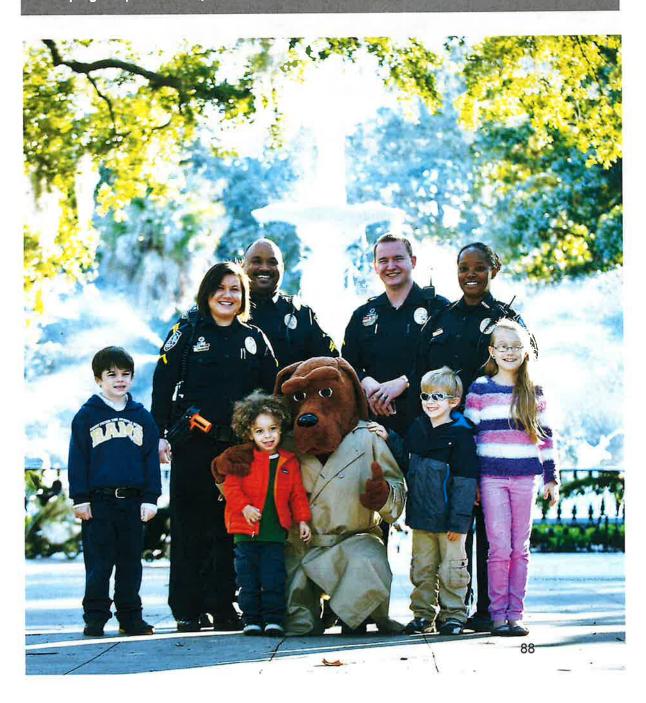
MISSION:

The mission of the City of Savannah is to provide exceptional public services to residents, businesses and guests so they may experience a safe, healthy and thriving community.





Public Safety is achieved when City Government and the Community work together to create a City where people feel safe in their neighborhoods and where the crime rate is low. On any given day, the public's safety is of primary importance in the minds of City leaders as they put policies in place, allocate resources and work to provide protection and enforcement for Savannah's residents, businesses and guests. Operationally, keeping the public safe presents an ever-changing set of challenges.





GOALS

- 1.1. CALL RESPONSE By 2021, 95% of all Priority 1 calls will be responded to within seven minutes or less.
- 1.2. REDUCTION IN PART 1 VIOLENT CRIMES By 2022, residents will experience a reduction in Part 1 violent crimes from 1,121 to 817. (27% reduction; 1,121 is the average of years 2015 and 2016.)
- 1.3. RESIDENTS FEELING SAFE IN THEIR NEIGHBORHOODS By 2025, 75% of residents will report that they feel safe in their neighborhoods.
- 1.4. MEDICAL 911 BLS AND ALS SUPPORT SERVICES By 2023, Savannahians making 911 calls for an emergency medical incident will receive first responder or higher level services within five minutes or less, at least 90% of the time.
- 1.5. FIRE RESCUE DEPARTMENT ADVANCED LIFE SUPPORT SERVICES By 2025, the Fire Rescue Department shall provide an advanced life support (ALS) response within eight minutes at least 90% of the time.



Savannah's future safety and prosperity depends on safe and sound infrastructure, including access to the internet. Flooding is a part of life along coastal regions but the City of Savannah is committed to protecting residential and business structures and streets from its devastating impacts. Our City's streets, sidewalks and facilities are a reflection of who we are and the pride we take in our community. They are also essential to helping residents travel to and from educational and employment opportunities. The City is committed to making these essential investments over time.





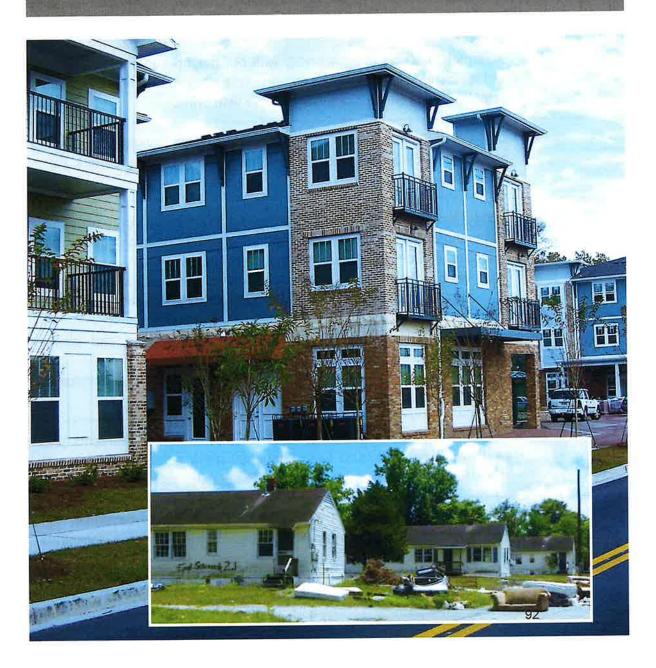
GOALS

- 2.1. RESURFACING SAVANNAH STREETS By 2022, Savannah streets will be on a 20-year resurfacing rotation.
- 2.2. SIDEWALKS By 2025, 60% of high traffic roadways and streets, including routes to schools, in Savannah will have sidewalks on at least one side of the road.
- 2.3. BUILDING FLOODING By 2025, the City of Savannah will reduce by 25% structure flooding resulting from a 25-year rain event (8 inches of rain within a 24-hour period).
- 2.4. STREET FLOODING By 2025, the City of Savannah will experience a 5% reduction in street flooding resulting from a 25-year rain event (4.9" inches of rain within a 2-hour period).
- 2.5. CITY FACILITIES By 2023, 50% of City facilities will meet or exceed City or applicable agency established standards.
- 2.6. INTERNET COMMUNICATIONS CONDUIT By 2020, right of way work that takes place in the City of Savannah will include a requirement to install internet communications conduit.



NEIGHBORHOOD REVITALIZATION

Savannahians live in neighborhoods, where much of their lives are spent. We raise our families, our children play there and when possible we work there. So, it is essential that the City focus on key neighborhood issues such as access to quality, affordable housing, recreational facilities and programs, as well as the challenges of poverty and blight. Streets, sidewalks and trails connect our neighborhoods, creating a sense that we are 'One City'. The vision is that 'Savannah is an extraordinary place to live, learn and prosper'. The City is committed to that vision and will work to achieve the results to further enhance that as a reality.



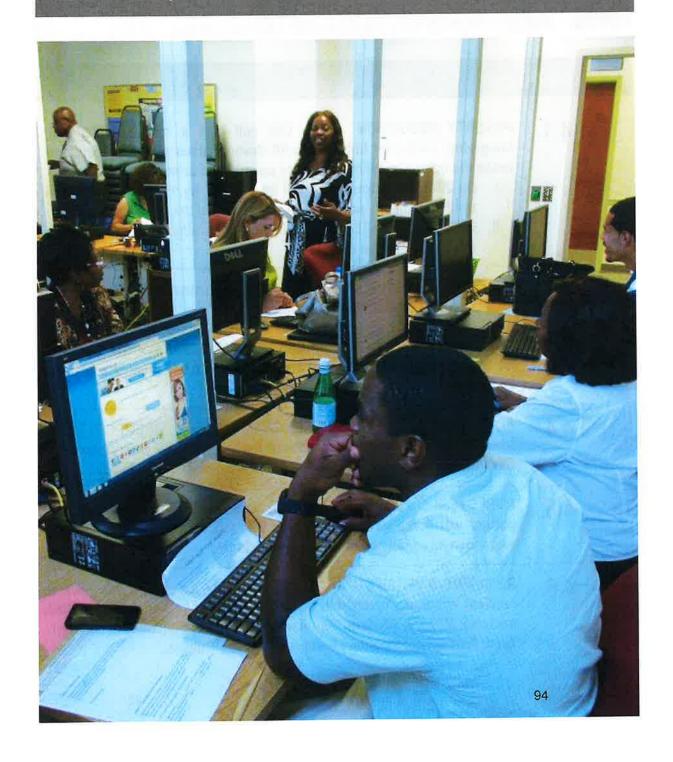


GOALS

- 3.1. REESTABLISH AND PRESERVE NEIGHBORHOODS By 2022, the City of Savannah, working in partnership with our neighborhood associations and residents, will reestablish and preserve vibrant, livable, sustainable neighborhoods where Savannahians live with pride.
- 3.2. CITY-OWNED PROPERTIES By 2019, the City of Savannah will meet or exceed its own standards for maintaining City-owned properties. (i.e.: streets, sidewalks, trails, etc.)
- 3.3. MOBILITY AND NEIGHBORHOOD CONNECTIVITY By 2023, the residents of Savannah will experience improved and safe multi-modal mobility and neighborhood connectivity as evidenced by the following:
 - I. Work with CAT to fill public transportation service gaps within the City to ensure that all neighborhoods are within ¼ mile of a transit stop where appropriate
 - II. 75% of neighborhoods are connected to walking and biking infrastructure (i.e.: trails, routes, sidewalks, lanes)
 - III. 75% of pedestrians shall feel safe walking along and through streets and intersections in the City
- 3.4. ACCESS TO RECREATION By 2021, 75% of Savannah residents and youth will have access to well-maintained playing fields, facilities and recreational programs within 3/4 mile of their neighborhoods.
- 3.5. ACCESS TO QUALITY HOUSING By 2025, the City of Savannah will provide 2,800 households (approximately 350 per year) with access to improved housing.



The City of Savannah is committed to doing its part to raise our residents out of poverty; prepare youth and adults to participate in the economy, and be self-sufficient; line our commercial corridors with viable, appropriate businesses and create a resilient, balanced economy for all.





GOALS

- 4.1. POVERTY REDUCTION The City will lead a multi-jurisdictional, integrated, multi-year initiative to lift Savannahians out of poverty and break the inter-generational cycle of poverty and crime:
 - I. By 2021, the poverty rate will be reduced by 1% every four years until Savannah's poverty rate is at or below the state-wide level.
 - II. By 2025, there will be a 20% reduction in the number of Savannahians experiencing food insecurity.
- 4.2. COMMERCIAL CORRIDORS By 2022, Savannah will complete an assessment of its commercial corridors.
- 4.3. SOFT SKILLS & WORK READINESS TRAINING FOR SAVANNAH YOUTH By 2022, 50% of Savannah high school age youth will receive soft skills and work readiness training.
- 4.4. SOFT SKILLS & WORFORCE TRAINING FOR UNEMPLOYED & UNDEREMPLOYED By 2022, 15% of unemployed and underemployed Savannah adults will complete soft skills and workforce training.
- 4.5. EMPLOYMENT ASSISTANCE By 2022, 25% of graduates from City and partner workforce training programs will secure employment in living wage jobs as calculated for a single individual.
- 4.6. RESILIENT DIVERSIFIED ECONOMY By 2025, Savannah will have a resilient economy, diversified among the following (or new identified sectors): Military; Tourism; Manufacturing; Health; Education; Film; High Tech; Aerospace; Financial Services; Arts and Culture.



GOOD GOVERNMENT

The mission of the City of Savannah is to provide exceptional public services to residents, businesses and guests so they may experience a safe, healthy and thriving community. A Government that is committed to analyze and improve its own performance, and inform taxpayers of services they are receiving for their money in terms of results, is the essence of accountability and transparency. The City of Savannah is committed to creating a culture focused on results for customers and ensuring the community receives exceptional public service.





