

**City of St. Charles, Illinois
Resolution No. 2022-**

**A Resolution A Resolution Authorizing the Mayor and City Clerk
of the City of St. Charles to Execute a Certain Agreement
Between the City of St. Charles and Berry Dunn
for Strategic Plan Services**

**Presented & Passed by the
City Council on _____**

WHEREAS, The Strategic Plan is a critical element of City Planning, and the previous Strategic Plan provided direction through 2020;

WHEREAS, two proposals were received from firms which provide Strategic Planning Services and Berry Dunn submitted the proposal most in line with the City's needs, and also the lowest cost price;

THEREFORE, BE IT RESOLVED by the Mayor and City Council of the City of St. Charles, Kane and DuPage Counties, Illinois, to authorize a Contract with Berry Dunn for Strategic Plan Services.

PRESENTED to the City Council of the City of St. Charles, Illinois, this _ day of June, 2022

PASSED by the City Council of the City of St. Charles, Illinois, this _ day of June, 2022

APPROVED by the Mayor of the City of St. Charles, Illinois, this _ day of June, 2022

Lora Vitek, Mayor

ATTEST:

City Clerk

COUNCIL VOTE:

Ayes:

Nays:

Absent:

Abstain:

AGREEMENT BETWEEN CITY OF ST. CHARLES AND

BERRY, DUNN, MCNEIL & PARKER, LLC dba BERRYDUNN

This AGREEMENT, made and entered into this ___ day of May, 2022, by and between the City of St. Charles, a City of the State of Illinois, with an office located at 2 East Main Street, St. Charles, IL 60174, hereinafter referred to as the "CITY," and Berry, Dunn, McNeil & Parker, LLC dba BerryDunn, with an office located at 2211 Congress Street, Portland, ME 04102, hereinafter referred to as the "CONSULTANT."

WITNESSETH: That the CONSULTANT does hereby agree with the CITY, for the consideration named herein, to perform the services stipulated in this AGREEMENT.

1. CONSULTANT'S SERVICES

A. The CONSULTANT, on behalf of the CITY, shall perform and carry out in a professional manner components essential to provide Strategic Planning Services.

B. The Scope of Work shall be defined by the CITY'S Request for Proposal No. RFP-ADM2022-11-0-2022/BP entitled "Request for Proposal for Strategic Planning Services" dated March 1, 2022, and CONSULTANT'S response entitled, "Proposal in Response to RFP #ADM2022-11 City of St. Charles Strategic Planning Services" dated April 1, 2022. The CITY'S Request for Proposal and CONSULTANT'S Proposal Response are incorporated herein by reference and attached hereto together as Exhibit A.

C. Compensation for work provided by CONSULTANT will be as follows:

(Choose One)

Please see Exhibit A, Proposal Response page 25, "Price Proposal Page."

2. THE CITY SHALL PROVIDE

A. Access to pertinent information and available data requested by the CONSULTANT.

B. Certain assumptions that may be necessary to the CONSULTANT.

C. Attendance and participation at all scheduled meetings and work sessions.

D. Timely review of draft and preliminary materials submitted by the CONSULTANT.

3. DOCUMENTS

All documents and services provided by the CONSULTANT pursuant to this AGREEMENT are instruments of service with respect to this project. Upon receipt of payment for services due, the CONSULTANT'S documents and material developed by the CONSULTANT under this AGREEMENT are the property of the CITY. The CITY shall have the right to re-use documents and computer software on extensions of the project or for other projects; such re-use shall be at

the CITY'S sole risk and without liability or legal exposure to the CONSULTANT.

4. NONDISCLOSURE OF PROPRIETARY INFORMATION

The CONSULTANT shall consider all information provided by the CITY and all reports, studies, and other documents resulting from the CONSULTANT'S performance of this service to be proprietary unless such information is available from public sources. The CONSULTANT shall not publish or disclose proprietary information for any purpose other than the performance of the services without the prior written authorization of the CITY or in response to legal process. The CONSULTANT shall maintain all originals in the CONSULTANT'S files for a period of not less than three (3) years from the final report and shall provide the CITY access to and the right to examine and copy information contained in the files pertaining to the services. In the event of legal process, the rights of access, examination, and copying hereunder shall continue until the final conclusion of any litigation, appeals, claims, arbitration, or other legal process.

5. CHANGES AND ADDITIONS

It shall be the responsibility of the CONSULTANT to notify the CITY, in writing, of any necessary modifications or additions in the Scope of this AGREEMENT. Compensation for changes or additions in the Scope of this AGREEMENT will be negotiated and approved by the CITY and CONSULTANT in writing.

6. ADDITIONAL SERVICES

The CITY, at its discretion, may request additional services. When requested by the CITY, in writing, the CONSULTANT may perform additional services, associated with this project, which are outside the original scope of services. Compensation for these additional services will be based on current billing rates plus reasonable travel expenses. The CITY shall approve the scope, number of hours, and fee schedule for such services with the CONSULTANT before any additional work commences.

7. NOTICE

Any notice, demand, or request required by or made pursuant to this AGREEMENT shall be deemed properly made if personally delivered in writing or deposited in the United States mail, postage prepaid, to the representative specified below or as otherwise designated in writing and mutually agreed. However, any notice of suspension or termination pursuant to paragraph 9 hereof, if mailed, shall be sent by United States certified mail, postage prepaid, return receipt requested and shall not become effective until the date of receipt. Nothing contained in this Article shall be construed to restrict the transmission or routine communications between representatives of the CONSULTANT and the CITY.

A. The name and mailing address of CITY'S Representative for purposes of this notice provision, unless and until another person is designated in writing, will be: Heather McGuire, City Administrator City of St. Charles, 2 East Main Street, St. Charles, IL 60174.

B. The name and mailing address of CONSULTANT'S Representative for purposes of this notice provision, unless and until another person is designated in writing, shall be: Seth Hedstrom, Principal, Berry, Dunn, McNeil & Parker, LLC, 2211 Congress Street, Portland, ME 04102.

8. MANNER OF PAYMENT

A. The CONSULTANT shall furnish the CITY with timely progress invoices each month for services rendered to date for each project phase. The terms of payment will be net thirty (30) days.

B. Late payment charge can be assessed at the rate of one percent (1%) per month for any past due payments.

C. Should any statement be the subject of a legitimate dispute between the parties, no late payment charge shall apply to any amounts not paid by the CITY because of said dispute; CITY shall pay all amounts not reasonably deemed to be included in the dispute.

9. FORCE MAJEURE

CONSULTANT will endeavor to use commercially reasonable efforts to complete all work contemplated under this Agreement. However, neither party shall be liable to the other for any failure to perform, or delay in performance of, any obligation under this AGREEMENT to the extent such failure or delay shall have been wholly or principally caused by acts or events beyond CONSULTANT'S reasonable control rendering performance illegal or impossible. As used in this section, "force majeure" means any cause beyond the reasonable control of a party including, but not limited to, an act of God, nature, act of aggression, fire, strike, flood, riot, war, delay of transportation, terrorism, pandemics or other widespread outbreaks of infectious diseases or inability due to the aforementioned causes to obtain necessary labor, material, or facilities.

10. TERMINATION OR SUSPENSION OF CONTRACT

A. The obligation to continue services under this AGREEMENT may be terminated by either party upon written notice in the event of substantial failure by the other party to perform in accordance with the terms hereof through no fault of the terminating party; provided, however, that the terminating party has first given the other party written notice of the reason for such termination and the other party has failed to cure or rectify the issue or matter within fifteen (15) days of receipt of such notice.

B. In the event the CITY terminates the CONSULTANT'S services as permitted under Section 10.A of this AGREEMENT, the CITY shall pay the CONSULTANT for all services performed to the effective date of termination. The CONSULTANT shall be entitled to receive only the fair value of services rendered and direct out of pocket expenses incurred hereunder prior to the effective date of such termination. Upon restart of a project previously terminated, equitable adjustment may be made to compensation for remobilization of the project.

11. ASSIGNMENT

Neither the CITY nor the CONSULTANT shall assign or transfer their rights or obligations in the AGREEMENT without the written consent of the other; such consent shall not be unreasonably withheld.

12. INSURANCE

The CONSULTANT shall purchase and maintain insurance coverage. Insurances shall cover all CONSULTANT'S employees while performing any work incidental to the performance of the agreement between the CITY and the CONSULTANT.

13. ETHICS IN PUBLIC CONTRACTING

The CONSULTANT certifies that its proposal is made without collusion or fraud and that CONSULTANT has not offered or received any kickbacks or inducements from any other contractor, supplier, manufacturer, or subcontractor in connection with CONSULTANT'S proposal; that CONSULTANT has not conferred with any public employee having official responsibility for this procurement transaction; and that CONSULTANT has not received any payment, loan, subscription, advance, deposit of money, services, or anything of more than nominal value, present or promised, in connection with this proposal or procurement transaction, unless consideration of substantially equal or greater value was exchanged.

14. SEVERABILITY

If any part, term, or provision of this AGREEMENT shall be found by a Court to be legally invalid or unenforceable, then such provision or portion thereof shall be performed in accordance with applicable laws to the extent possible. The invalidity or unenforceability of any provision or portion of this AGREEMENT or any contract document related to this AGREEMENT shall not affect the validity of any other provision or portion of this AGREEMENT or any related contract document.

15. AGREEMENT CONSTRUED UNDER ILLINOIS LAWS

The AGREEMENT is deemed to be executed and performed in the State of Illinois and shall be construed in accordance with the laws of Illinois.

16. ENTIRE UNDERSTANDING

This AGREEMENT comprises the entire understanding between the parties and cannot be modified, altered or amended, except in writing and signed by all parties.

By signing below, the parties hereto have executed and sealed this AGREEMENT as of the day and year first above written.

CITY OF ST. CHARLES

**BERRY, DUNN, MCNEIL & PARKER,
LLC dba BERRYDUNN**

By:

By:

Print Name: Heather McGuire

Name: Seth Hedstrom

Title: City Administrator

Title: Principal

Date:

Date:



Price Proposal Page

Strategic Planning Services (ADM2022-11)

I (we) propose to furnish all services as specified in the attached solicitation documents at the below price. No additional charges over said pricing will be accepted by the City without an authorized change order and written approval by the Purchasing Division confirmed via purchase order amendment.

Description of Work	Price
All-Inclusive Sub-Total	

Additional Hourly Rate for Post-Deliverable As-Needed Services: \$ _____

Detail any additional costs below:

The Offeror shall propose a lump sum, not to exceed cost to completely fulfill the scope of work. The lump sum shall be divided into the categories noted on the Price Proposal Form listed above.

(Please note that price is only one factor for consideration of award)

We will accept payment via City of St. Charles credit card, without additional fees. Yes No

We will allow a discount of _____% if payment is received within _____ days of invoice.



PROPOSAL IN RESPONSE TO RFP #ADM2022-11

City of St. Charles

Strategic Planning Services

BerryDunn

2211 Congress Street
Portland, ME 04102-1955
207.541.2200

Seth Hedstrom

Project Principal and
Engagement Manager
shedstrom@berrydunn.com

Shannon Flowers

Project Manager and Co-Facilitator
sflowers@berrydunn.com

Responses to RFP Due Prior to
April 1, 2022 before 2 p.m.