GOALS

- 5.1. ONLINE DASHBOARD By 2020, residents will have access to an online dashboard to obtain information on the City's performance in regards to implementation of the Strategic Plan's priorities, goal strategies, action items and performance measures.
- 5.2. ORGANIZATIONAL CULTURE The City's organizational culture will be recognized as customer-focused, responsive and proactive through the following:
 - I. By 2019, Savannah residents will have an opportunity to participate in a regularly scheduled, statistically valid customer survey.
- 5.3. PERFORMANCE BASED BUDGET By the end of 2020, 100% of the City budget will be attached to measurable results developed in Department Strategic Business Plans.
- 5.4. EFFICIENT GOVERNMENT OPERATIONS ENERGY EFFICIENT By 2023, City government will be consciously committed to efficient government operations as evidenced by:
 - 15% of City's vehicle fleet will be powered by alternative fuels or hybrid technology.
 - II. 30% of City facilities will be certified per the Energy STAR Program.
- 5.5. EMPLOYEE RECOGNITION & PERFORMANCE By 2021, Savannah City employees will be recognized and acknowledged as a high performing organization as evidenced by:
 - 100% of employee performance will be aligned to performance measures in their Department Strategic Business Plans.
 - II. 100% of employee classifications will be considered competitive with benchmarked communities.
- 5.6. CITY CODE UPDATE & REVIEW Beginning in 2018, the City of Savannah will review and update its Code of Ordinances every five years.
- 5.7. AAA BOND RATING By 2030, Savannah will obtain a AAA Bond Rating.



Performance Clackamas

Clackamas County Strategic Plan

January 2020 Update

Strategic Priority: Build Public Trust through Good Government

Public trust is the currency of good government. Clackamas County will design and deliver services that make a difference and measure our effectiveness in terms of results for our customers. We will listen, be accountable and deliver what we promise. When we allocate resources, they will be tied to results that matter. Updating the County Courthouse will ensure that key public safety services are safe and accessible to all residents.

Results

- By 2023, build a new County Courthouse
- By 2021, the county's budget will be 100% tied to results with transparency to the public.



Strategic Priority: Grow a Vibrant Economy

The future prosperity of County residents will be built on good paying jobs that support families, housing affordability, a growing diverse qualified workforce, capital investments that grow current businesses, and on the availability of lands where new businesses can easily locate and expand within the County.



Results

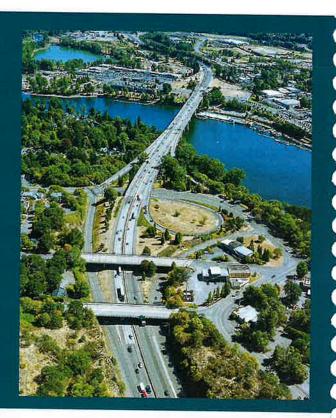
- By 2024, 80% of employers within targeted clusters surveyed will report that an adequately trained workforce is available to fill their family wage jobs.
- By 2024, 80% of businesses that pay family wage jobs seeking to locate or expand in Clackamas County will find serviceable commercial or industrial properties which meet their particular business needs.
- By 2024, 75% of participants in the Community Prosperity pilots have experienced improvement in financial stability and access to affordable, healthy foods.

Strategic Priority: Build a Strong Infrastructure

Ensure long-term investments in infrastructure that will support the diverse needs of Clackamas County residents, including: a thriving economy, living wage jobs, housing and transportation alternatives, and a healthy environment.

Results

- By 2024, funding for the next Phase (from 122nd-172nd) of the Sunrise Gateway multimodal corridor improvements will be committed from federal, state, and/or regional funding sources.
- By 2024, funding for the Interstate 205 (I-205) Widening and Seismic Improvements Project, including the Abernethy Bridge, will be committed from federal, state, and/or regional funding sources.



Strategic Priority:

Ensure Safe, Healthy and Secure Communities

A focus on the well-being of all our families and communities reflects the best of our character. Investments in providing services to those needing care, addressing hunger, homelessness, addictions, behavioral health needs, and reducing crime, are key to making our communities safe. These efforts, combined with success in creating jobs and addressing homelessness, will give definition to the County's efforts to alleviate poverty and will help ensure the safety, health, and security of our residents.

Results

• By 2024, 80% of victims of domestic violence will not

experience further abuse following their initial report.

 By 2025, 1,500 affordable housing units will be developed*. Those units will be stratified across

Lead responsibility	Units	AMI
All County	700	61-110%
Mostly H3S	800	0-60%

* Included in the overall count are rehabbed units, and units at various construction phases (Viable, Committed, In Development, and Completed).

Area Median Income (AMI) ranges as shown above.

Reduce chronic homelessness as evidenced:

- By 2023, 30% reduction of chronically homeless people on the Coordinated Housing Access waitlist.
- By 2023, 30% reduction in homeless children and youth (24 and under) on the Coordinated Housing Access waitlist

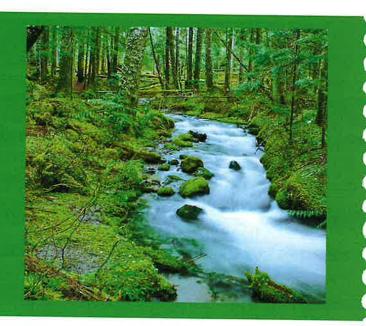


Strategic Priority: Honor, Utilize, Promote and Invest in our Natural Resources

The abundant natural resources in both urban and rural areas of Clackamas County provide extraordinary economic and recreational opportunities. A balanced sustainable approach to our natural resources will generate prosperity and help secure and conserve those resources for future generations.

Result

 By January 2022, a Climate Action plan is adopted for our community with specific recommendations to reach the goal of being carbon neutral by 2050.



Policy Perspectives

Moving forward, four important lenses will be applied to decisions the County makes regarding policy, operations, budget and purchases. Applying these lenses will enhance the strategic results:

- · Equity, Diversity, and Inclusion
- Carbon Neutrality, including developing and implementing a Climate Action Plan
- Healthy and Active Lifestyle, guiding housing, transportation, and land use policies and decisions
- Family Stability, including an emphasis on issues of domestic violence, homelessness and workforce development







Key Initiatives

In addition to the Priorities and Results in the Strategic Plan, the County will provide leadership to develop policies and partnerships for Key Initiatives as follows:

- Being a catalyst and a convener to stimulate the development of Workforce Housing for those with 60% or less of the Area Median Income.
- Growing the Mass Timber industry in Clackamas County, which creates family wage jobs.
- Making high speed internet available throughout the County.
- Pollination Policy Initiative, including a hub to share information to government and private landowners.

Board decisions will be informed by managing for results performance information for ongoing operations.

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Consulting Methodology Intellectual Property

Managing Results, LLC (MR) Methodology (both standard and modified) is the proprietary intellectual property of MR. The MR methodology contains, and is imbedded in various methodologies, trade secrets, software, definitions, graphics, presentations, and guidelines that are the sole proprietary intellectual property of MR. Through this proposal and after a contract has been signed, MR is providing a non-exclusive, perpetual license for use by the City of Birmingham, MI of the MR Methodology. Much of the MR Methodology is contained but is not limited to the copyrighted Managing Results Resource Guide to Strategic Business Planning. The City of Birmingham may use it only for its own internal purposes and shall keep the MR Methodology confidential, and under no circumstances will the City of Birmingham or other staff or agencies of the City of Birmingham, except as agreed by MR in writing, disclose the MR Methodology to other third parties, either individuals, or governmental or private sector organizations. All changes or derivative work made to the MR Methodology shall remain the exclusive property of MR. Notwithstanding the foregoing; all information produced by the City of Birmingham in utilizing the MR Methodology, including the City Strategic Plan and Implementation Plan roadmap, shall be considered the exclusive property of the City of Birmingham, MI.

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CITY OF BIRMINGHAM, MI STRATEGIC PLAN RFQ MAY 2, 2022

> STRATEGIC ACTION PLAN



Create Future Intelligence™



Submitted by:

Future iQ, Inc.

P.O. Box 24687 Minneapolis, MN 55424 www.future-ig.com

City of Birmingham

MAY 4 2022

David Beurle david@future-iq.com 612-757-9190

City Manager's Office

Heather Branigin heather@future-iq.com 612-757-9121



Future iQ, Inc. P.O. Box 24687 Minneapolis, MN 55424

May 2, 2022

Melissa Fairbairn Assistant to the City Manager City of Birmingham 151 Martin Street Birmingham, MI 48009

RE: City of Birmingham Strategic Plan RFQ

Dear Ms. Fairbairn,

Future iQ is pleased to submit this proposal to serve as the consultant team to facilitate the development of Birmingham's Strategic Action Plan.

Future iQ has a strong track record of designing and implementing visioning and strategic planning projects across North America, Europe and Australia. Some of the strengths we believe we bring to this project include:

- We specialize in visioning, strategic planning, and stakeholder engagement. Stakeholder engagement and collaboration building are cornerstones of Future iQ's visioning and strategic planning methodology. Our planning process specializes in applying innovative tools and approaches that bring together stakeholders to create collaborative strategic action plans, and an aligned vision for the future. Importantly, our planning process provides a collaborative place for participants to share expertise and ideas, and to openly consider various perspectives on issues of concern. We have a team of accomplished facilitators who are well versed in steering stakeholder discussions and exploring local sensitivities and aspirations.
- We understand the need for balanced community and economic development. We have worked with many cities, towns, counties, and regions at points-in-time when communities have reached generational change, industry tipping points, and other scenarios that involve significant redevelopment phases. For example, our work with Edina, Minnesota, involved extensive public engagement with businesses, neighborhood and housing associations, community organizations and individual homeowners as they dealt with issues such as teardowns and rebuilds, affordability and equity, environmental leadership, and transportation innovation. Balancing the need for sustainable development as well as the need to maintain the essential character and

- charm of the community was crucial in the visioning process. Future iQ will bring this sensitivity to Birmingham's visioning and strategic planning process.
- We bring a future oriented perspective. Future iQ specializes in studying and understanding larger emergent trends and influences that are re-shaping industries and regions, especially in the Midwest. We hosted a global Think Tank forum at Windsor Castle (UK) on 'Building Sustainable Regional Communities' and hosted an additional Think Tank forum there on 'The Future of Urban Living' in December 2019/20. We have also published foresight research on 'Cities of the Future', 'Next Industrial Revolution', 'The Future of Tourism', 'Future of Manufacturing', , 'Economics of Collaboration', and the 'Future of Food'. This experience and knowledge help us shape truly future oriented planning processes.
- We understand the power of good data. Future iQ specializes in sophisticated data collection and analysis. We believe that good stakeholder engagement processes and data collection, presented in a transparent and interactive manner, can help build rapid alignment around key points of consensus.

Future iQ delivers innovative and customized projects on time and on budget. Our hands-on approach, as well as the effectiveness of our methodology, will help the community stakeholders of Birmingham to maximize the value of the visioning and strategic planning process and achieve realistic actionable outcomes.

It would be our privilege to work with the City of Birmingham on this initiative. Please contact me for clarifications as needed. Thank you for your consideration.