April 1, 2022

City of St. Charles
2 Main Street
St. Charles, IL 60174

To Whom It May Concern:

On behalf of Berry Dunn McNeil & Parker, LLC (BerryDunn), I am pleased to submit this response to the City of St. Charles' (the City's) Request for Proposals (RFP) No. ADM2022-11 for Strategic Planning Services. We have read the City's RFP, reviewed its terms and conditions, and understand the contents therein. Our proposal is a firm and irrevocable offer valid for 90 calendar days from the proposal submission deadline of April 1, 2022.

BerryDunn is a nationally recognized independent management and information technology (IT) consulting firm, headquartered in Portland, Maine with eight office locations nationally. **Focused on inspiring organizations to transform and innovate**, we are a stable and well-established firm that has preserved our core values and reputation for excellence throughout our 48-year history. We have enjoyed steady growth by providing consistent, high-quality services to our clients in all 50 states—including numerous in the State of Illinois (the State)—and in Canada.

Our firm's culture is centered on a deep understanding of our clients' commitment to serving the public. The human aspect of projects can often be forgotten in the maze of regulatory changes and legal requirements with which counties, cities, and their departments must comply. BerryDunn proudly tailors each of its projects to recognize the work our clients do every day. **We care about what we do, and we care about the people impacted by our work—including those at the City.** Even during the COVID-19 pandemic, we have placed a strong focus on supporting our clients and our employees. In fact, we have neither decreased the size of our team nor conducted layoffs during this time. We presently employ more than 700 professionals and continue to experience a steady increase of our employee count year after year.

With a clear understanding of the requested work effort, extensive experience conducting similar projects, and several notable attributes that differentiate us from other proposers, we are certain that we are the right partner to help the City conduct this strategic planning effort successfully. We are proud to further elaborate on our firm's key attributes and qualifications in the key points that follow.



Our decades of relevant strategic planning experience

BerryDunn's Local Government Practice Group is dedicated to serving the public sector and provides a wide variety of services, informing and enhancing our ability to support our clients with strategic planning initiatives. We are skilled at facilitating, communicating, and visioning. In fact, our project team members have collectively facilitated more than 50 strategic planning processes. This broad exposure to the strategic planning process gives us an in-depth understanding of the importance in establishing trust and credibility with stakeholders and effectively engaging said stakeholders in the planning process to build buy-in for a common vision and commitment to action.



Our results-driven and actionable strategic plans

The City can be confident that our collaborative approach will result in an actionable City of St. Charles Strategic Plan due to our thorough information-gathering and analysis activities and our focus on developing performance metrics and outcome measures. We will seek to fully understand the City's

current environment, disparities, emerging trends, and opportunities to align this effort with other initiatives occurring within the City. With this understanding as the foundation, we will help the City develop sound strategies, key metrics, and effectively monitor, track, and report its progress.



Our strong facilitation approach and communication skills

We understand that reaching consensus can be difficult as individuals seek to advocate for the needs and concerns they believe in most and that represent the interests of their constituencies. Our approach is designed to meet the needs of stakeholders, including elected and appointed officials, managers, front-line staff, and the public. Leveraging the Institute of Cultural Affairs' (ICA's) Technology of Participation (ToP®) facilitation methodology, we will help ensure the City's strategic planning sessions are highly collaborative and inclusive of all stakeholders. The ToP® methodology emphasizes structured participation that pulls information into the group's thinking process and creates a clear intention, helping members of the group align with one another and reach consensus. That said, throughout the City's process, we will keep stakeholders informed and involved and help ensure its strategic planning efforts are inclusive of all perspectives and reflects a shared vision.



Our proven tools and technologies

Throughout our long history of providing strategic planning consulting services, we have developed, refined, and adopted proven tools and technologies to support our efforts. Notably, we utilize Social Pinpoint as an effective option for collecting public input in a fairly hands-off manner. Social Pinpoint is a customizable community engagement platform that provides opportunities for stakeholders to stay informed, interact, and provide information during the strategic planning process. We have developed Social Pinpoint sites for numerous clients and have experienced a highly inclusive and participatory process, resulting in valuable contributions and increased support and buy-in for findings and outcomes. Because the City desires community engagement in this process, we would leverage this tool to encourage broad participation, inclusivity, and partnership.



Our demonstrated commitment to serving clients in the State

With BerryDunn, the City will be served by a firm that has experience serving clients in the State and resources who reside locally. Notably, our proposed community services subject matter expert resides in the State. Further, our experience includes work with the following clients, several of which we performed comparable services for:

- Chicago Metropolitan Agency for Planning
 - State Board of Education
 - Lake County
 - McHenry County*
 - Northbrook Park District
 - Peoria County
 - St. Charles Park District
 - St. Clair County
 - Village of Downers Grove
 - Village of Oak Park
 - Village of Schaumburg
 - Western Illinois University
- *work performed by a project team member prior to joining BerryDunn*

As a principal and the leader of our Local Government Practice Group, I am authorized to bind BerryDunn to the commitments made herein and can attest to the accuracy of our provided materials. Should you have any questions regarding our proposal or updates on the evaluation process, please feel free to contact me directly.

Sincerely,



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1. Cover Page



Cover Page

Strategic Planning Services (ADM2022-11)

Based on
Addendum # _____

Proposal Prepared By:		Contacts:	
Firm Name		Operations: Scheduling and Managing the Work	
DBA		Contact Name	
Address		Contact Phone #	
		Contact E-mail	
City, St, Zip		Sales: Price, Quality, and Service	
Signature		Contact Name	
Print Name		Contact Phone #	
Position		Contact E-Mail	
Phone #		Customer Service: Purchase Order, Invoicing, Payment	
Fax #		Contact Name	
E-mail Address		Contact Phone #	
		Contact E-Mail	

This business Firm is (check one) An Individual A Partnership A Corporation An LLC

Exceptions: (check one)

This proposal meets and accepts all Requirements, Specifications, Terms and Conditions and Contract Language.

We hereby take the following Exceptions to the Requirements, Specifications, Terms and Conditions and Contract Language (*reference section name and identifying reference*):

We provide details of our proposed exceptions on the following page for further review and consideration.

1.1 Exceptions

Listed below are three requested exceptions to the City's provided terms and conditions. We believe in being fully transparent about any potential conflicts at the time of proposal. To this end, we have our Compliance Team perform a thorough review. As consultants focused on government clients, we are well aware of the limitations on exceptions and additional constraints. If selected for this project, we fully expect to work with the City to reach an agreement on these terms that is fair and beneficial to both parties.

Page 22, Section C – Given the nature of this engagement, we request that the following be added to this paragraph: “Notwithstanding anything to the contrary contained herein or in any attachment hereto, any and all intellectual property or other proprietary data owned by Professional Service Provider prior to the effective date of this Agreement (“Preexisting Information”) shall remain the exclusive property of Professional Service Provider even if such Preexisting Information is embedded or otherwise incorporated into materials or products first produced as a result of this Agreement or used to develop such materials or products. City's rights under this section shall not apply to any Preexisting Information or any component thereof regardless of form or media. Nothing in this clause is intended to affect Professional Service Provider's right to use generic know-how learned in the course of providing services under the Agreement for the future benefit of City or others.”

Page 22, Section B – We would like to request that written notice and an opportunity to cure be provided before the Contract is terminated for cause as in Section B.

Page 25, Indemnification, Section B – We take exception to the last line that states we would be liable for a “contractor hired to provide any goods or perform any services on behalf of the Professional Service Provider.” BerryDunn has a robust professional liability insurance policy for acts or omissions of BerryDunn, our agents, employees and subcontractors. This policy contains language within it that states that it will not apply if BerryDunn takes on additional liabilities under contract, such as the agreement to indemnify a party for its own negligence, or a third party's negligence.

2. Signature Page



Signature Page

Strategic Planning Services (ADM2022-11)

The undersigned proposes and agrees, after having examined the requirements and specifications, to irrevocably offer to furnish the services in compliance to all terms, conditions, specifications and applicable addenda. I (we) hereby certify and affirm that being first duly sworn an oath, deposes and states that all statements made herein are made on behalf of the Offeror, that this despondent is authorized to make them and the statements contained herein are true and correct.

In Witness Whereof, the parties have entered into this Contract upon the latter of the date accepted and signed by the City and the date accepted and signed by the Contractor.

For: City of St. Charles

By: _____
City Administrator – Heather McGuire

ATTEST _____

DATE _____

For: Professional Service Provider

If an Individual

By: _____
Signature

Title

If a Partnership

By: _____
Signature

Title

By: _____
Partner

If a Corporation

By: _____
Signature of person authorized to sign

Title

ATTEST _____

If a Joint Venture

By: _____
Signature

Title

By: _____
Signature

Title

DATE _____

Attach seal here

3. References and Qualifications

3.1 Firm Overview

BerryDunn is a nationally recognized independent management and IT consulting firm focused on inspiring organizations to transform and innovate. As a Limited Liability Company formed in 1974 with 57 principals, 29 owners, and eight office locations—we have experienced sustained growth throughout our 48-year history.

We employ more than 700 staff members—including more than 250 in our Consulting Services Team. Our team members bring valuable perspective from their **extensive project experience for more than 400 state, local, and quasi-governmental agencies**, as well as their prior experience serving state and local government agencies. This experience provides them with an in-depth understanding of government operations, staffing needs, budgetary constraints, and the business processes required to provide necessary services to your internal divisions and the constituents you serve.

Our firm provides a full range of professional services including:

- **Enterprise and Departmental Strategic Planning**
- Organizational Change Management (OCM)
- Organizational, Operational, and Staffing Analyses
- Leadership and Organization Development
- Performance Analyses
- Business Process Reviews and Redesign
- Master Planning
- Cost of Service and Fee Studies
- Software Planning and Procurement
- Software Implementation Project Management and Oversight
- Project Assessments and Remediation
- IT Assessments
- IT Strategic Planning

Figure 1 illustrates the overall organization of BerryDunn's Local Government Practice Group. We provide unparalleled expertise and unique insights across these practices, supporting our clients in solving some of their biggest challenges and addressing opportunities to improve and plan.

Figure 1: Local Government Practice Group Specialization



3.2 Previous Names

We have been operating under Berry Dunn McNeil & Parker, LLC since February 9, 1999. Other names under which our organization has been organized and conducted business include:

Berry, Dunn & McNeil Chartered – from 1974 to 1982

Berry, Dunn, McNeil & Parker Chartered – from 1982 to 1999

3.3 Evidence of Financial Stability

As a privately held Certified Public Accounting and Consulting firm, BerryDunn is not required to prepare audited or un-audited financial statements. However, the financial information and exhibits provided in

this section exemplify the strong financial condition of our firm. BerryDunn has sustained steady growth during our 48-year history.

Should the City require additional information regarding BerryDunn’s financial stability, we would be pleased to provide that at your request.

Figure 2 presents BerryDunn’s revenue for the previous 15 fiscal years. Figure 3 provides BerryDunn’s Condensed Financial Information for the previous three fiscal years.

Figure 2: BerryDunn Yearly Revenue (in millions) Previous 15 Fiscal Years

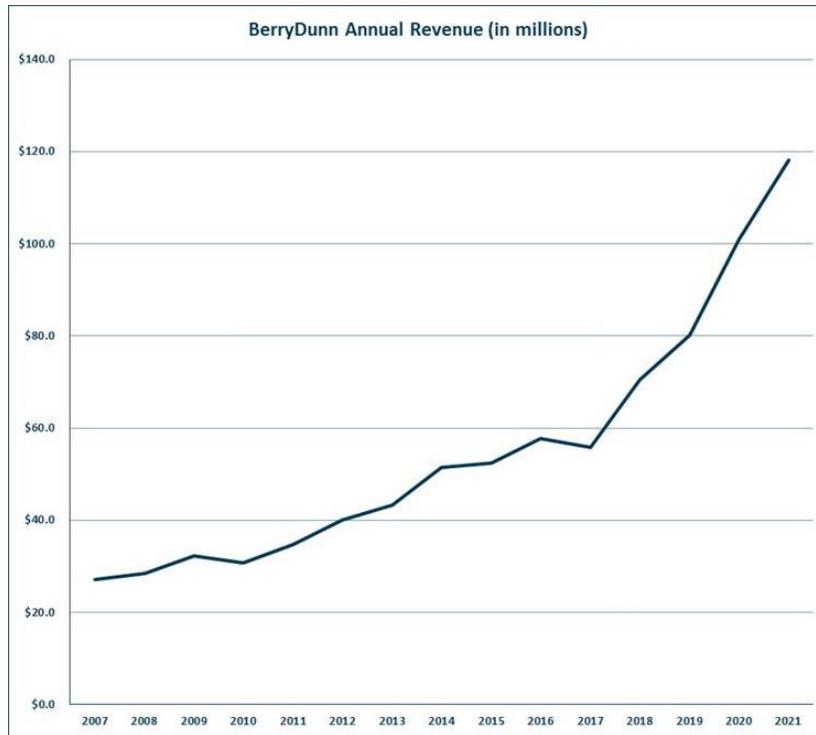


Figure 3: Condensed Financial Information for the Years Ended June 30

	FY19	FY20	FY21
Current Assets	\$ 23,522,465	\$ 35,993,582	\$ 42,783,489
Fixed Assets, Net	3,439,420	3,294,450	6,388,402
	<u>\$ 26,961,885</u>	<u>\$ 39,288,032</u>	<u>\$ 49,171,891</u>
Current Liabilities	7,755,046	16,852,123	20,886,863
Amounts due Principals & Principals' Equity	19,206,839	22,435,909	28,285,028
	<u>\$ 26,961,885</u>	<u>\$ 39,288,032</u>	<u>\$ 49,171,891</u>
Operating Revenue	80,072,954	100,873,623	118,086,764
Salary & Benefits	(47,486,161)	(61,300,880)	(72,173,444)
Depreciation & Amortization	(767,886)	(972,118)	(1,061,243)
Interest Expense	(115,830)	(108,420)	(27,998)
All Other Operating Expenses	(18,495,582)	(21,981,966)	(23,565,673)
Net Income	<u>\$ 13,207,495</u>	<u>\$ 16,510,239</u>	<u>\$ 21,258,406</u>

The above information is confidential and proprietary to Berry, Dunn, McNeil & Parker. Any inquiries or requests for additional information should be directed to Sarah Belliveau, CEO

**Request for Taxpayer
Identification Number and Certification**

**Give Form to the
requester. Do not
send to the IRS.**

► Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type.
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
Berry, Dunn, McNeil & Parker LLC

2 Business name/disregarded entity name, if different from above
BerryDunn

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

Individual/sole proprietor or single-member LLC

C Corporation

S Corporation

Partnership

Trust/estate

Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► **P**

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

Other (see instructions) ►

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.
2211 Congress Street

6 City, state, and ZIP code
Portland, ME 04102

7 List account number(s) here (optional)

Requester's name and address (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

				-					
--	--	--	--	---	--	--	--	--	--

or

Employer identification number

0	1	-	0	5	2	3	2	8	2
---	---	---	---	---	---	---	---	---	---

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here Signature of U.S. person ► *Elizabeth Topolt* Date ► *2/24/2022*

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

3.5 Potential Conflicts of Interest

BerryDunn does not have any potential conflicts of interest related to any activity associated with this specific service.

3.6 Commitment to Client Satisfaction

We take the quality of our work seriously and aim to exceed clients' expectations of the value and timeliness of our communications, service delivery, and final work products. We strive to help assure quality by understanding client expectations, developing a reasonable and achievable project approach, gaining concurrence on project tasks and timing, and using appropriate staff for each engagement.

To help measure client satisfaction, BerryDunn hires an independent firm to conduct an annual client satisfaction survey. We also measure success by our ability to consistently meet or exceed clients' expectations. Seventy percent of our consulting work comes from repeat business with clients, which is a testament to clients' satisfaction with our services and work products.

The results of our 2020 survey show a high level of client satisfaction, as evident by the key metrics from the survey depicted on the next page.



3.7 Quality Management

BerryDunn believes that providing high-quality services to clients is necessary for carrying out the firm's mission, achieving its goals, and striving toward its vision of the future. BerryDunn defines quality by the following criteria:

- The level to which our work conforms to the agreement with clients and best meets their needs
- The clarity and presentation of our engagement deliverables
- Confirmation from our clients regarding the value of our services

To help maintain and continuously improve the quality of consulting services BerryDunn provides its clients and to promote consistency of services and deliverables across all engagements, BerryDunn utilizes and follows our Consulting Quality Management (CQM) Program. The CQM Program is led and managed by a CQM Committee, and all consulting team members apply the CQM Program policies in their daily work.

The City will benefit from BerryDunn's CQM Program by:

- Gaining confidence that the BerryDunn team members who work with City staff are competent professionals with the qualifications necessary to successfully perform their duties

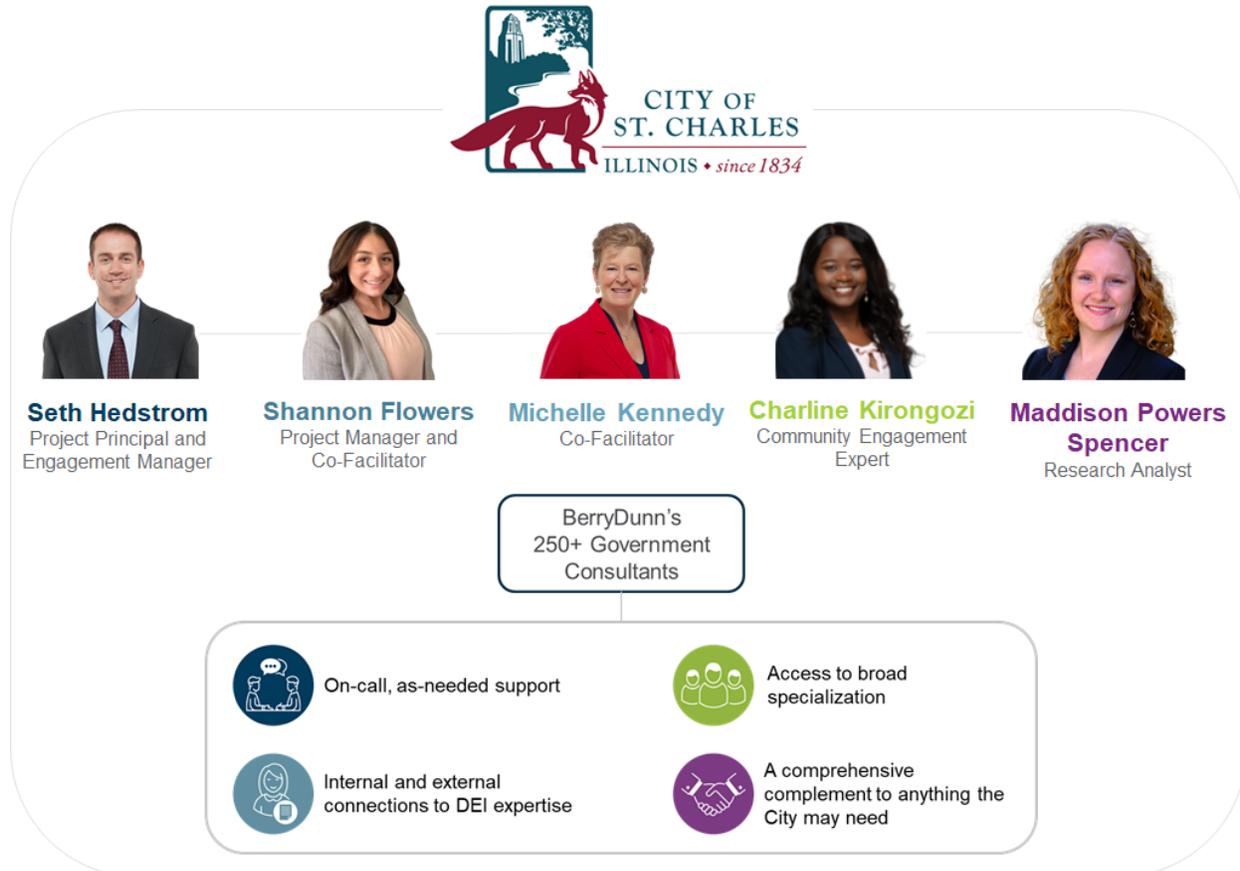
- Receiving high-quality services and deliverables that align with agreed-upon expectations, applicable best practices, and industry standards
- Experiencing consistency in services and deliverables across BerryDunn team members and projects
- Recognizing efficiencies garnered through reduced time spent reviewing deliverables and managing contractual or other engagement issues

3.8 Proposed Project Team

Organizational Structure

At BerryDunn, we believe in the synergy that accompanies a team approach. To that end, we have carefully assembled a comprehensive project team, illustrated in Figure 4 below. These project team members have the necessary expertise and availability to best accommodate the goals and objectives for this strategic planning initiative.

Figure 4: Project Team Organizational Structure



Roles, Responsibilities, and Qualifications

On the following pages, we provide detail of our project team members' roles, responsibilities, and qualifications as it relates to the City's strategic planning project. Due to the scope of work, and our project team's credentials and capabilities, we will not be using subcontractors for this project. **Our project team members' full resumes are included in Appendix A for the City's further review and consideration.**



Seth Hedstrom, PMP®, LSSGB | Project Principal and Engagement Manager

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

As the **project principal and engagement manager**, Seth will:

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



Shannon Flowers | Project Manager and Co-Facilitator

Shannon is a senior consultant in our Local Government Practice Group. She has more than 20 years of experience in local and state government, many of which have been spent in director, C-suite, and senior-level roles. During that time, Shannon led a variety of teams through strategic planning and execution. Her experience engaging staff and stakeholders in the process has led to the development of plans that were met with broad ownership and acceptance. Her strong understanding of the business processes that support efficient operations gives her the insight necessary to establishing actionable and achievable objectives that move an organization forward. Her clients benefit from her focus on change management and business process improvement, as well as her experience training and leading staff through difficult transitions.