Yours sincerely,

David Beurle

CEO, Future iQ, Inc.

Tel: 612-757-9190

Javil Lewer

Email: david@future-iq.com

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1.0 Professional Qualifications

The client-facing Future iQ team members presented in this proposal have significant experience and training in working on community visioning, strategic planning, and economic development projects. We recognize that this project requires significant periods for intensive workloads and our team availability will allow sufficient team resources to be deployed, both on-site (if possible) and/or virtually, and for data analysis and report preparation. The proposed team members are an experienced and reliable team, with a complementary mix of required skills in:

- Highly developed critical thinking capacity in the areas of visioning and strategic planning, organization design, and collaboration building
- Knowledge and experience with counties, cities, municipalities, corporations, regional entities, and non-profit organizations
- Detailed practical experience in research, stakeholder engagement, economic and data analysis and data visualization
- Project management and stakeholder workshop facilitation, including extensive experience in foresight research, economic and workforce development, industry cluster development, economic analysis, and impacts research

Below are the respective roles of team member for this project:

Team Member	Title	Role
David Beurle	CEO, Future iQ	Project Director, facilitation, strategy
		development, engagement
Heather Branigin VP, Foresight Research		Research, strategy development
Celine Beurle	COO	Communications strategy and plan
Tobi Adaramati	Data Analyst	Data analysis
Walter Paixao-Cortes Data Engineer		Data analysis, data visualization

As requested in the RFP, please see team resumes in **Appendix A** for educational background, training, and relevant experience of each team member.

2.0 Specialized Experience of Team

2.1 Firm Background – About Future iQ

Future iQ is a global research and consulting company specializing in visioning, community engagement, and strategic planning for cities, regions, organizations, communities, and industries. Founded in 2003, and headquartered in Minneapolis, Future iQ's global footprint brings a broad perspective and delivers transformational customized solutions to local environments. With seven staff members, four strategic partners and four country representatives, Future iQ's clients span North America, Europe, and Australia. Future iQ works across cultures, sectors and languages to shape unique and effective planning solutions for our clients. The team members assigned to this project have extensive experience with visioning, strategic planning, and economic development projects in the United States.

We recognize that this project requires significant periods for intensive workloads and our team availability will allow sufficient team resources to be deployed, both on-site and/or virtually, and for data analysis and report preparation.

Future iQ specializes in the following functional and sector areas:

- City, Urban and Regional Planning
- Economic and Workforce Development
- Defense Sector Engagement
- Organizational and Corporate Planning
- Non-profit Strategic Planning
- Tourism Industry Planning and Analysis

Future iQ's specialized methodology includes:

- Strategic Planning and Visioning
- Stakeholder Engagement
- Network and Supply Chain Mapping
- Data Visualization
- The Future Game
- Customized Foresight Research

For more information, please visit Future iQ's website at: http://future-iq.com



WELCOME TO THE FUTURE IQ RESEARCH

2.2 Community Visioning and Strategic Planning Experience

Future iQ has significant experience in visioning and strategic planning for cities, counties, corporations, nonprofits, and regions. Below are links to recent strategic planning projects and their accompanying reports. For additional detailed project experience, please visit: https://lab.future-iq.com and https://future-iq.com/featured-projects/

City and Regional Strategic Plans

- City of Smithville, MO Community Vision and Strategic Action Plan
- University City, MO Community Vision 2040 and Strategic Action Plan
- Greater Mankato Growth, MN Regional Vision and Action Plan
- Tillamook County, OR <u>Tourism Investment Strategic Vision Action Plan</u>
- City of Coppell, TX Community Vision and Strategic Action Plan
- City of Trotwood, OH <u>Organizational Strategic Action Plan</u>
- City of Mitchell, SD Community Vision and Strategic Action Plan
- City of Moab, UT <u>Community Vision and Strategic Action Plan</u>
- Town of Falmouth, ME <u>Community Vision and Strategic Action Plan</u>
- Park City Vision 2020, UT Community Vision and Action Plan
- Town of Hilton Head Island, SC Community Vision and Strategic Action Plan
- City of Edina, MN, <u>Vision Edina</u> and <u>Nodes and Modes</u>
- City of Wayzata, MN Wayzata 2040 Community Vision
- B.E.S.T. of Waseca County, MN <u>Community Vision and Strategic Action Plan</u>
- City of McKinney, TX Solid Waste Management Strategy
- City of Denton, TX Comprehensive Solid Waste Management Strategy

Organizational Strategic Planning, Economic Development, and Visioning

- National Association of Development Organizations (NADO), DC <u>Strategic Action Plan</u>
- East Central Iowa Comprehensive Economic Dev. Strategy, IA Envision East Central Iowa
- Edina Chamber of Commerce, MN <u>Economic Development Strategy</u>
- IMEC Future of Manufacturing in Illinois <u>Strategic Visioning</u>
- Economics of Collaboration <u>Foresight Report</u>
- Greater Bemidji, MN <u>Strategic Action Plan Update</u>
- New North Business Intelligence Initiative, WI Regional Business Strategy
- Moosehead Lake Region Economic Development Corporation, ME, <u>Strategic Action Plan</u>
- ChiroCongress, OR <u>Strategic Visioning and Planning</u>
- McHenry County College, IL <u>Board and Stakeholder Foresight Session and Report</u>
- CEDA/USDA, ID <u>Economic Development Training Think-Tank and Report</u>
- Community Action Partnership of Hennepin County, MN <u>Strategic Action Plan</u>
- Iowa Department of Natural Resources, IA <u>Strategic Vision for Iowa</u>
- Griffith Foods, IL Global Executive Think-Tank and The Future of Food Foresight Report
- The Next Industrial Revolution, PA <u>Foresight Report</u>
- Cities of the Future Foresight Report

Department of Defense Strategic Planning

- The Middle Georgia Innovation Project, GA Strategic Planning and Visioning
- City of San Diego, CA, Regional Defense Industry Vision and Strategic Roadmap
- New Hampshire Aerospace and Defense Consortium (NHADEC), NH <u>Strategic Action Plan</u>
- New England Regional Defense Industry Collaboration Initiative
- Greater Lima Region, OH <u>Collaborative Growth Plan and Gap Analysis Reports</u>
- Fox Valley, WI <u>Collaborative Action Plan</u>
- Texarkana Defense Project, TX Strategic Implementation Plan

International Regional Planning Experience:

Future iQ's tourism experience includes international locations in Italy, Spain, and Ireland. This work has spanned specific tourism projects and helping build collaborative strategic planning in tourism dependent economies.

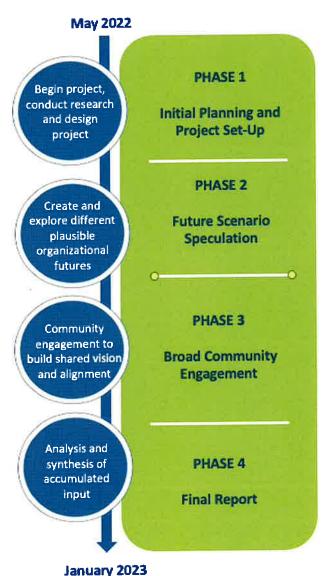
- Agriparco Montespertoli, Agricultural Park Action Planning Tuscany, Italy
- Mediterranean Ports Project, Strategic Plan Italy and France
- Mountains of Leon, Regional Development Northern Spain
- Ireland National Tourism, The Gathering Ireland
- Canary Islands Spain

3.0 Creativity and Suitability of Proposed Scope of Services

3.1 Proposed Project Plan

The proposed project plan is implemented in four phases that build momentum around an aligned vision for the City of Birmingham. The Strategic Action Plan is intended to be inclusive, equitable and sustainable. It will unify community stakeholders, identify future opportunities, and align resources for development throughout the city. The scope of work outlined in the RFQ is incorporated into the four phases outlined below.

Proposed Project Plan

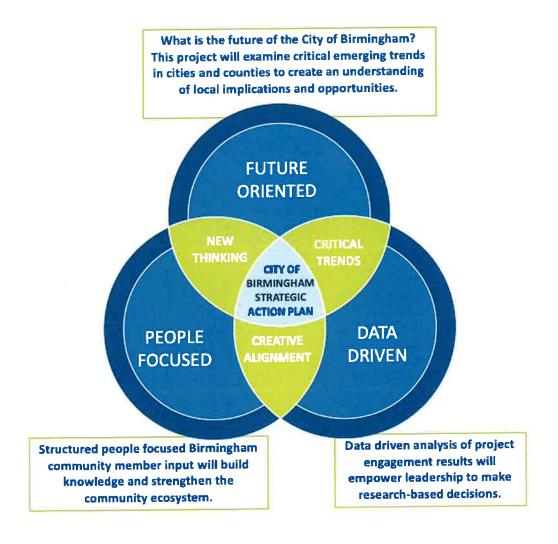


- Initial planning, meetings and schedule
- Engagement and communications plan
- Online project page and portal
- Orientation/briefing sessions on goals of the project and potential outcomes
- Community Survey
- Data visualization on portal
- Birmingham Think-Tank Workshop
- Birmingham Think-Tank Report
- Community engagement visioning sessions
- Vision Survey, data collection and analysis
- Data visualization on portal
- Focus Groups to develop strategic pillars, action areas, and implementation measures
- Future Summit
- Draft and finalize Birmingham Strategic Action Plan Report
- Presentation of Birmingham Strategic Action
 Plan Report

3.2 Proposed Methodology

Future iQ brings a global perspective to visioning and strategic planning that is invaluable to local interests. For the City of Birmingham, this means access to a wealth of knowledge and experience in the development of visioning and strategic planning for cities, counties, regions, nonprofits, and global corporations. Future iQ will use this experience to guide and inform this project and will work with Birmingham leadership to develop comprehensive, future-oriented, sustainable, and implementable recommendations and goals to support the new Birmingham Strategic Action Plan. These actions will balance priorities across the important dimensions specific to Birmingham and incorporate global and local best practices.

Future iQ's strategic planning methodology is based on three primary principles. It is Future Oriented, Data Driven and People Focused. The 'future orientation' is particularly important to take account of rapidly emerging technological trends. The 'data driven' ensures the plan is built on solid research and information. The 'people focused' is important to build support for the vision and goals for the city, and to harness the best possible input into the action plan formulation.



3.2.1 Future Oriented Research

Future iQ produces global foresight publications and research to help our clients build understanding about important future trends impacting cities, regions, communities, and industries. This insight helps community members to effectively plan for the future. During this project, we will draw on our research to present customized trend analysis and information most relevant to the City of Birmingham. This will help community stakeholders explore new thinking and ideas, and critically examine emerging challenges and opportunities.



Cities of the Future (2015)
Explores trends that have the potential for widespread adoption

over the next two decades.



Future of Tourism (2018)
Explores emerging trends
impacting outdoor and recreation
-based tourism industries.



in Illinois (2022)

Analyzes and explores how to grow, build and plan for the vital manufacturing sector in Illinois.

The Future of Manufacturing



The Next Industrial
Revolution (2018)

Explores the broad implications and impacts of an emerging world of accelerating digital technology, robotics and automation.



Future of Midwest Agriculture (2017)

Explores future trends and plausible scenarios for Midwest agricultural industries, economies and communities. Key trends include technological disruption, emergence of global forces and the importance of sustainability.



Global Consultations – Windsor Castle (2012 and 2018)

In partnership with St. George's house, Windsor Castle, Future iQ explored the challenges of building sustainable communities (2012) and explored the future of urban living (2018).



The Future of Food (2016)

Examines a range of critical catalysts of change relating to the global food supply chain, and the potential impact upon human health, the environment and food security.



Future of Manufacturing (2016)

Analyzes and provides insights on the key trends that are impacting the global manufacturing sector.

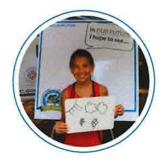
3.2.2 People Focused Engagement

Future iQ's people-focused engagement process facilitates real conversations that get to the heart of the matter and builds consensus. From large-scale participatory industry forums to targeted in-person and online focus groups and survey mechanisms, our wide range of engagement methods encourage people to be part of the decision-making and planning process. This hands-on engagement will be a very important feature of the proposed engagement aspects of this project.



Think-Tank – Scenario Planning

The Think-Tank is an innovative approach to stakeholder engagement. It focuses on scenario-based strategic planning and stresses the role of future-thinking to identify shared interests and common concerns.



Community and Stakeholder Outreach

Throughout the planning process Future iQ engages a broad cross section of stakeholder cohorts using meaningful and inclusive engagement methods.



Large Scale
Stakeholder Sessions

Large scale groups build momentum and community stakeholder enthusiasm for the planning process.



Focus Groups and Planning Workshops

Targeted in person and virtual focus group sessions and customized vision workshops deliver invaluable qualitative and quantitative stakeholder engagement insights.



Simulation Learning Future Game®

The Future Game is a planning simulation tool provides stakeholders with a dynamic gaming experience rewarding collaboration, innovation, and teamwork.

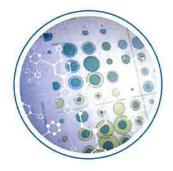


Student Sessions
The Youth Voice

Individual classroom and large group visioning sessions empower the youth voice in future planning for communities.

3.2.3 Data Driven Methodology

Future iQ specializes in sophisticated data collection and analysis. Using our innovative Future iQ <u>Lab Portal</u>, survey data collected from a wide range of cohorts will be presented in a way that allows Birmingham community stakeholders to see how their personal input helps shape the overall planning for the city.



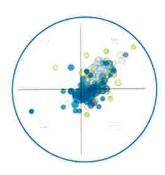
Stakeholder Surveys

Comprehensive stakeholder data, presented in a transparent and interactive manner, can help build rapid alignment around key points of consensus. This enables organizational leadership to make decisions and planning actions that are defensible and supported by the voices of all stakeholders.



Best Practices Benchmarking

Multi-dimensional benchmark studies and analyses of cohort communities provide valuable insight to clients.



Data Visualization

Survey results will be collected and presented in an innovative and interactive data visualization platform. This will allow stakeholders to examine the data collected from surveys themselves, explore levels of alignment or divergence around key topics, and selectively filter to view perspectives from their own sector, or other profile category.



Lab Portal

A customized Lab Portal gives clients a centralized location for project information, engagement dates, reports, and survey result data visualization.



Data Insights

Key data insights and analysis throughout the visioning process provide clients a glimpse into community sentiment and priorities.



Future Insight

Future insight and trend analysis during strategy development give clients the opportunity to consider the impacts and implications of future trends on current local planning.

4.0 Demonstrated Interest in and Understanding of the Project

This Future iQ Team has extensive experience in visioning and strategic planning projects, and we are excited to work with Birmingham community members to create a vision and action plan that is inclusive and sets the city on a path of resiliency and sustainability. We use a well-tested methodological approach that serves as the foundation for all of our projects, and each project is customized to meet the needs of the communities we work with. This project team will work closely with city leadership to design a planning process that adheres to the city's vision, mission, and goals, and provides pathways to success and prosperity for all community members.

4.1 Phase 1: Initial Planning and Project Set-Up

This project will begin with meetings between Future iQ team members and City leadership to establish a final **project plan** and schedule specifying the number and type of planned meetings, engagement activities and deliverables to occur throughout the project. Significant background research and exploration of existing city documents will be undertaken to understand those strategic directions already established and to identify progress made towards meeting those objectives.

The initial planning and project set-up invites participation, creates anticipation, and sets the tone for the visioning process.

During Phase 1, Future iQ will establish a <u>project page</u> on our website as well as <u>a project portal</u>. The project portal serves as a central location where community members can go to find updated project information, participate in discussion boards, take surveys, view survey results and data visualization, reports and notices. The portal is a piece of the **engagement and communications plan** for the project that will include marketing and other methods of publicity necessary to increase recognition, build credibility and deepen understanding of the strategic planning process, its objectives and outcomes within the community. Communications will involve both digital and traditional methods to include as broad an audience as possible.

As requested in the RFP, Future iQ will also facilitate **orientation and briefing sessions** for the City Commission and employees at all levels to educate them on the goals of the project and the potential outcomes. This step will be an important piece in aligning city departments around the importance of the visioning and strategic planning process.

Deliverables from Phase 1 will include:

- Initial planning and project schedule
- Engagement and communications plan
- Online project page and portal
- Orientation/briefing sessions on goals of the project and potential outcomes

4.2 Phase 2: Future Scenario Speculation

Future iQ will begin Phase 2 with a **Community Survey** that explores community sentiment and assesses appetite for change and future readiness. The results of the Community Survey will be posted on the project portal using **data visualization** (described Section 6.0).

Future iQ specializes in studying and understanding larger emergent trends and influences that are re-shaping cities, communities, industries, organizations, and regions. This future-

Birmingham scenario development will allow stakeholders to examine the implications of choices about future direction.

oriented lens guides phase two as it creates the building blocks of the visioning framework for Birmingham's future using a scenario-based planning methodology. Using trend research, industry analysis, and expectations about city development drivers, this methodology will enable community members to explore the impacts and consequences of a range of different future paths as they participate in the **Birmingham Future Think-Tank**.

The scenario-planning process creates scenarios that are not predictions but are a way of exploring plausible futures. Key aspects and features of the approach include:

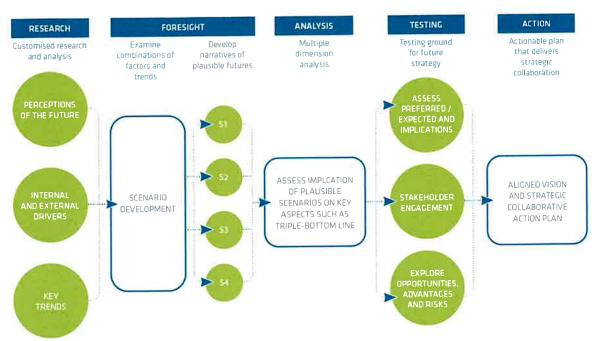
- It is customizable and built around the project plan.
- It is data and evidence-based, ensuring a robust outcome, and a vision and plan that deals with reality, rather than a 'wish-list.'
- Community engagement is front and center in the design, and stakeholders will have the option to have input via multiple methods.
- The process is inclusive, easily scalable and can draw input from all segments of Birmingham.

There are several important design principles to the proposed visioning approach, including:

- Strong collaborative and inclusive people-focused approach. The long-term success of this project will be dependent on building strong collaboration among the city's various stakeholders. The development of this type of 'eco-system' needs to be built in upfront in the planning stages of the project with a conscious effort to build on points of consensus to create a common vision for Birmingham.
- Future oriented. Building a city-wide shared vision will be critical for Birmingham. In order to develop an agreed-upon vision, community members will need clarity and a common understanding of the drivers impacting the city.
- Data driven approach, including data visualization. Our experience suggests that
 projects like this are most successful when built on transparent data-driven approaches,
 inclusive of as many community members as possible.

 Project management and communication strategy. Building the systems and communication methods to ensure compliance and timely delivery are important features of our project management.

Below is the visual outline of how Future iQ's scenario-based visioning and strategic planning process works.



How a Think-Tank Works

The Think-Tank process helps to define a broad vision, focus areas, and directions. It is usually conducted as a highly participatory 6 to 8-hour workshop (held over two days or evenings) that produces a preferred future scenario validated by the completion of individual participant 'Heat Maps'. The Heat Map results are incorporated into the visioning process, revealing consensus on a preferred future or vision. It is assumed that the

The Think-Tank provides an important opportunity for Birmingham's stakeholders to take a 'deep dive' into the future.

Think-Tank will be an in-person workshop. Given the unpredictability of COVID-19, the project team will work closely with city staff and Community Task Force to design a Think-Tank that will work best for Birmingham.

The scenario based Future Think-Tank is a tool to gain better understanding of community priorities and goals to create effective actions for program and resource allocation. This process will help local community members explore and understand emergent trends, and their potential implications across the city. A range of plausible future scenarios are developed that act as a testing ground to assess resilience and consequences.

For Birmingham, we believe this process is trying to answer important questions such as:

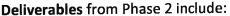
- What should Birmingham become?
- What makes Birmingham unique and special and how can the city use these characteristics to prepare for the future?
- How will community member preferences fit into this vision?
- How will the evolving demographics of the city be incorporated into the new vision?
- How should funds be invested and leveraged to build resiliency for the city?

In addition, the Think-Tank process can further examine circumstances including:

- How does the city fit into the larger regional community?
- What are the specific strategic gap and growth areas for Birmingham and does previous planning address those areas?
- How may financial/budgetary issues on the state level impact Birmingham and how can the region prepare for potential budget challenges?
- Where does Birmingham fit into the world, and what are its unique competitive strengths?
- How does Birmingham anticipate and take advantage of emerging trends in the economy, country, and aspirations of community members?
- What unique hurdles might Birmingham face, and how do we build collaborative approaches and structures to ensure continued successful programs and services?
- Where is there opportunity or need to evolve or change? Where is there an appetite for change, and where might there be resistance to change?
- What is the story Birmingham community members want to tell about themselves and what do they want the city to be in the future?

The methodology being proposed is more in-depth than a SWOT analysis and will allow community stakeholders to tackle these questions in an engaging and thought-provoking manner. This will then lead to the clarification of potential key strategic pillars that support the Birmingham Strategic Action Plan. Results from the Think-Tank will be compiled in the Birmingham Think-Tank Report.





- Community survey
- Data visualization on project portal
- Birmingham Think-Tank Workshop
- Birmingham Think-Tank Report





4.3 Phase 3: Broad Community Engagement

Engagement is a cornerstone of Future iQ's visioning and strategic planning methodology. Key to effective community engagement is building momentum and excitement around the vision as it is created. Future iQ will use a wide variety of engagement methods to build this momentum – from the Think-Tank, to visioning sessions, discussion board topics, and surveys that reach all corners of the community. The team will go deep and wide to gather input and strive to reach those who don't usually participate in the public process.

Broad community engagement allows community members to add their voices to the visioning process.