As the **project manager and co-facilitator**, Shannon will:

- Work directly with the City and engage in managing the work
- Design and conduct interviews, community visioning forums, and strategic planning sessions
- Serve as the City’s primary point of contact
- Develop the final City of St. Charles Strategic Plan document
- Participate in meetings with City leadership
- Prepare and present the final City of St. Charles Strategic Plan document to City Council for approval
- Lead our work and perform day-to-day project management and staff oversight
- Prepare City staff in developing a system to implement the strategic plan and track its progress
- Develop and maintain the Project Work Plan and Schedule
- Lead the development of project deliverables



Michelle Kennedy, Prosci® CCP, ODCC | Co-Facilitator

Michelle is a manager in our Local Government Practice Group and has more than 30 years of government-sector management and consulting experience. She is an expert in organizational development, including strategic and business planning, leadership

development and executive coaching, organizational assessments, organizational change management, program evaluation, business process improvement, and performance measurement. Michelle has provided consulting services and project leadership for state and local government agencies throughout the United States. She is a strong facilitator and is certified in several related areas including in the ICA ToP® facilitation methodology. Michelle has facilitated the development and writing of strategic plans for 50 public-sector organizations.

As the **co-facilitator**, Michelle will:

- Work directly with the City and engage in facilitating the work
- Design and conduct interviews, community visioning forums, and strategic planning sessions
- Develop the final City of St. Charles Strategic Plan document
- Prepare the final City of St. Charles Strategic Plan document to City Council for approval
- Prepare City staff in developing a system to implement the strategic plan and track its progress



Charline Kirongozi, MPA, CAPM® | Community Engagement Expert

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

As the **community engagement expert**, Charline will:

- Help design the facilitation approach to interviews, community visioning forums, and strategic planning sessions
- Develop the City's Social Pinpoint site
- Help facilitate interviews and community visioning forums
- Document and/or report findings and recommendations



Maddison Powers Spencer, MPA | Research Analyst

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

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

- Actively engage and support the project team
- Review and analyze the City's existing data and documentation
- Support the facilitators in documenting and reporting the artifacts, work products, and outcomes of engagement efforts and strategic planning meetings

The BerryDunn Network

We are pleased to highlight resources from the extended BerryDunn Network. This pool of subject matter experts will support the City's work effort on an as-needed basis. These individuals are representative of the more than 250 government consultants we have at BerryDunn with broad specialization. We will draw from this pool when and where it will benefit the City most during its strategic planning effort.



Keri Ouellette, AICP | Community Development Subject Matter Expert

Keri is a senior consultant in our Local Government Practice Group and an expert in community development operations. She joined BerryDunn in 2021 after four years working for the City of Portland, Maine as a permitting manager, where she gained a broad understanding of the complex issues that face the City and region and the challenges that municipalities face in addressing growth and managing enforcement. In addition, Keri's previous work with New York City's Department of Housing Preservation and Development and the Town of Eastchester, New York allowed her to develop a keen understanding of local government policy development in both a small town and a large city agency. She helps clients take the steps to evaluate processes and develop standard operating procedures to improve efficiency.



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

Michele is a manager in our Local Government Practice Group. She has over 27 years of experience in the public sector. Her background includes more than 17 years as a chief of police for three different Minnesota police departments, and several years serving as a subject matter expert, consultant, and adjunct faculty member for the International Association of Chiefs of Police (IACP) Leading by Legacy program. She has extensive experience instructing hundreds of police officers and police executives in the areas of staff supervision, leadership development, organizational management, and policing skills.



Dannielle (Dannie) Wilson, MS, Prosci® CCP | Community Services Subject Matter Expert

Dannie is a senior consultant in our Local Government Practice Group and has spent more than 15 years in positions of progressive responsibility in parks and recreation agencies or as a consultant to these agencies nationwide. She currently focuses on providing consulting support for master planning, strategic planning, and recreation program assessments. Dannielle is a strategic thinker who encourages the utilization of technology and data to progress the field of parks and recreation. Dannie is located in Illinois and is part of the Illinois Parks and Recreation Association as well as Board Chair for the Oswegoland Park District Foundation.

3.9 Relevant Experience

BerryDunn has been providing services similar to those requested by the City for more than 30 years. Through this experience, we have assisted public-sector clients with a variety of organizational development services, including:

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

On the following page, we provide a representative list of clients for whom we have recently performed similar services within **the last six years**.

- Association of Oregon Counties
 - City of Beaverton, Oregon
 - City of Cooper City, Florida
 - City of Creswell, Oregon
 - City of Edgewater, Colorado*
 - City of Gresham, Oregon
 - City of Groveland, Florida
 - City of Milton, Georgia
 - City of Redlands, California
 - City of Washougal, Washington*
 - City of Wausau, Wisconsin
 - City of Westminster, Colorado
 - Lake County, Illinois
 - Lane County, Oregon
 - Metro Parks Tacoma, Washington
 - Oregon Department of Environmental Quality
 - Oregon Department of Human Services
 - Oregon Harbor of Hope
 - San Mateo County, California
 - Tualatin Hills Parks and Recreation District, Oregon
 - Weld County, Colorado*
- *Selected, but not contracted with yet*

3.10 Current Strategic Planning Contracts

Below, we list our current strategic planning projects as well as their current stages.

- **City of Creswell, Oregon**
Community and stakeholder engagement is underway; the final plan is scheduled to be completed in June 2022.
- **City of Groveland, Florida**
We are currently engaged in the final stage of plan development; the strategic planning steering committee will present the draft plan to the City Council in March 2022; final adoption by City Council will be in April 2022.
- **City of Redlands, California**
The plan was unanimously approved and adopted by City Council in mid-March 2022.
- **City of Wausau, Wisconsin**
We are currently engaged in the final stage of plan development; final draft and City Council adoption will take place in April 2022.
- **City of Westminster, Colorado**
Work with department directors and key staff to fine-tune objectives and performance measures is nearing completion. Plan adoption by City Council will be in April 2022.
- **City of Cooper City, Florida**
The City’s plan is completed; City Commission unanimously adopted the plan in February 2022.
- **Lane County, Oregon**
Community review of the draft plan is underway and plan development is nearly complete; the County Board will review and adopt the plan in April 2022.

4. Narrative Response

4.1 Work Overview



Four words that have largely shaped the City's past and defined its future.

St. Charles is a perfect representation of a community that has successfully retained its identity and sustained its priorities both in the short- and long-term. The City has achieved this for a variety of reasons. One of note is its focus on effectively addressing current needs and proactively planning for what's to come.

Not new to the strategic planning process, St. Charles developed its last strategic plan in 2016. This plan charted the actions necessary to make sound progress toward the City's desired future over a five-year timeframe. While this plan was successful in many ways—like fueling successful high-profile development and redevelopment projects—the sun has since set, and it is now time to revitalize the strategic planning process and begin planning for the next five-year cycle.

St. Charles has emerged from the pandemic ready to regain focus. This is particularly important as other factors beyond the strategic plan's expiration are now contributing to the need to facilitate its next strategic planning process. Notably, the City has experienced significant staffing changes within its administration—the election of a new Mayor and the appointment of a new City Administrator in mid-2021, as well as the election of six new aldermen. As such, developing a new strategic plan will play an important role in making collective progress toward a shared vision for the City's future as St. Charles enters into this new era.

As a nationally-recognized firm with a dedicated Local Government Practice Group, we have more than 30 years of experience conducting strategic planning initiatives for local government organizations. Our clients benefit from our:

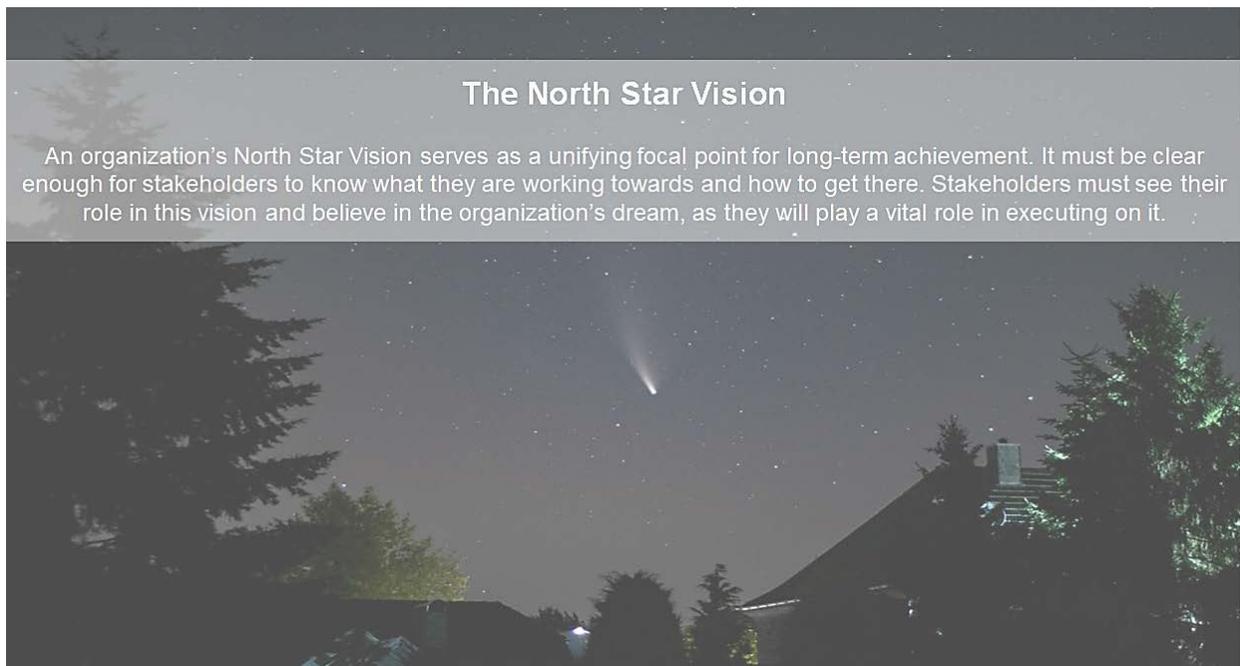
- Proven yet flexible approach
- Supportive engagement and facilitation methodologies
- Deep background in performing comparable projects
- Broadly specialized staff

This—along with our clear understanding of the City's goals and objectives for this important initiative—will help ensure St. Charles' success on this initiative. We focus on developing strategic plans that become an active part of organizational progress. Further, we understand that a strategic plan is meant to serve an organization both in the short- and long-term, and as such, must reflect a shared vision for what stakeholders decide together and guide activities that help ensure that vision is achieved. We will work closely with the City and its stakeholders to fully understand its culture and the full scope of its current environment; identify strategic goals, objectives, tactics, and resources; develop measureable, desired outcomes; and outline the actions necessary to help ensure the City gets to where it wants to go.

We are excited at the prospect of partnering with the City as it seeks to achieve its vision for the organization—as well as the stakeholders it serves—and appreciate the opportunity to contribute to the City's bright future.

4.2 Work Plan

Strategic Planning Techniques and Methodologies



Our project team will engage the City's elected and appointed officials, staff, businesses, community, and other stakeholders in ways that will maximize creativity and innovation and inspire collaboration and consensus for achieving its vision. We will help develop a City of St. Charles Strategic Plan that can reasonably be implemented with support and commitment from its stakeholders. A quality strategic plan defines the organization's reason for being, establishes a clear and compelling vision, sets measurable objectives, and, most importantly, lays out the desired impact on and value-add to the community, businesses, employees, and other stakeholders.

Achieving Consensus and Quickly Moving Groups to Action

We will design and conduct a well-facilitated strategic planning process that uses data and personal knowledge to assess the City's environment. Our project team will use the ICA ToP® facilitation methodology to help ensure the City's strategic planning sessions are highly collaborative and inclusive of all stakeholders. The ToP® methodology emphasizes structured participation that pulls information into the group's thinking process and creates a clear intention, helping members of the group align with one another and reach consensus. Structured participation encourages the values shown in Figure 5 below.