To reach as many community members as possible, Future iQ will conduct this project in both in-person and virtual formats. We are assuming the larger engagement sessions such as the Think-Tank will be in person. This past year during the pandemic, we found that a hybrid of virtual and in-person for focus groups and interviews to be very successful. This hybrid model has proven to be more efficient and allows for increased participation in many instances. Some of the effective virtual engagement tools we have developed include:

- Virtual workshops, interviews, focus groups and Task Force meetings
- Rapid polling (using engagement tool, Poll Everywhere)
- Discussion boards
- Online surveys with data visualization (Spanish version surveys available)
- 'Digital assignments' for community members

Following the Think-Tank, the Team will seek to engage the public on a city-wide basis. A **Vision Survey** will be administered concurrently with the **community vision engagement sessions** to seek input from community stakeholders on the preferred vision that emerged from the Think-Tank process and to begin to set key strategic focus areas for community. The scope and various means of this engagement will be developed in close consultation with city leadership at the start of the project. Groups included in the engagement phase include stakeholders such as:

- Community, recreation, and sporting groups
- Business and industry groups
- University students
- Elected officials
- Open community meetings
- Homeowners' associations
- Youth and high school sessions

To broaden the reach of community engagement, online **Discussion Boards** will be created and administered on the project portal to encourage community discussion and feedback on specific issues and topics that arise from the Vision Survey and visioning sessions.

Sample online Discussion Board Tab on Project Portal



Phase 3 also involves the facilitation of specific **focus groups** around each strategic pillar identified at the Think-Tank and developed at the engagement sessions. The sessions last $1-1\,\%$ hours and serve to build the specific steps of the action areas and implementation metrics that will put the community on the path to its preferred future. The focus groups may be held inperson or virtually as needed.

Following the community engagement sessions and focus groups, Future iQ will convene a **Future Summit**. This group will revisit the Think-Tank and incorporate the results from the expanded engagement to validate the engagement results and develop the key strategic focus areas for the city. The Future Summit serves to foster cohesion and alignment by giving participants the opportunity to validate the final vision and strategic direction for the community. This support will be very important to facilitate resource and city-wide alignment in preparation for the upcoming comprehensive planning process.

Deliverables for Phase 3 include:

- Community vision engagement sessions
- Vision Survey, data collection and analysis
- Discussion Boards
- Focus Groups to develop strategic pillars, action areas, and implementation metrics
- Future Summit

4.4 Phase 4: Final Report

At this point, Future iQ will draw together all information to craft the planning framework for the Birmingham. This will involve careful synthesis of all research, engagement results, reports, and analysis into a first draft of the Birmingham Strategic Action Plan Report. The project team's final steps in the visioning process incorporates the accumulated input on the draft framework from elected officials, community stakeholders and city leadership. The project team will use this opportunity to work with city leadership to plan for sustainability by developing realistic, implementable key strategic action areas that are measurable. The final Birmingham Strategic Action Plan Report will be presented by the Project Director as determined at the initial planning meetings.

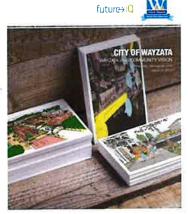
Measuring Effectiveness

Understanding and measuring progress in the key strategic action areas will be an important part of implementing Birmingham's community vision. Used correctly, metrics provide a powerful feedback loop to understanding the effectiveness of resource development strategies, investment in programs, and in identifying emerging gaps. In developing metrics, it is important to measure progress over time. By comparing progress of the strategic action areas at different points in time, the metrics will give an indication of the trajectory of that item. Phase 4 of this project plan includes the development of measurements to support periodic review and adjustment of the city's strategic vision over time.

Deliverables for Phase 4 include:

- Draft and finalize Birmingham Strategic Action Plan Report
- Presentation of the Birmingham Strategic Action Plan Report







5.0 References

Below are recent similar project contacts that may be used as references for this project. All are aware that they may be contacted as references for Future iQ. Additional references may be provided as needed.

Smithville, Missouri Vision and Strategic Action Plan, (2019); Smithville Comprehensive Plan (2019- 2020); Smithville Parks & Recreation Master Plan (2020-2021); Smithville Transportation Master Plan Project (2021-2022)	Cynthia Wagner City Administrator City of Smithville Smithville, MO 64089 Tel: 816-532-3897 Email: cwagner@smithvillemo.org
Coppell, Texas Coppell Vision 2040 and Strategic Plan (2018-2019)	Traci E. Leach Deputy City Manager Tel: 972-304-3672 Email: TLeach@coppelltx.gov
Park City, Utah Vision and Action Plan (2019-2021)	Andy Beerman, Former Mayor Park City Municipal Corporation Tel: 435-731-8366 Email: Atbeerman@gmail.com
City of Trotwood, Ohio <u>Organizational Strategic</u> <u>Plan</u> (2019)	Quincy Pope, City Manager City of Trotwood Trotwood, OH 45426 Tel: 937-854-7215 Email: QPope@trotwood.org
Town of Falmouth, Maine <u>Vision and Values</u> (2020-2022)	Theo Holtwijk. Director of Long Range Planning and Economic Development Town of Falmouth Falmouth, ME 04105 Tel: 207-841-5060 Email: tholtwijk@falmouthme.org
Edina, Minnesota <u>Vision Edina</u> (2014-2015); <u>Nodes and Modes</u> (2017)	Scott Neal, City Manager City of Edina, MN 55424 Tel: 952-826-0401 Email: sneal@edinamn.gov

6.0 Communication and Public Interaction

Communications and public interaction are integral parts of Future iQ's visioning and strategic planning methodology. Our communications involve both digital and traditional methods to include as broad an audience as possible. Future iQ will also work closely with city staff to maintain regular communications for the duration of the project. Our practice is to facilitate weekly conference calls with the city's client contact throughout the project. It is our firm belief that consistent and easily accessible project communications add to the transparency of the process and encourage active participation.

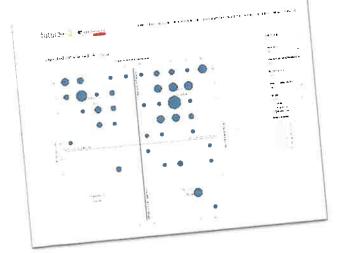
At the beginning of the project, Future iQ will establish a social media and council presentation schedule for the duration of the project. The social media schedule will be updated on a weekly basis for the project call. Future iQ will also supply newsletter articles for any city publication that goes out to community members, and press releases as needed.

A key part of Future iQ's engagement and communications are distributed through the project portal created for every project. The **project portal** serves as a central location where community members can go to find updated project information, participate in discussion boards, take surveys, view survey results and data visualization, reports, and notices. For examples, please see http://lab.future-iq.com. The portal will provide a fun and interactive way to give transparent feedback to participants while at the same time exploring issues and views across Birmingham's community ecosystem.

The project portal provides a people-focused, data-driven approach to visioning, planning and key issue analysis. The image below shows an example of the 'point of consensus' in a sample project. The dots represent groups of community members and where their preferred future was located relative to a range of choices within the scenario matrix. The point of consensus will move depending on the search filters selected, allowing for an engaging and interesting way to explore the various views of different cohorts and groups within the community. For Birmingham, we would set filters based on profile questions such as age, length of time living or working in the city, neighborhood

affiliation, etc.

Sample data visualization of survey responses



7.0 Ability to Work Within the Desired Timetable

The following chart outlines key tasks and suggested periods of activities. This timeline reflects the relative emphasis of activity. Work on a number of the key deliverables will occur in parallel to allow the phases to be completed within this project timeline. Please note that this schedule is flexible, given these challenging times with the impacts of COVID-19. Future iQ will work with the City of Birmingham to create a timeline that incorporates the specific needs of the city and remains flexible over the course of the project.

Key Phases	Key Deliverables	м	J	J	Α	s	0	N	D	J
Phase 1:	Initial planning and schedule									
Initial Planning	Engagement and communications plan									
and Project Set-Up	Online project page and portal									
	Orientation/briefing sessions on goals of the project and potential outcomes									
Phase 2:	Community survey									
Future Scenario	Data visualization on portal									
Speculation	Birmingham Think-Tank Workshop									
	Birmingham Think-Tank Report			To						
Phase 3:	Community vision engagement sessions									
Broad Community	Vision Survey, data collection and analysis									
Engagement	Discussion Boards									
	Focus Groups to develop strategic pillars, action areas, and implementation measures									
	Future Summit									
Phase 4: Final Report	Draft and Finalize Birmingham Strategic Action Plan Report									
·	Presentation of the Birmingham Strategic Action Plan Report									1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1

8.0 Compensation

Future iQ operates on a fixed-price delivery. The fees below include all travel, accommodation costs and overheads for the Project Director and staff. We assume that Birmingham will provide the venues for the Think-Tank, visioning sessions, Focus Groups, Future Summit, and other project meetings. Please note that the project costs and plan are flexible and easily scalable depending on the needs of Birmingham.

Key Phases	Phases Key Components	
Phase 1:	Initial planning and schedule	\$1,000
Initial Planning	Engagement and communications plan	\$2,000
and Project	Online project page and portal	\$4,000
Set-Up	Orientation/briefing sessions on goals of the project	
	and potential outcomes	\$4,000
Phase 2:	Community survey	\$4,000
Future	Data visualization on portal	\$4,000
Scenario	Birmingham Think-Tank Workshop	\$10,000
Speculation	Birmingham Think-Tank Report	\$5,000
Phase 3:	Community vision engagement sessions	\$10,000
Broad	Vision Survey, data collection and analysis	
Community	Discussion Boards	\$3,000
Engagement	Focus Groups to develop strategic pillars, action	
	areas, and implementation measures	\$16,000
	Future Summit	\$3,000
Phase 4:	Draft and finalize Birmingham Strategic Action Plan	
Final Report	Report	\$10,000
	Presentation of Birmingham Strategic Action Plan	
	Report	\$2,000
Total	FIXED PRICE PROPOSAL	\$78,000

Proposed payment schedule:

- 25% on signing of contract
- 25% at completion of phases 2, 3 and 4

Appendix A: Team Resumes 9.0

Project Director, David Beurle, CEO, Future iQ 9.1

RÉSUMÉ



DAVID BEURLE

david@future-iq.com

EDUCATION

Bachelor Degree in Agricultural Science, University of Sydney, 1984

EMPLOYMENT

Founder and CEO Future iQ, USA and Europe, 2003 - Present

Principal Adviser, Minister for Primary Industries, Western Australia, 1991 - 2000

Rangeland Scientist, Western Australian Department of Agriculture, 1985-1991

PHILANTHROPIC WORK

Board Director, Western Australian Community Foundation, 2003-2005

Founding member, Plant-Based Product Council, USA, 2019

David Beurle is a world renowned strategist, futurist, researcher and practitioner. As founder and CEO of Future iQ, David is a pioneer and expert in creating new and innovative future planning approaches for use in community, regional, industry, organizational and government settings. David has pioneered the application of scenario planning within regions, industry and corporations around the world. David created the Future Game", a global planning and workshop tool that has been used in over 600 workshops across 10 countries. As CEO of Future iQ, David has led global projects across 4 continents and has written a number of foresight papers https://future-iq.com/foresight-research/.

Having worked in the field of organizational and regional economic and community planning for over 20 years, his work has won numerous awards. David has the major role in all of Future iQ's projects as lead project manager. More details on David's work can be seen at www.davidbeurle.com

RECENT PROJECT EXPERIENCE

DAVID BEURLE, B.SC. AGR

C E O FUTURE IO

- Envision Bemidji 2030, MN, 2020-Present
- City of Smithville Comprehensive Plan, MO, 2020
- New England Regional Defense Industry Collaboration, New England, 2019-2020
- Future of Local Food Systems & Sustainable Agriculture, IL, 2019-2020
- Park City Community Vision and Strategic Action Plan, UT. 2019-2020
- NOHOA Community Survey 2019-2020
- Clearwater Economic Development Association, ID, 2019
- City of Trotwood Organizational Strategic Plan, OH, 2019
- City of Mitchell Community Vision and Action Plan, SD, 2019
- ECC Medical/Well-Being Strategic Marketing Plan and Economic Development Plan, MN, 2016-2019
- Sustainable Materials Management Vision for Iowa, IDNR, IA, 2018-2019
- Tillamook County Strategic Vision and Action Plan, Oregan, 2018-2019
- National Association of Development Organizations, Washington, D.C., 2018-2019 Future of Urban Living Think Tank, St Georges House,
- Windsor Castle, UK, 2018-2019
- Middle Georgia Regional Defense Industry Economic Diversification Project 2017-2018
- City of Coppell, TX, Community Visioning 2018-2019
- Maine Woods, Tourism Impact Study 2017-2018
- City of San Diego Defense Industry Economic Development Plan. California, U.S., 2016-2018

- North Coast, Oregon, Tourism Destination Management, 2018-2019
- Waseca Vision 2030, MN, 2017-2018
- New Hampshire Aerospace and Defense Consortium, Strategic Action Plan, 2017-2018
- Hilton Head Island, South Carolina, Community Visioning Project, 2016-2017
- Scott County, MN, Visioning and Scenario Planning, 2017
- University of MN, Future of Midwest Agriculture, 2016-2017
- Task Force LIMA Defense Initiative, Ohio, US, 2015-2017
- National Congress of American Indians, Future Game development, 2016-2018
- City of Wayzata, Minnesota, US, Community Visioning 2017-2018
- Moosehead Lake Regional Master Plan, Maine, US, 2016-2017
- Columbia River Gorge, Oregon, US, 2015-2016
- Griffith Foods Scenario Planning Chicago, US, 2016
- Mediterranean PORTS EU Projects Italy/France, 2015
- Vadinia Project, Leon, Northern Spain, 2014
- Agriparco Montespertoli, Tuscany, Italy, 2014
- Govt. of Alberta Small Business Strategy, Canada, 2013
- Mount Pierre Project, Australia, 2013
- Kewaunee Economic Adjustment Project, WI, US, 2013
- Future West Cork, Ireland, 2009-2012

RECENT PUBLICATIONS

- The Holding Space: A Guide for Partners in Tribal Research, 2020
- The Future of Urban Living, 2019
- Future of Tourism, 2018
- The Next Industrial Revolution, 2018
- The Future of Midwest Agriculture, 2017-2018
- The Future of Manufacturing, 2016
- The Future of Food, 2016
- Economics of Collaboration, 2015
- Citles of the Future, 2015

RECENT KEYNOTE PRESENTATIONS

- Ohio Food Summit, Ohio, USA (March 2020)
- Greater Mankato Annual Summit, Minnesota, USA (March 2020)
- New North Regional Summit, Wisconsin, USA (December 2019)
- New Hampshire PTAC Conference, NH, USA (December 2019)
- Park City Vision 2020 Future Summit, Utah, USA (November 2019)
- Institute of Directors (IoD) Annual Conference, Gleneagles, Scotland (October 2019)
- E.P.I.R.C Manufacturing Conference, PA, USA (October 2019)
- City of Smithville Youth, Missouri, USA (September 2019)

- E,P Manufacturing National Network Summit, Georgia, USA
- (September 2019) AgFutures 2035 Conference, Perth, Australia (August 2019)
- Forward 2040 Youth, South Dakota (April 2019)
- E.E.R Bloomington, Eden Prairle, Edina & Richfield Chambers of Commerce Conference, Minneapolis, USA
- Agricultural Symposium keynote, Emmetsburg, Iowa, USA (March 2019)
- Wisconsin Integrated Resource Management Conference, Stevens Point, Wisconsin, USA (February 2019)
- The Future of Urban Living Consultation, St George's House, Windsor Castle, UK (December 2018)



9.2 Heather Branigin, Vice President, Foresight Research

RÉSUMÉ



EDUCATION

Master of Arts in Teaching Secondary Level, Social Studies University of St. Thomas, MN

Bachelor of Arts in Political Science/ International Relations Advanced Language Certificate: French Literature Carleton College, MN

Honours Degree, Neuchâtel Jr. College Neuchâtel, Switzerland

EMPLOYMENT

Vice President, Foresight Research, Future IQ, 2016-present

City of Edina, MN, 2013-2016

NCCA - National Model United Nations Minneapolis, MN, 2010-2013

UNA-MN, St. Paul, MN, 2007-2010

PHILANTHROPIC WORK

Bd. Member and Secretary, Caring for Cats, 2019-present

Vol Judge, Future City Comp., 2017

Adv. Council Member, UNA-MN 2014-present

Co-President (2011-2013), Bd. Member (2010, 2014) UNA-MN



HEATHER BRANIGIN, B.A., M.A.T.

VICE PRESIDENT, FORESIGHT RESEARCH

Heather leads Future iQ's research projects, most recently co-authoring *The Future of Local Food Systems and Sustainable Agriculture* and *The Future of Urban Living*. She has extensive experience in local government and the nonprofit sector and is an accomplished project manager. Heather has a well-developed ability to assimilate information into thoughtful and coherent writing. She applies the integration of future trends, data analysis and public engagement into implementable strategy development for clients. Through her work, Heather provides that critical resourceful guidance needed to empower communities and organizations to make decisions that build sustainability and resiliency as they face a future of accelerations and change. Originally from Canada, Heather has pursued her international interests through her philanthropic work with the United Nations Association of Minnesota.

RECENT PROJECT EXPERIENCE

- Smithville 2030 Comprehensive Plan, MO, 2019-Present
- Envision Bemidji 2030, MN, 2019-Present
- NOHOA Community Survey, MN, 2018-2019
- Kinship Fellows and Food:Land:Opportunity Grantees Summit, Chicago, IL, 2019-2020
- City of Trotwood Organizational Strategic Plan, OH, 2019
- New North Business Intelligence Strategic Action Plan, WI, 2019
- New England Collaborative, DoD-OEA, 2019
- City of Mitchell Community Vision and Action Plan, SD, 2019
- Future of Urban Living Global Consultation at Windsor Castle, UK, 2018
- ECEDA, ID. 2019
- Sustainable Materials Management Vision for Iowa, Iowa DNR, 2018-2019
- Tillamook County Strategic Vision and Action Plan, OR, 2018-2019
- ECC Medical/Well-Being Strategic Marketing Plan and Econ Dev Plan, MN, 2016-2019
- NADO, Washington, D.C., 2018-2019

- Coppell Vision 2040, Coppell, TX, 2018-2019
- City of San Diego, OEA Grant Facilitation, San Diego, CA, 2016-2019
- Snohomish County Regional Tourism Destination Development, WA, 2018
- McHenry County College, Crystal Lake, IL, 2018
- RCAP, Washington, D.C., 2018
- Wayzata Community Vision, MN, 2017-2018
- NHADEC, NH, 2017-2018
- Waseca Vision 2030, MN, 2017-2018
- Edina Nodes and Modes Bridging Sessions, Edina, MN 2017
- Scott County Visioning and Scenario Planning, MN, 2017
- CAP-HC Vision and Strategic Action Plan, St. Louis Park, MN 2017
- Task Force LIMA Defense Initiative, Allen County, OH, 2016-2017
- University of Minnesota, Future of Midwest Agriculture, MN, 2016-2017
- Town of Hilton Head Island Vision and Strategic Action Plan, SC, 2016-2017
- City of Edina, Vision Edina, MN, 2014-2015

RELEVANT PUBLICATIONS

- Kinship Fdn Future of Local Food Systems
 Sustainable Agriculture, 2020
- NOHOA Community Survey Report, 2020
- New North Business Intelligence Reports, 2019
- Propel San Diego Strategic Roadmap Undate, 2019
- Mitchell Strategic Action Plan, 2019
- IDNR Strategic Vision for Iowa, 2019
- Trotwood Organizational Strategic Plan, 2019
- New England Collaborative Think-Tank Report, 2019
- NADO Strategic Action Plan, 2019
- Edina Med/Wellbeing Dest Marketing Strategic Plan, 2019
- CEDA Think-Tank Report, 2019

- Tillamook Co Think-Tank Report 2019
- The Future of Urban Living, 2019
- Coppell Vision 2040 Strategic Plan, 2019
- The Future of Tourism, 2018
- McHenry Co College Strategic Foresight Session, 2018
- The Next Industrial Revolution, 2018
- Waseca Vision 2030 Strategic Plan, 2018
- NHADEC Strategic Action Plan, 2018
- Snohomish Co Tourism Reports, 2018
- Scott County Planning Reports, 2017
- Propel San Diego Think-Tank Report, 2017
 Edina Chamber Econ Dev Strategy, 2017
- Innovation Framework for Greater Lima Region, 2016
- The Future of Food, 2016

HEATHER BRANIGIN

heather@future-iq.com

9.3 Celine Beurle, COO

RÉSUMÉ



CELINE BEURLE

celine@future-iq.com

EDUCATION

Masters Degree in Sociology University College Cork, 1998

B.A. Hons Degree in Sociology/Philosophy University College Cork, 1996

B.A. Hons Degree Sociology University of Warwick, 1995

EMPLOYMENT

C.O.O. Future iQ USA and Europe, 2012 – Present

Managing Director Future iQ Europe, Ltd Europe, 2012 - Present

Manager, Govt. Employment Service Ireland, 2003 – 2012

Animal Welfare Policy Chair Green Party Ireland, 2003 – 2009



CELINE BEURLE, B.A., M.A.

COO FUTURE 10

Celine is Chief Operating Officer of Future iQ and Managing Director of Future iQ Europe. Within her role within the company since 2012, she has also been responsible for global expansion, expanding the geographical reach of the company to encompass South America, Italy, Spain and the UK so far. With an academic background in Sociology and Philosophy, Celine is passionate about understanding society and this has led to her ongoing interest in pursuing societal change, which has enabled Future iQ to view projects through the often needed 'sociological' lens. As COO, Celine also works with the CEO on the strategic direction of the company and communications within the company. One part of her many roles is that of project management of many global projects. She also works on projects as the direct lead person regarding communications and marketing/branding. Celine has an innate ability to produce a coherent communications and branding element to any Future iQ project.