Figure 5: Values Encouraged by Structured Participation



Encouraging Crossing Boundaries and Strengthening Interdependencies

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

Applying Effective Tools

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

Developing Clear and Compelling Plans That Articulate a Business Case

We will write strategic goals, initiatives, and actions in a common language to evoke a clear picture of success to serve as a useful tool for the City's decision-making. Our project team has facilitated the strategic planning process and written clear, compelling strategic plans for more than 50 public-sector entities and system-level plans involving multiple levels of government, jurisdictions, and agencies. Our clients use these plans to drive budget decisions, execute strategies, and publish the results to communicate with stakeholders and the public.

Focusing on Diversity, Equity, and Inclusion

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



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

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

Figure 6: Social Pinpoint Features



Public Input and Engagement

We recognize that the City has a strong desire to facilitate a strategic planning process that emphasizes public input. We will utilize several strategies to effectively engage and collect data and information from the public, including developing communications, conducting interviews and focus groups, facilitating community visioning forums, and creating an interactive project landing and engagement website via Social Pinpoint.

Social Pinpoint is a customizable community engagement platform that is used to inform stakeholders of project goals, objectives, and progress, and provide opportunities to interact and gather information. This comprehensive tool has several features that we use frequently and as needed throughout strategic planning projects, as illustrated in Figure 6.

Social Pinpoint is a customizable community engagement platform that is used to inform stakeholders of project goals, objectives, and progress, and provide opportunities to interact and gather information. This comprehensive tool has several features that we use frequently and as needed throughout strategic planning projects, as illustrated in Figure 6.

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

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

- City of Creswell, Oregon
- City of Groveland, Florida
- City of Milton, Georgia
- City of Redlands, California
- City of Wausau, Wisconsin
- City of Westminster, Colorado
- Lane County, Oregon

Examples of the City of Wausau’s Social Pinpoint site are provided in Figure 7, below and on the following pages, for further review and consideration.

Figure 7: Social Pinpoint Community Engagement Samples (Idea Wall, Survey, Open Forum)



Take a Brief Survey

1. On a scale of 1 to 5, rate the following "quality of life factors" in Wausau.

We have well maintained outdoor spaces, trails, and parks.

1 - Strongly disagree
 2 - Disagree
 3 - Neither agree or disagree
 4 - Agree
 5 - Strongly agree
 Don't know

It is easy for me to use Wausau's parks, trails, and outdoor spaces.

1 - Strongly disagree
 2 - Disagree

Envision our Future

*More retail outlets (not bars or restaurants) downtown. *Finish the river trail on both sides of the river *More development along the river on the west side *Connect parks with trails and bike routes (ala Stevens Point) *Slow traffic and enforce noise and speed regulations in the city *Provide more assistance to elderly, including free services to fix up deteriorating property so seniors can stay in their homes safely and economically. *Capitalize on flat water canoeing-kayaking opportunitie

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*Vibrant developments on both sides of river. *Revitalized residential neighborhoods in the interior of the city. *Destination summertime recreation opportunities that take advantage of our kayak course and flat water canoeing (you can't rent a canoe in Wausau) *More focus on our museums, botanical garden *Extensive river trail system *More shopping opportunities downtown

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-A city that has developed policies to attract and retain local small businesses. -The Northcentral WI hub for sustainability that will affect entrepreneurs, city planning, green building design, public green space, transportation, and energy efficiency. This focus will also help the affordable housing markets. -A continued pursuit in beautifying the city through parks, pedestrian/bicycle pathways, and building redevelopment.

[Close](#)

Work Plan Narrative

BerryDunn is flexible when it comes to development and execution of an effective work plan. We understand that no two projects are exactly alike, and we believe that **one of the primary reasons we have been successful with similar projects is our willingness to be flexible in adapting to our clients' unique needs.** Figure 8 presents an overview of our approach to the City's strategic planning project.

Figure 8: Work Plan Overview



The overarching benefits the City can expect of our approach include:

- A methodology based on our extensive experience conducting similar projects
- A proven yet customizable work plan to best accommodate the City's specific needs
- Quality assurance processes that incorporate City review and approval of all deliverables
- Built-in project management and change management best practices—focused on keeping the project on time, on budget, and progressing at a healthy pace
- An emphasis on conducting a participatory and inclusive process

Below and on the following pages, we outline our work plan to efficiently and effectively guide the City and its stakeholders through the strategic planning process.

Phase 1: Project Initiation and Planning

1.1 Conduct initial project planning. We will conduct initial project planning with the City's project team to identify project milestones and expectations for stakeholder engagement in the strategic planning process. We will introduce key team members, clarify project goals and objectives, identify known project constraints, and refine dates and/or tasks, as appropriate. We will discuss our approach for managing communications between BerryDunn and the City as well as our approach to scope, risk, and resource management. We will also review possible formats for the final City of St Charles Strategic Plan. These discussions will help us refine our currently proposed Project Work Plan and Schedule.

1.2 Request, compile, and review documents and data. We will request and compile documentation and data to help us better understand the City's current environment and inform engagement activities. Examples include:

Phase 1: Project Initiation and Planning

- Key performance metric data
- Program descriptions and data
- Past internal and external assessments
- Other existing City planning and policy documents, organizational charts, staffing, budgeting details
- Previous surveys of City stakeholders, customers, residents, and staff
- Demographic, economic, and community data and forecasted trends from the U.S. Census Bureau, the U.S. Bureau of Labor Statistics, American Community Survey, U.S. Department of Education, Centers for Disease Control, the Opportunity Index, and other state and local data sources

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

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

▲ Deliverable 1. Project Work Plan and Schedule

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

▲ Deliverable 2. Biweekly Status Meetings

Phase 2: Stakeholder Engagement

2.1 Develop the City's Social Pinpoint site. Given the current environment, we will utilize tools and technology that will help encourage collaboration with the City and its stakeholders. One of these tools, Social Pinpoint, will be customized to reflect the exact goals, needs, objectives, and background for the City's strategic planning project and leveraged to encourage community engagement. We will work in collaboration with the City to help ensure its landing page is built thoughtfully and speaks to its culture. Additionally, within this landing page, City stakeholders will have access to an external survey, idea wall, and other engagement tools that will help gather information related to the City's current environment.

Phase 2: Stakeholder Engagement

2.2 Develop stakeholder messaging and communications. We will develop messaging and communications to build awareness for the process, its intended outcomes, and opportunities for stakeholders to get involved. We will review messaging and communications with the City's project team before finalizing and distributing it.

2.3 Develop stakeholder interview questions and protocols. In order to understand how the City's Mayor, Alderman, Administrator, staff, community, and other key stakeholders view the current environment and issues of strategic importance—and to gather information for the Environmental Scan—our project team will develop questions and protocols to guide individual interviews as well as to incorporate in surveys we develop and the community visioning forums we facilitate. We will review the questions and protocols with the City's project team to build consensus and solicit feedback before updating them to final.

Some of the topics we will address are:

- What current and/or emerging trends have the biggest influence on where the City's efforts and resources should be focused?
- What are the potential scenarios that the City should be prepared for in the coming 2, 5, and 10 years?
- What is the most pressing problem or concern facing the City?
- What is the City's long-term vision for the lives of its residents?
- What are the most important and/or critical community needs the City can address in the near future?
- How effective is the City's existing service delivery and programming in meeting the needs of the needs of St Charles' residents and the community? What service gaps exist, and how should they be addressed?
- What opportunities could more effectively leverage the City's existing plans, efforts, resources, and capacity to achieve better outcomes for residents and businesses in terms of the City's programming, service delivery, and investments across the community?
- What does the City desire to address or accomplish on behalf of its residents and community businesses?

In addition to developing questions and protocols, we will also work with the City's project team to schedule and communicate opportunities to involve appropriate stakeholders and stakeholder groups.

2.4 Conduct individual interviews with the City's Mayor, Aldermen, and Administrator. We will conduct individual interviews with the City's Mayor, Aldermen, and Administrator to comprehensively review and assess City's services and the needs of the community. These interviews will be guided by previously developed questions and protocols. Working individually with the City's leadership will help us establish a foundational knowledge of the City overall and help ensure alignment and cohesion for the City's strategic direction as well as generate excitement, promote consensus and buy-in, and encourage participation and involvement in the process.

2.5 Conduct individual and group interviews with the City's departments and other stakeholders. We will conduct individual and group interviews with the City's stakeholders, including department heads, designated employees, community stakeholders, citizen groups, and others, as appropriate, to comprehensively review and assess City's services and the needs of the community. These interviews will be guided by previously developed questions and protocols. Working with these diverse stakeholder groups, we will help ensure alignment and cohesion for the City's strategic

Phase 2: Stakeholder Engagement

direction as well as generate excitement, promote consensus and buy-in, and encourage participation and involvement in the process.

2.6 Synthesize information gathered and develop an Initial Environmental Scan Draft. We will synthesize information gathered through quantitative and qualitative research, document and data review, Social Pinpoint, and leadership and stakeholder interviews to develop an Initial Environmental Scan Draft. The format of the Initial Environmental Scan Draft will be a highly visual and compelling slide deck and will be used to inform the upcoming community visioning forums and strategic planning sessions. The presentation will provide an overview of the City's current environment; a comprehensive strengths, weaknesses, opportunities, and threats analysis; and discovery outcomes. This initial draft will be presented to the City's project team to solicit input and gain consensus.

▲ Deliverable 3. Initial Environmental Scan Draft

2.7 Prepare for and conduct community visioning forums. Using the ICA ToP[®] facilitation methodology and the Initial Environmental Scan Draft as the basis, we will design a community visioning forum format that is informational, highly-interactive, and engaging for all participants in developing a vision for the City. We will make creative use of digital applications to help ensure forums are engaging and effective. Once prepared, we will facilitate two community visioning forums to gather perspectives and ideas from the community and document the outcomes to inform updates to the Initial Environmental Scan Draft.

▲ Deliverable 4. Community Visioning Forums

2.8 Update the Initial Environmental Scan Draft to final. We will incorporate community visioning forum outcomes in our Initial Environmental Scan Draft. The Updated Environmental Scan will guide and inform strategic planning sessions as well as generate excitement for the process amongst stakeholders, encourage new ideas, and foster a sense of cohesion and optimism for the future.

▲ Deliverable 5. Updated Environmental Scan

Phase 3: Strategic Planning Session Facilitation

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

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

Phase 3: Strategic Planning Session Facilitation

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

▲ Deliverable 6. Strategic Planning Sessions 1 and 2 Documented Outcomes

Phase 4: Strategic Plan, Implementation Action Plan, and Recommended Timeline Development

4.1 Develop the City of St Charles Strategic Plan. We will develop the City of St Charles Strategic Plan Draft in an agreed-upon format for the final document. This plan will include the City's mission, vision, values, strategic goals, objectives, and performance metrics and outcome measures. It will also include an executive summary and the strategic plan development process and a plan and timeline for carrying out the strategic plan internally and externally. The plan will also include recommended future follow-up activities, considerations for action and implementation planning, and the means to evaluate progress. We will review this draft with the City's project team to solicit feedback before updating and preparing it for public review and comment.