RECENT PROJECT EXPERIENCE

- New England Regional Defense Industry Collaboration, New England, 2019-2020
- Park City Vision 2020, Utah, 2019-2020
- City of Smithville Strategic Planning, Missouri, 2019
- Tillamook County Strategic Planning, Oregon, USA, 2019
- The Future of Urban Living consultation, Windsor Castle, UK, 2018
- Middle Georgia Charrette and Regional Planning Initiative, Georgia, USA, 2018
- Coppell Vision 2040, Texas, USA, 2018
- Hilton Head Island Visioning, South Carolina, US, 2017
- La Laguna Regional Planning, Tenerife, Spain, 2017
- Greater Lima Region, Ohio, US 2016-2017
- Griffith Foods Planning Project, Chicago, US, 2016

- Task Force LIMA Defense Initiative Ohio, US, 2015 – 2017
- Edina Economic Development Plan Minnesota, US, 2016
- Oregon Regional Tourism Planning, US, 2015-2016
- Columbia River Gorge, Oregon, US, 2015-2016
- Griffith Foods Scenario Planning Chicago, US, 2016
- Mediterranean PORTS EU Projects Italy/France, 2015
- Fox Valley Defense Industry Adjustment, Wisconsin, US, 2014-2015
- Vision Edina, Minneapolis, US, 2014- 2015
- Australian Grain Research and Development Corporation, Western Australia, 2008-2015
- Vadinia Project, Leon, Northern Spain, 2014
- Agriparco Montespertoli, Tuscany, Italy, 2014
- Govt. of Alberta Small Business Strategy Canada, 2013
- Global Think Tank, Windsor Castle, UK, 2012

RELEVANT PUBLICATIONS

- · Park City Vision 2020 Think-Tank Report, 2019
- The Next Industrial Revolution, FiQ Foresight Report, 2018
- Vision 2040 Community Engagement Report, 2018
- Middle Georgia Charette and Regional Planning Stakeholder Engagement Report, 2018
- Hilton Head Island Our Future Think Tank Report, 2018
- Hilton Head Island Our Future Stakeholder Engagement Report, 2018
- Vision 2040 Think Tank Report, 2018
- Middle Georgia Charette and Regional Planning Think Tank Report, 2018
- The Next Industrial Revolution, 2017

- Future iQ Project Communication Plan
 Framework and Approach, 2017
- Greater Lima Region Stakeholder Ecosystem Analysis, 2017
- Economic Development in Edina Stakeholder Analysis, 2017
- Griffith Foods Stakeholder Analysis Report, 2017
- An Exploration of Focus Group Methodology, 2016
- The Future of Food, 2016
- Grains Industry Network Mapping Report, 2015
- Agriparco Monterspertoli Scenario Planning Report, 2014
- Green Party Animal Welfare Policy and Research Paper, 2009

9.4 Tobiloba Adaramati, Data Analyst

RÉSUMÉ



EDUCATION

B,Tech. (First Class) Degree in Mathematics Education Federal University of Technology, Minna, 2015 N.C.E Degree in Computer and Mathematics Federal College of Education

EMPLOYMENT

(Technical), Akoka, 2011

Data Analyst. Future iQ
USA and Europe, 2017 – Present
Results Measurement Expert, JMSF
Agribusiness, Nigeria, 2018 – Present
CEO. Growth Analytics Consulting
Nigeria, 2017 – Present
Monitoring and Evaluation Analyst,
Solina Group, Nigeria, 2016 – 2017
Research Analyst, Solina
Group Nigeria, 2015 – 2016

TOBILOBA ADARAMATI, B. Tech. (Edu).

Data Analyst

Tobiloba Adaramati is a mathematician who sees the beauty in data. She is an expert in data processing, opinion mining, sentiment and reputation analysis. Through her unique perspective, Tobiloba sees each data point as a unique part of a puzzle which put together correctly, creates a clear picture. She uses various forms of data to provide valuable insights and reveal underlying trends. Her background includes a first-class degree in mathematics and experience providing monitoring and evaluation services for international development programs. Tobiloba has worked with Future iQ since 2017, providing data and analytics expertise.

RECENT PROJECT EXPERIENCE

- · Mitchell Benchmark Analysis Report, 2019
- Smithville Benchmark Analysis Report, 2019
- Edina Medical Cluster Analysis, 2019

RELEVANT PUBLICATIONS

- · Wayzata Benchmark Analysis Report, 2017
- Wayzata 2040, Sailing Ahead, Minnesota, US 2017
- Coppell Vision 2040 Project, Texas, US, 2018

TOBILOBA ADARAMATI

tobiloba@future-iq.com



9.5 Walter Paixao-Cortes, Data Engineer

RÉSUMÉ



EDUCATION

Doctorate in Computer Science (Bioinformatics/ Natural Language Processing) Pontifical Catholic University of Rio Grande do Sul, 2015 to present

Masters Degree in Computer Science (Bioinformatics) Pontifical Catholic University of Rio Grande do Sul 2013 - 2015

Bachelors Degree in Computer Science Pontifical Catholic University of Rio Grande do Sul. 1995 – 2002

EMPLOYMENT

Data Engineer – Future IQ (2017 – present) Senior Software Engineer – Dell Computers, Brazil (2000 – present)

Software Engineer – Accenture, Brazil (2003 – 2005)

WALTER R. PAIXÃO-CÔRTES, MA. BA

DATA ENGINEER, FUTURE 10

Walter is a senior software engineer with 24 years of experience in the software development industry, working across different domains including Human Resources, Finance and Product Engineering. He has expertise in data analysis, creating ETL pipelines, building data visualizations in many different technologies (SAP Business Objects, Oracle BI Enterprise Edition, QlikView and Tableau), and has experience in working with high data volumes to extract insights. Walter has an academic background in Computer Science with a Masters in Bioinformatics, and a Doctorate (in progress) in Bioinformatics with a minor in Natural Language Processing.

RECENT PROJECT EXPERIENCE

- Mitchell Forward 2040, South Dakota, 2019
- Park City Vision 2020, Utah, USA, 2019
- New England Regional Defense Industry Collaboration Initiative, USA, 2019-2020
- City of Smithville Visioning and Strategic Action Plan project, Missouri, USA, 2019
- Tillamook County Strategic Planning, Oregon, USA, 2019
- Snohomish County Regional Tourism Destination
 Development, WA. 2018

WALTER R. PAIXÃO-CÔRTES

walter@future-iq.com

- McHenry County College, Crystal Lake, IL. 2018
- Middle Georgia Charrette and Regional Planning, Georgia. 2018
- Coppell Vision 2040, Coppell, Texas. 2018
- Rural Community Assistance Partnership, Washington D.C. 2018
- Wayzata Community Vision, Wayzata, MN. 2017-2018
- Hilton Head Island Our Future, South Carolina. 2017-2018



A Proposal for Facilitation of the Strategic Planning Process

City of Birmingham, Michigan

City of Birmingham

M. 4 (3.)

City Manager's Office

Submitted by:

Lewis G. Bender, Ph.D.

P.O. Box 330

Leroy, MI 49655

(618) 792-6103-Cell lewbender@aol.com

www.lewbender.com

May 3, 2022

A Proposal for Facilitation of the Strategic Planning Process for the City of Birmingham

Purpose of a facilitated process

The purpose of this process is four-fold:

- 1. Assist the Mayor, Commissioners, City Manager, and the senior staff in establishing a strategic vision, goals, key objectives, and one-year tasks to be completed for the City of Birmingham.
- 2. Facilitate the discussion for updating the City's Mission and Value Statements.
- 3. Create a facilitated environment that allows participants to explore and discuss ideas in a task-oriented, fair, respectful, and balanced manner.
- 4. Present documentation that adequately reflects the major deliberations and decisions of the planning group.

Approach to strategic planning

The center of this proposed process is the view that effective strategic planning involves ongoing communication between and among elected and appointed municipal leaders toward shared goals. Strategic plans must be short working documents that are flexible to changes (challenges and opportunities) and used as part of the normal discussions between elected and appointed leaders.

This proposal also embraces the view that elected leaders, as representatives of the community, have the job of determining where (the goals) the community should go. Appointed leaders have the job of determining how to get there.

Tasks to be completed

The facilitator will complete the following tasks:

- 1. Consult with the Mayor, Manager, and involved persons regarding the process's specific purposes, schedules, and agenda.
- Facilitate meetings that permit the Mayor or Manager to be free from running the meetings and encourage the participants' positive and creative exchange of ideas.
- 3. Offer advice regarding processes and methodologies to the participants.
- 4. Move the process forward efficiently and effectively.
- 5. Provide an outline of the major points of all proceedings.
- 6. Provide a draft of the revised City Vision, Values, and Mission based on facilitated discussions with selected participants.
- 7. Provide a draft of the strategic plan to be finalized by the City Manager and staff and formally adopted by the City Commission

Proposed dates

The time frame for this proposed process will be determined through discussions with the City Manager and Birmingham leaders. Generally, it is suggested that the process commence in the summer months with the City Commission, City Manager, and staff. The suggested completion date should be at the end of September after input (early mid-September) is gathered from Birmingham residents. Summer is a very ineffective time for seeking public input.

Cost

The total cost for facilitation services involving pre-consultations, four days of on-site facilitation, and off-site research and preparation of meeting notes is \$14,500. This amount includes the reimbursement of lodging, meals, and expenses associated with travel from Luther, Michigan. Additional on-site visits will cost \$2,500 plus travel expenses per visit.

Proposed format:

It is recommended that the planning process utilize the following format: Times and topics are flexible to the needs of the participants.

Meeting One: Initial Commission Discussion (June) Mayor, City Commission Manager, a Senior Staf	 Review and finalize the strategic planning process. Review the state of the City and discuss major trends and changes.
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Meeting Two:	Morning and	Focus:		
Staff input. (June/July)	Afternoon Participants: City Staff in various meetings.	 Staff identifies Strengths and Weaknesses and Opportunities and Challenges facing the City Goals and Objectives that the Commission might consider. Input regarding the Mission and Values of the City. 		

Meeting Three: In-person resident input to the Commissioners (Early midSeptember)

6:00 - 8:30 PM Participants: City Residents, Business Owners and Community Leaders, Mayor, Commissioners, Manager, Department Heads, and identified Staff.

Focus:

- Commissioners gain public input related to challenges, opportunities, and achievable five-year goals from assembled groups of citizens.
- Commissioners will facilitate breakout sessions with assembled citizens. Department Heads and Staff will assist in the note-taking and providing information.
- Based on the experiences of other communities, it is recommended that this meeting be actively promoted and that a small meal is provided.
- Other community input processes such as Zoom discussions and surveys can also be discussed.

Meeting Four: Putting it together. (Mid to Late September)

Day, afternoon or evening (Approximately five to six hours) Participants: Mayor, Commissioners, Manager, and Department Heads.

Focus: Putting it all together.

- Review and discuss public input.
- Review and discuss staff input.
- Revisit relevant data
- Review Board Five Year Vision Tour
- Identify Top 3-5 Goal Areas
- Identify key objectives and guidelines for each goal area.
- Identify the one-year tasks to be completed in each goal area.
- Review and discuss drafts of the mission and values statements.
- Identify the next steps for moving forward.

Terms of the Agreement for Professional Strategic Planning Services

I have reviewed the terms outlined in the agreement, including the standard insurance requirements. I will be prepared to provide the required documentation within five days of the acceptance of the agreement if the proposal is awarded.

Facilitator

Dr. Lewis Bender will serve as the facilitator of this process. He has a long history of working with municipal and other local governments. He has conducted numerous strategic planning processes and has taught graduate-level classes on the subject.

He is Professor Emeritus of Public Administration at Southern Illinois University at Edwardsville (SIUE). He taught various classes in supervision and leadership for the Department of Public Administration and Policy Analysis.

Previously at SIUE, he was the Director of Regional Research and Development Services, responsible for the university community and public service outreach and applied research endeavors. Throughout his career, Professor Bender has been deeply involved in community-based applied research, organizational goal setting, planning, and organizational development approaches.

His educational background includes a BS in History from Grand Valley State University, Allendale, Michigan (1971); a Master's Degree in Political Science, Wayne State University, Detroit, Michigan (1973) and a Ph.D. in Political Science, University of Georgia, Athens, Georgia. (1977)

Dr. Bender is well known for his candid approach and casual style. A specialist in training and organizational development for business and government, he conducts seminars and workshops for management, supervisory, support staff, and customer service employees — anyone who needs to communicate effectively. He has worked with organizations across the US and Canada. Before his appointment at SIUE, Dr. Bender served as the Director of the Center for Governmental Research at Central Michigan University.

Recent strategic plan references include:

Mr. Mark Gifford, City Manager City of Big Rapids, Michigan (231) 592-4020

Ms. Susan Osbourne, Mayor City of Fenton, Michigan (810) 922-8477

Som MISA

Ms. Wendy Jean-Buhrer, City Manager City of Grand Blanc, Michigan (810) 694-1118

Mr. Patrick Waterman, City Manager City of Hudsonville, Michigan (616) 669-0703

Respectfully submitted:

Lewis G. Bender, Ph.D.

May 3, 2022

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Proposal Birmingham Strategic Plan 5322.doc

Strategic Planning Experience

- Winter 2022 Livingston County United Way, Strategic Plan
- Winter 2022 Lincoln Park, Michigan, Strategic Plan
- Winter 2022 Delhi Township, Michigan, Strategic Plan
- Winter 2022 City of Muskegon, Michigan, Strategic Plan
- Winter 2022 Livingston County Drain Commission, Strategic Plan
- Winter 2022 City of Big Rapids, Strategic Plan Update
- Winter 2022 City of Mt. Pleasant, One-Year Goals and Objectives
- Fall 2021 City of Belleville Michigan DDA Strategic Plan
- Fall 2021 City of Grosse Pointe, Michigan, Strategic Plan
- Fall 2021 Hudsonville, Michigan, Strategic Plan
- Fall 2021 City of Lowell, Michigan, Strategic Plan Update
- Fall 2021 City of Plymouth Michigan, Strategic Plan
- Fall 2021 Hartland Township Michigan, Strategic Plan
- Fall 2021 Wexford County Michigan Sheriff's Office, Strategic Plan
- Fall 2021 City of Fenton, Michigan, Strategic Plan
- Summer 2021 Buffalo Grove Fire Department Illinois, Strategic Plan
- Summer 2021 St. Joseph, County, Michigan, Strategic Plan
- Summer 2021 Livingston County Michigan, Strategic Plan
- Summer 2021 Grand Blanc Charter Township Michigan, Strategic Plan
- Spring 2021 Highland Park Illinois Police Department, Strategic Plan
- Spring 2021 Texas Township Michigan, Strategic Plan
- Spring 2021 Delta Township Michigan, Strategic Plan
- Spring 2021 Hamburg Township Utilities Team, Strategic Plan
- Winter 2020 Antrim County Road Commission, Strategic Plan
- Winter 2020 City of Grand Blanc, Michigan, Strategic Plan
- Winter 2020 City of Fenton, Michigan, Strategic Plan Update
- Winter 2020 City of Big Rapids, Michigan, Strategic Plan Update
- Fall 2019 City of Evart, Michigan, Strategic Plan
- Fall 2019 City of Plymouth, Michigan, Strategic Plan Update
- Fall 2019 Village of Plainfield, Illinois, Strategic Plan
- Summer 2019 Mutual Aid Box Alarm System Divisions 4 & 5 SRT Hainesville, Illinois –
 Strategic Plan
- Summer 2019 Bath Township, Michigan Library –Strategic Plan
- Summer 2019 St. Joseph County, Michigan Strategic Plan
- Spring 2019 Livingston County, Michigan Strategic Plan
- Spring 2019 Plainfield, Illinois –Strategic Plan
- Spring 2019 Warrenville, Illinois –Strategic Plan
- Spring 2019 Clinton County, Michigan –Strategic Plan
- Winter 2019 City of Plymouth, Michigan-Strategic Plan Update
- Winter 2019 City of Marshall, Michigan-Strategic Plan
- Winter 2019 City of Saline, Michigan-Strategic Plan
- Winter 2019 City of Big Rapids, Michigan-Strategic Plan
- Winter 2019 City of Lowell, Michigan-Strategic Planning
- Winter 2019 City of Tarpon Springs Police Department, Florida-Strategic Plan Update
- Fall 2018 Canton Township, Michigan-Strategic Plan Update
- Fall 2018 Village of East Dundee, Illinois-Strategic Plan
- Spring 2018 City of Fenton, Michigan-Strategic Plan
- Spring 2018 City of Lowell, Michigan-Strategic Plan and Team Building

- Spring 2018 Roscommon County, Michigan-Strategic Plan
- Spring 2018 Lake County Sheriff's Department, Illinois-Strategic Planning and Team Building
- Winter 2017 and Winter 2018 Marquette County Housing Commission, Michigan-Strategic Plan
- Winter 2018 City of Plymouth, Michigan-Strategic Planning and Team Building
- Winter 2018 Summer 2017 Fall 2015 Tarpon Springs Police Department, Florida-Strategic Planning and Team Building
- Spring 2017 Delhi Township, Michigan-Strategic Plan
- Spring 2017 Muskegon County, Michigan-Strategic Plan
- Winter 2017 Delta Township Library, Michigan-Strategic Plan
- Fall 2016 -Hartland Township Hartland, Michigan-Strategic Planning and Team Building
- Fall 2016 Hudsonville, Michigan-Strategic Planning
- Spring 2016 Village of Algonquin Department of Public Works, Illinois-Strategic Plan
- Spring 2016 Village of Plainfield, Illinois-Strategic Planning
- Spring 2016 -Michigan Academy of Family Physicians Foundation-Strategic Plan
- Spring 2016 City of Davison, Michigan-Strategic Plan
- Spring 2016 Monroe County Library, Michigan-Strategic Plan
- Winter 2015 Michigan Association of Drain Commissioners-Strategic Plan
- Winter 2015 Caledonia Township, Michigan-Strategic Plan
- Fall 2015 Apple Canyon Property Owners Association, Illinois-Strategic Plan
- Summer 2015 City of Marquette Housing Authority Marquette, Michigan-Strategic Plan
- Spring 2015 Van Buren County Board, Michigan-Strategic Plan
- Spring 2015 St. Louis County Police Department Missouri-Strategic Plan
- Fall 2014 Fall 2015 City of Saline, Michigan-Strategic Plan
- Fall 2014 Fall 2015 City of Fenton, Michigan-Strategic Planning and Team Building
- Summer 2014 Woodlands Library Cooperative-Strategic Plan
- Winter 2014 Engineering Enterprises Incorporated Chicago, Illinois-Strategic Plan
- Winter 2013 Dewitt Charter Township, Michigan-Strategic Plan
- Spring 2013 Van Buren County Board, Michigan-Strategic Plan
- Spring 2013 Kalamazoo County Board, Michigan-Strategic Plan
- Spring 2013 Clinton County Board, Michigan-Strategic Plan
- Summer 2013 Village of Plainfield, Illinois-Strategic Plan
- Summer 2013 City of O'Fallon, Illinois-Strategic Plan
- Fall 2013 County Road Association Self Insurance Fund, Michigan-Strategic Planning and Team Building
- Spring 2012 City of Fenton, Michigan-Strategic Plan
- Spring 2012, Michigan Chapter American Public Works Association-Strategic Plan
- Fall 2012 City of Grand Blanc, Michigan-Strategic Plan
- Fall 2012, Michigan Government Finance Officers Association-Strategic Plan
- Spring 2011 Cascade Charter Township, Michigan-Strategic Plan
- Spring 2011 City of Cedar Springs, Michigan-Strategic Plan
- Summer 2011 Village of Geneva, Illinois-Strategic Plan
- Fall 2011 Gaines Charter Township, Michigan-Strategic Plan
- Winter 2010 Spring 2015 Spring 2014-Grand Valley Metropolitan Council Grand Rapids,
 Michigan-Strategic Plan
- Spring 2010-Oakway Fire Consortium Birmingham, Michigan-Strategic Plan
- Summer 2010 Summer 2013-Michigan Municipal Treasurers Association-Strategic Plan
- Fall 2009-Barrington Area Council of Government Barrington, Illinois-Strategic Plan

- Fall 2009-Michigan Chapter of the American Public Works Association-Strategic Plan
- Fall 2009 Fall 2012-Village of Wauconda Police Department, Illinois-Strategic Plan, and Team Building
- Summer 2009 2015 Michigan Association of Municipal Clerks-Strategic Plan
- April 2009-City of Midland Midland, Michigan-Strategic Plan
- Summer 2007-Homeland Security Region III Bay City, Michigan-Strategic Plan
- Summer 2007-Homeland Security Region I Lansing, Michigan-Strategic Plan
- Winter 2005 City of Alma, Michigan-Strategic Plan
- Winter 2004 2005 2006 2009 Summit Pointe Community Mental Health System Battle Creek, Michigan-Strategic Plan, and Team Building
- Winter-Spring 2006-Alumni Association of Southern, Illinois University Carbondale, Illinois-Strategic Plan
- Winter 2006 City of Maplewood Missouri-Strategic Plan
- Fall 2005 Chamber of Commerce of Maplewood Missouri-Strategic Plan
- Fall 2005 –, Illinois Network of Child Care and Resource Referral Association Bloomington, Illinois-Strategic Plan and Team Building
- Spring 2004 Big Brothers and Big sisters of Sangamon County Springfield, Illinois-Strategic Plan
- Spring-Summer 2000 Winter 2004, Michigan Commission on Law Enforcement Standards Board Staff-Strategic Plan
- Winter 2002/Spring 2004, Strategic Plan and Team Building Development for Iroquois Memorial Hospital Watseka, Illinois-
- Fall 2000/2001 Cadillac Police Department Cadillac, Michigan-Strategic Plan
- Spring 2001 Council-Manager, City of Mt. Pleasant, Michigan-Strategic Plan
- Fall 2000 City of Sandusky Council-Manager Retreat-Strategic Plan
- Spring-Fall 2000/Fall 2001 Bay County Management Information System Bay County, Michigan-Strategic Plan
- Spring 2000 Iroquois Memorial Hospital Board Chicago, Illinois-Strategic Plan
- Spring 2000 Police Corps of Western, Illinois University Winter 2000 Southern, Illinois Law Enforcement Commission Strategic Direction for Officer Training Belleville, Illinois-Strategic Plan
- Winter 2000/Winter2001 Madison County Community Development "Continuum of Care 2000" – Homeless Strategy for Madison County, Illinois-Strategic Plan

Dr. Bender has other extensive strategic planning experience, research, and teaching prior to 2000.