4.2 Coordinate a community review process. We will help coordinate a community review process and facilitate an open meeting for the St Charles community to review and comment on the City of St Charles Strategic Plan. We will collect input as a result and incorporate recommended changes as appropriate before updating it for City Council presentation and approval.

4.3 Prepare and present to the City Council. We will present the City of St Charles Strategic Plan to the City Council for review, approval, and adoption. Following the presentation, we will make any requested changes from the City Council before updating the plan to final.

▲ Deliverable 7. City of St Charles Strategic Plan

Optional 4.4 Develop an Existing Objectives Cross-Walk Template. *To help ensure continuity and understanding between the City's existing plan's contents and that of the new City of St Charles Strategic Plan, we will develop an Existing Objectives Cross-Walk Template. This template will be used as a tool in a work session with City staff to align existing objectives to the Council's new Strategic Plan and identify areas that may need additional direction from the City Administrator or City Council.*

▲ Optional Deliverable 8. Existing Objectives Cross-Walk Template

4.5 Develop an Implementation Action Plan Template. Using the City of St Charles Strategic Plan as the foundation, we will develop a template for developing an Implementation Action Plan. Once complete, this template will be reviewed with the City and customized using the City's input. We will then provide the template to the City as a means to begin implementation of the new Strategic Plan and allow for City Council and staff to more easily prioritize objectives.

▲ Deliverable 9. Implementation Action Plan Template

Optional 4.6 Develop an Annual Report Template. *In addition to the Implementation Action Plan Template, we will develop an Annual Report Template. This template will be used to report on the*

Phase 4: Strategic Plan, Implementation Action Plan, and Recommended Timeline Development

City's annual progress towards strategic planning success. It will also be used to document relevant data and prepare for budget planning.

▲ *Optional Deliverable 10. Annual Report Template*

4.7 Conduct project closeout activities. Once the strategic planning effort is complete, we will perform closeout activities, including providing the City with documentation developed and collected during the process, and conducting lessons learned and knowledge-sharing activities. By conducting this task, the City will rest assured that it is equipped to continue progress toward its vision and to successfully implement its plan even after the project is complete.

4.4 Implementation Schedule

Table 1 presents our anticipated timeline by phase for the City's further review and consideration. This timeline was developed based on our extensive experience successfully conducting similar projects and our understanding that the City desires deliverables be provided by October 31, 2022.

We are happy to move at the City's pace by expediting or elongating the process as needed to help ensure optimal involvement, productivity, and success during this work effort.

Table 1: Anticipated Timeline by Phase

	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
Phase 1	[Dark Blue Bar]					
Phase 2		[Light Blue Bar]				
Phase 3				[Light Green Bar]		
Phase 4					[Purple Bar]	

MILTON



STRATEGIC PLAN 2021-2025

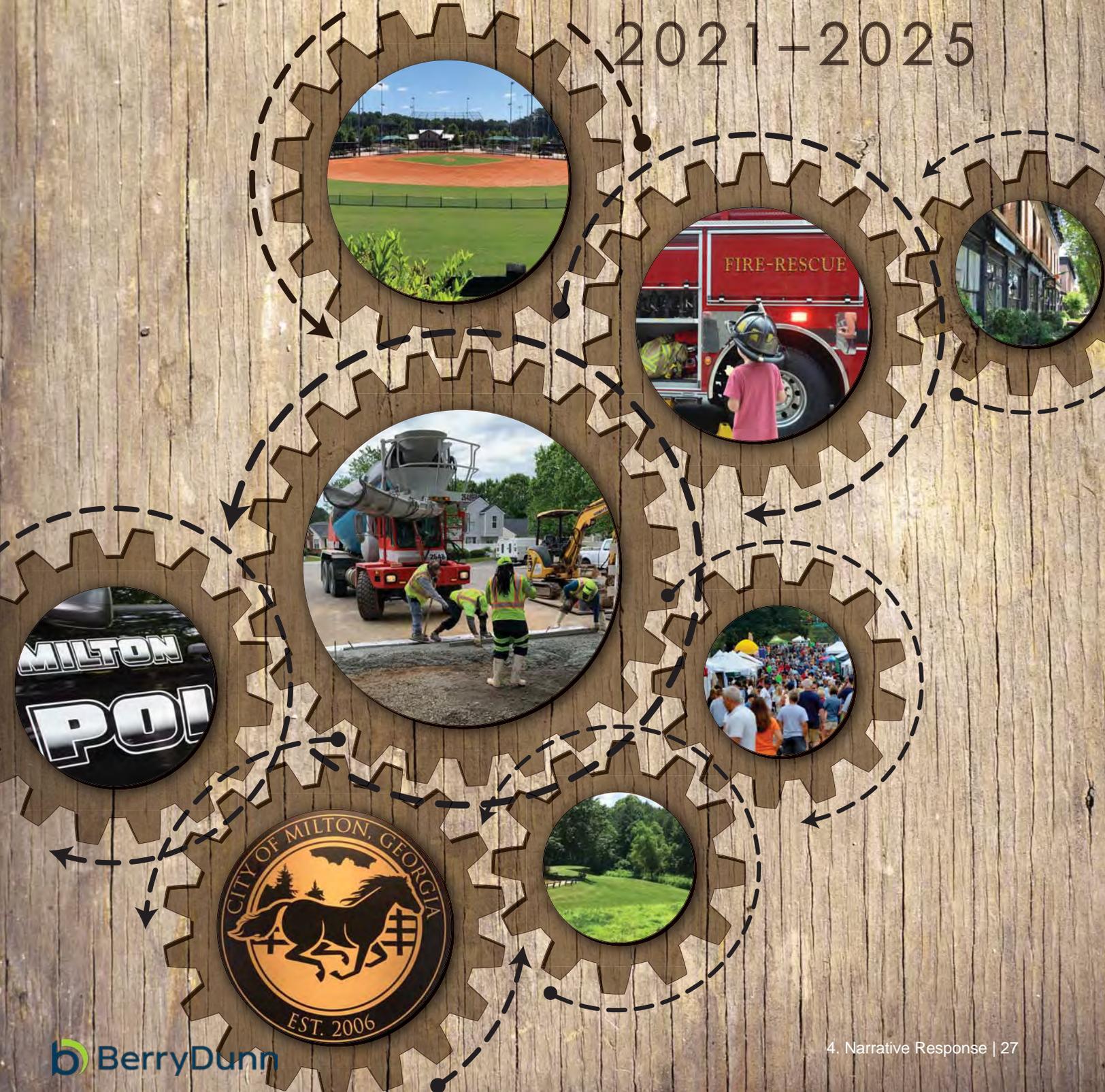
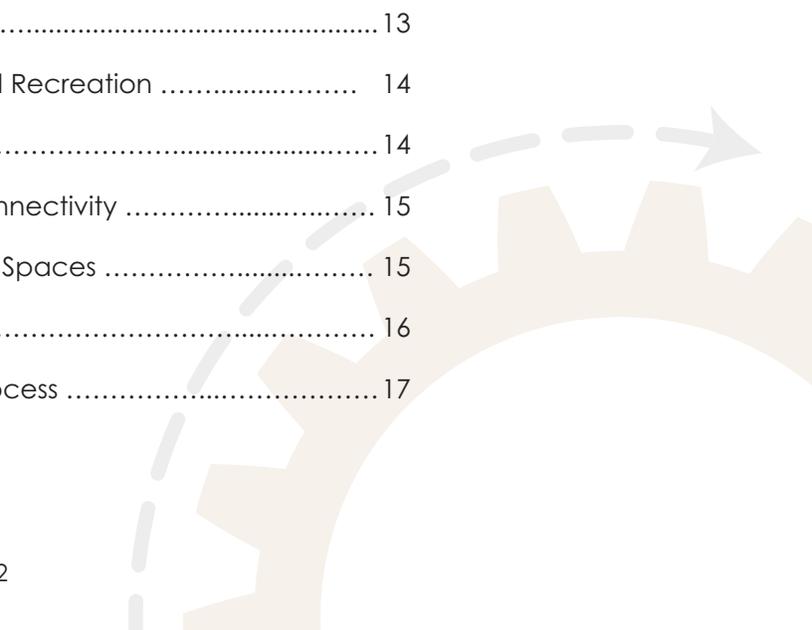




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MAYOR'S MESSAGE



MAYOR

Joe Lockwood

The City of Milton has come a long way since its founding in 2006, when I became mayor. And I cannot wait to see where it goes from here.

This Strategic Plan can be instrumental in laying out ways we can make our community's dream for a better future a reality. But one document alone won't get us there. Our success depends on the details and execution of each initiative born from this Plan. It depends on the diligence and intelligence of City staff members who will drive the actions. And, more than anything, it depends on citizens who help make Milton so special by giving our government direction and support. They are the front-and-center in everything we do – including the creation of this Strategic Plan.

Our citizens deserve a government that constantly looks to improve their lives, reflect their ideals, and plan ahead so Milton's tomorrow is even better than today. That's what this Strategic Plan is all about. Yet it is a starting point, not an endpoint. Our City government will keep listening to our residents, keep coming up with ideas, and keep making progress.

Sincerely,
Mayor Joe Lockwood

CITY COUNCIL



DISTRICT 1/POST 1

Peyton Jamison



DISTRICT 2/POST 1

Laura Bentley



DISTRICT 3/POST 1

Joe Longoria



DISTRICT 1/POST 2

Carol Cookerly



DISTRICT 2/POST 2

Paul Moore



DISTRICT 3/POST 2

Rick Mohrig

LETTER FROM THE CITY MANAGER AND ORGANIZATIONAL CHART



CITY MANAGER

Steven Krokoff

I am honored to share the City of Milton’s Strategic Plan for 2021 –2025 – an inspiring, ambitious document that provides us a framework to meet our community’s needs. Every piece is grounded in our commitment to our vision: “Milton will be a city recognized for its exceptionally high quality of life, strong sense of place and community, and dedication to preserving our rural heritage.”

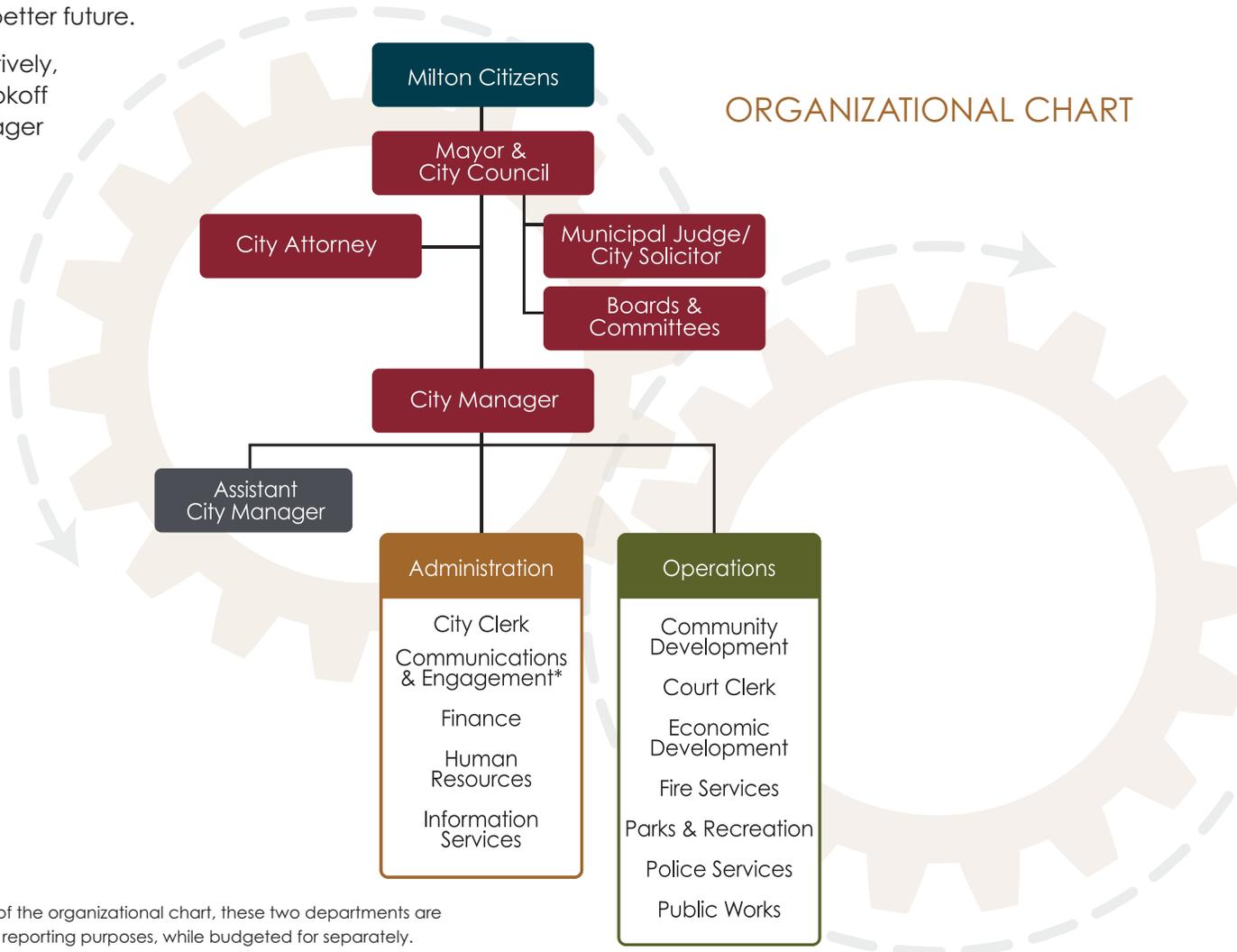
This Strategic Plan resulted from a collaborative, comprehensive process aimed at setting our goals and how we’ll know if we’ve achieved them. After an extensive engagement phase that included feedback from citizens, business owners, committee members, employees, and various stakeholders, our Mayor and City Council members outlined a vision, mission, core values, and strategic priorities for the City of Milton. This Plan will focus our government’s energy and resources, ensure City officials and staff work toward common goals, establish consensus around intended outcomes, and leave room for us to assess and adjust the organization’s direction in a changing environment.

I would like to thank Mayor Lockwood and our City Council for their enduring support and leadership that made this Plan possible. I’d also like to express my appreciation for our community members who participated in various ways such as surveys, public meetings, and stakeholder interviews. A special thank you goes out to our steering committee, including our partners at BerryDunn, who endured countless brainstorming and strategy meetings to make this Plan possible. And finally, I want to thank Team Milton for their unwavering commitment to service as exemplified in the Plan before you.

This is an exciting time for the City of Milton as we build upon past success and, together, lead Milton into an even better future.

Appreciatively,
Steven Krokoff
City Manager

ORGANIZATIONAL CHART



*For purposes of the organizational chart, these two departments are combined for reporting purposes, while budgeted for separately.

PLAN AT A GLANCE

MISSION

We take pride in our responsibility to protect and improve the high quality of life for those we serve.

VISION

Milton will be a city recognized for its exceptionally high quality of life, strong sense of place and community, and dedication to preserving our rural heritage.

VALUES

Together We Thrive

The whole is greater than the sum of its parts. Inclusive collaboration, courageous engagement, diversity of opinion, and a purposeful commitment to continuous personal, professional, and team growth lead to outstanding results.

It's All About Our Rural Heritage

Every step we take protects our rural heritage and culture.

Service Is Our Obsession

Every interaction is an opportunity to show off our commitment to find solutions. We delight the people we serve by going the extra mile to exceed expectations.

Own It, Deliver It

We pursue every opportunity with enduring determination, every project with urgency, and every challenge with creativity. We have an unparalleled sense of pride in and ownership of our accomplishments.

Lead from the Front

We are servant leaders committed to being visible, accessible, and engaged. We walk the talk by setting the example for others to follow.

STRATEGIC PRIORITY #1

Ensure Milton's Sustainability and Resiliency

Current State

Milton provides a *forward-thinking approach* to economic development, critical event preparedness, day-to-day community safety, environmental sustainability, and its transportation network employing an effective and fiscally responsible service delivery framework. A *motivated and flexible staff* has promoted sustainability in many ways. Financially, the City employs a *conservative pay-as-you-go* system. Environmentally, the City has earned *Green Communities* recognition. From a public safety perspective, Milton has established a service and *outreach-oriented fire department*, boasts routinely *low crime* rates, maintains *safe roadways*, and has a strong track record responding to *critical events* (including managing four federally-declared disasters and several smaller incidents over the past 15 years). The foundation for this success has been a *clear vision for the City* established by elected officials, an engaged citizenry, and a highly professional workforce who leverage their individual experiences, knowledge, and diligence to make Milton a vibrant, noteworthy community.

Future State

The City recognizes that sustainability and resiliency are a function of all departments, elected officials, and external stakeholders. They work in concert to form a *cooperative ecosystem* in which *mutually reinforcing government and private sector* activities contribute to a *vibrant and safe* community. Milton envisions a future that builds on this strong foundation to provide nation-leading sustainability and resilience fostered by an engaged government focused on *community partnerships*, *creative funding* methods, and deliberate *efficiency*. We maximize our available resources by building teamwork capacity and through effective government processes. This approach takes full advantage of Milton's commercial nodes – furthering Milton's strong regional reputation as an *outstanding place to do business* – while preserving and enhancing the *rural core* of the city. It also is powered by a *community-reflecting workforce*; utilizes technology, training, and planning to enhance *critical incident management* abilities; ensures that public safety is engaged in the development process, thereby preparing it to meet future community needs while maximizing its day-to-day resiliency; and maintains sound *transportation planning/maintenance*, energy-efficiency, and solid waste programs that enhance the *environmental and social sustainability* of Milton's unique character.



Ensure Milton's long-term financial sustainability

OBJECTIVES

1. Further diversify the City's revenue sources to reduce reliance on property tax revenues and diminish the effects of economic fluctuations
2. Enhance the commercial tax base with businesses that fit into a cohesive, community-driven vision for Milton
3. Establish a financial metrics comparison relative to similar municipalities

OUTCOME MEASURES

- Chart percentage of revenue across different categories, aiming for a higher percentage (relative to total revenues) derived from non-property taxes year over year
- Develop a 5-year financial plan
- Assess the following, aiming for year-over-year stability and/or improvements:
 - Number of new jobs added (trended over a 10-year period)
 - Unemployment rate (as measured against comparable cities)
 - Streamlined/reduced permitting time (as measured against comparable cities and by customer satisfaction)
 - Occupancy rates (as measured against comparable cities)
- Occupational tax process and fee structure updates completed by December 31, 2022



Ensure Milton's readiness and preparedness to respond to disasters as well as unusual or critical events

OBJECTIVES:

1. Develop cross-disciplinary systems that can respond to unanticipated emergencies, including specialized training and the leveraging of suitable technology
2. Identify and plan for natural and manmade disaster mitigation opportunities and recovery needs
3. Develop, with Milton's partner cities, a seamless integrated plan (including training) to respond to hostile events

OUTCOME MEASURES:

- 100 percent of identified City staff members receive basic ICS training by December 31, 2021
- Complete identified advanced emergency management training for appropriate staff members by December 31, 2023
- Conduct advanced level emergency management drills for five consecutive years starting in 2021
- Show improvement on interdepartmental cooperation according to the HSEEP model, evaluated in 2021 and again in 2025 (year 1 and year 5 of this Plan)
- Forge five new community partnerships that will support the City in response and recovery by 2025
- Produce a different resilience-themed community education campaign each quarter during the full course of this Strategic Plan
- Fully implement a continuity of operations plan (COOP) by the end of 2022
- Establish and train an Incident Management Team with Milton, Roswell, Alpharetta, and Fulton County Schools representatives by 2023 while showing improved inter-entity cooperation according to the HSEEP model, as evaluated in 2023 and 2025 (year 3 and year 5 of this Plan)





Protect and preserve Milton's environment through sound land use, environmental stewardship, green infrastructure, and sustainable practices

OBJECTIVES:

1. Identify opportunities to improve the management of solid waste collection that aligns with sustainable best practices
2. Prioritize and fund environmental initiatives that will make Milton a better place today and tomorrow

OUTCOME MEASURES

- Increase recycling alternatives – in terms of ease of recycling and the types of items that can be readily recycled – for Milton residents, as measured year-over-year
- Improve in Green Communities certification from bronze to silver by the end of this Plan
- Year-over-year increases in the amount of environmental signage and kiosks in greenspaces, parks, and other City properties
- Forge a partnership with Georgia Audubon to conduct a “bird audit” and make recommendations for a bird-focused environmental initiative
- Establish a baseline EPA mileage average for City vehicles by the end of 2021 and consistently improve that number year-over-year within the City vehicle fleet
- Increase the number of electronic vehicle charging stations on public and private property in Milton, with 5% growth by the end of this Plan



Maintain a secure community in which people can live, work, and play safely

OBJECTIVES:

1. Deliver effective, efficient emergency and nonemergency services to minimize fatalities, severe injuries, and loss
2. Identify and prioritize notable risk-threat hazards in Milton, develop a strategy to reduce their potential harm, implement this strategy, then evaluate its impact
3. Establish a sustainable Safety Crisis Intervention Team (SCIT) within the Police Department to collaboratively, efficiently, and effectively respond to crises
4. Rebrand the Milton Fire Department's Community Paramedicine program – expanding its scope, mission, and service to citizens
5. Create a joint fire-police task force (in partnership with outside providers) to respond to critical events, address non-emergency social services, and take a holistic look at community needs

OUTCOME MEASURES:

- Explore accreditation for Milton's Fire Department through the Center for Public Safety Excellence by December 31, 2021
- Reduce wait times for emergency response services in the Milton Fire-Rescue Department by meeting the “first alarm assignment” benchmark to 50% of the time by the end of this Plan
- Improve response times to emergency calls in all zones by 10% by the end of this Plan (relative to 2021)
- Develop and deploy annual scenario-based de-escalation and crisis intervention training for all Milton police officers by December 31, 2022
- Conduct an initial hazards analysis by December 31, 2021, then reassess annually to increase by 5% year-over-year target police/fire public education programs aimed at resiliency/prevention
- Establish a functional Safety Crisis Intervention Team (with 100% CIT-trained staff) by December 31, 2023



- Identify several police officers per shift for advanced training on crisis response and mental health services by December 31, 2023
- Develop an expanded, repurposed operational mobile health response unit (tentatively to be called Milton C.A.R.E.S) by December 31, 2022
- Conduct an initial assessment of community needs that might be served by a mobile health unit by December 31, 2021; develop a comprehensive policy within the Fire Department to address those needs (including health and safety engagement) by December 31, 2022
- Create a joint fire-police task force and conduct initial drill/training by the end of this Plan



Implement a transportation infrastructure that meets current needs, accounts for future growth, and allows residents to traverse Milton in a calm, safe, efficient manner

OBJECTIVES:

1. Alleviate traffic congestion to reduce travel time and traffic speed throughout Milton
2. Improve conditions for walking and cycling throughout the city

OUTCOME MEASURES

- Complete Local Road Safety Plan with executable strategies by December 31, 2021
- Improve stakeholders' satisfaction with transportation in Milton as measured by a regularly conducted survey
- 5% year-over-year decrease in vehicular-related property damage (using 2021 as a baseline given abnormally reduced traffic in 2020 due to the COVID-19 pandemic)
- 5% year-over-year decrease in vehicular-related personal injury and fatal crashes (using 2021 as a baseline given abnormally reduced traffic in 2020 due to the COVID-19 pandemic)
- Deploy a bicycle safety initiative by December 31, 2022
- Ensure effectiveness of intersections does not decrease below level D in the Comprehensive Transportation Plan over each of the next five years
- Establish plan to analyze and develop a means to reduce "red lines" (as seen in widely used mapping software, like Waze) in Milton traffic by December 31, 2023; begin implementing such a plan by December 31, 2024
- Create a baseline on the extent of "walkability" in Milton by contracting for a walkability study by December 31, 2022
- Establish plans for connections to Big Creek Greenway December 31, 2021



Cultivate a diverse, engaged, and healthy workforce dedicated to service and excellence

OBJECTIVES:

1. Provide continuous development of all Milton staff so that skills and competencies are strengthened, work quality increases, and the City becomes a learning organization
2. Create an inclusive work environment where a diverse group of employees and contracted service members form a team that are considered full partners in the delivery of high-quality programs and services
3. Strengthen the on-boarding and leadership competencies of those serving on City boards and commissions, as well as in volunteer leadership roles
4. Attract and retain a first-rate workforce that is more closely reflective of the community's diversity and prepared to lead into the future
5. Enhance the wellness program to support City of Milton employees' physical and emotional fitness and well-being



OUTCOME MEASURES:

- Conduct engagement and satisfaction surveys for City employees (measured through a customized climate/culture survey or the Gallup Q12) to create baseline measures, followed by incremental year-over-year improvements
- Year-over-year increases in the percentage of employees achieving their documented professional growth objectives
- Establish a baseline in 2021, then annually increase the percentage of employees seeking training and mentorship for career advancement
- Conduct survey to establish baseline, then create and accomplish year-over-year goals that attest to contracted service providers having a positive work environment and providing quality services
- Establish an onboarding plan for all board and commission members, as well as those in other volunteer leadership roles by December 31, 2021
- Reduce accidents and workers compensation claims by analyzing baseline data from 2020, then implement plans to reduce the number of incidents, year-over-year, through the end of this Plan
- Year-over-year progress toward goal of making City of Milton's workforce more reflective of the community's demographics
- Year-over-year increases in the percentage of Milton staff taking advantage of benefits (and to what degree)
- 20% year-over-year increases in wellness program offerings available to City staff



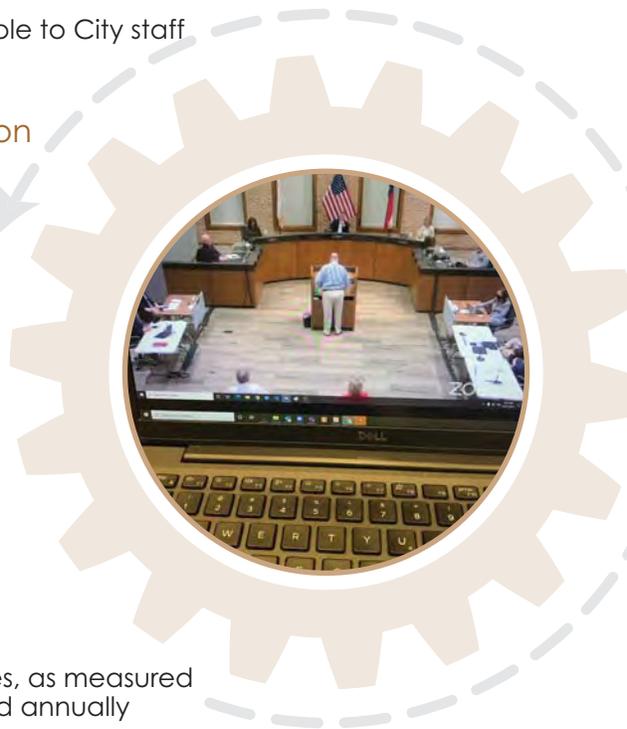
Enhance the effectiveness of the City's information technology to promote efficient operations and customer-oriented service delivery

OBJECTIVES:

1. Increase the reliability of technology support to the organization through technology service reporting, domain migration, and the enhancement of a disaster recovery plan
2. Establish a plan to create an intranet for City employees by December 31, 2021
3. Enhance the system for inventory management and "lifecycle" replacement of the City's hardware by December 31, 2021
4. Increase transparency through digital accessibility to City records, resources, and services

OUTCOME MEASURES:

- Increase in City staff satisfaction with technology tools and services, as measured through a customized work climate/culture study to be conducted annually
- Complete domain migration to miltonga.gov by June 30, 2021
- Earn a major national IT award (through GovTech, ICMA, Gartner, or Center for Digital Government Innovation Award/GCN) by December 31, 2025
- Complete an intranet plan by December 31, 2021
- Have a fully functioning intranet by December 31, 2022
- Institute IT Glue (or something similar) for inventory management and "lifecycle" planning by December 31, 2021
- Establish a fully functioning Laserfiche public portal by December 31, 2021
- Re-establish publicly available GIS mapping by June 30, 2021
- Increased community satisfaction with the City's website, as measured periodically through the ICMA National Citizen Survey
- Increased ratings on municipal website transparency as measured through a generally accepted measurement tool, with 2021 set as the baseline and a follow-up assessment in 2023



STRATEGIC PRIORITY #2

Continue Smart Land Planning to Keep Milton Unique

Current State

The City of Milton is distinguished as an *iconic rural community* developed around a crossroads-style town center with *low-intensity commercial nodes*. This agrarian character has been achieved by maintaining an *aesthetic balance* of well-maintained subdivisions scattered amongst the open and rolling hills of quaint equestrian farms. Residents enjoy a rural, *peaceful setting* without compromising easy access to high-end shopping, quality professional services, and excellent restaurants. This has resulted in *high land values*, which entices large lot landowners to consider selling to the subdivision development community. Over time, this *threatens to disturb the balance* of subdivisions to equestrian farms and large lots threatening to erode the rural, *visual character* central to Milton's brand.

Future State

The City of Milton is a *thriving community* steadfastly committed to its long-term comprehensive *land use plan*. Our dedication to *smart development* is evident in areas identified for specific growth and incorporating *design elements* that reflect our rural, peaceful nature and charm. Milton's *special character* – as reflected in its bucolic pastures, modern rustic architecture, and walkable commercial districts – is *identifiable* as soon as you enter the city. The City's *equestrian brand* is integrated into the commercial nodes to re-emphasize Milton's sense of place and unique identity. Milton is nationally recognized as a "location of choice" for small and medium equestrian hobbyists, which reflects a desire for the *equestrian farm lifestyle*.





Establish Milton a location of choice for equestrian hobbyists and preserve the farm lifestyle that contributes to the City's unique sense of character and place

OBJECTIVES:

1. Explore the establishment of equestrian character area zones around Milton
2. Identify and encourage equestrian lifestyle, heritage, and visitor experiences
3. Establish a national marketing campaign to promote Milton's equestrian lifestyle
4. Establish Birmingham Park as an equestrian destination
5. Offer incentives and increase/reduce regulations that make it easy to build and maintain a farm
6. Attract complimentary goods and services for equestrian/agricultural operations to Milton

OUTCOME MEASURES:

- Milton is listed/recognized nationally as one of the top places for recreational/hobby equestrian hobbyists by December 31, 2024
- Establish baseline of agricultural properties segmented by size and set achievable goals by December 31, 2021
- Establish a baseline of satisfaction within the equestrian/agricultural community for goods, services, support, and available experiences by December 31, 2022



Enhances the city's commercial nodes and character areas while maintaining the rural charm that makes Milton special

OBJECTIVES:

1. Stop sprawl from eroding Milton's distinctive rural look and feel
2. Interweave the City's architectural standards with its land use plan to preserve Milton's unique character
3. Integrate equestrian branding into the City's commercial nodes through signage, names, gateways, and architectural elements to emphasize Milton's sense of place and identity

OUTCOME MEASURES

- Increases year-over-year in the percentage of large lot subdivisions as a percentage of overall subdivisions created during a given period
- Increased citizen satisfaction with the City's land use policies and decisions (as measured periodically by the ICMA National Citizen Survey)
- Milton becomes a regional leader in land development practices as evidenced by positive publicity in regional publications by December 31, 2022



STRATEGIC PRIORITY #3

Acquire, Manage, and Develop Public Land and Resources To Support Milton's High Quality Of Life

Current State

The City of Milton offers *recreational opportunities* available that support our high quality of life. Whether it be attending *special events*, *walking* to schools and activity centers, *riding your horse* on stunning passive park trails, volunteering at one of our inclusive special needs *camps*, or attending a youth lacrosse game, there's a unique, strong sense of place and community in Milton. Milton's rural character is put on display whether you're driving by the hundreds of acres of beautiful *nature preserves* (the purchases of which voters strongly supported) or enjoying the "small town farm feel" evident at Milton's premier athletic complex, *Bell Memorial Park*. These great amenities and offerings do not come without challenges. According to national standards, Milton's young, yet growing Parks and Recreation Department underserves our citizens stemming from a *shortage of facilities*. The existing network of *sidewalks and trails* do not serve all transportation needs, though plans are in motion to prioritize meaningful, more widespread access to destinations. Regardless of deficiencies, we continually *collaborate as a team* and with the community to explore creative ways to keep our *citizens engaged*.

Future State

The City of Milton has a *vast array of recreational opportunities* that greatly contribute to our quality of life. Our *active park space* and program offerings are consistent with demand and expectations. Regardless of one's ability, we continue to strive to ensure that our *programs and facilities are inclusive*.

The City's *passive parks* have become a favorite with Milton's citizens, including *locations geared toward equestrian* enthusiasts.

Our *greenspaces* are an oasis for citizens to enjoy the beauty of nature. The City's sidewalk and trail network is built-out according to our *designated trail priorities*, giving families opportunities to *safely* travel, experience the *outdoors*, and enjoy what Milton has to offer.





Develop and maintain active park spaces and facilities where all Milton residents can enjoy recreational opportunities

OBJECTIVES

1. Better leverage current parks and partnerships to increase recreational opportunities
2. Address needs of low-income families by offering a financial aid program for recreation programs
3. Analyze needs, acquire land, and develop programming in underserved parts of Milton per the 2027 Comprehensive Parks and Recreation Master Plan
4. Identify and offer opportunities for new recreation programs that meet citizens' needs and expectations

OUTCOME MEASURES

- Establish a baseline for utilization rate of parks and recreation facilities, then increase that utilization rate year-over-year
- Increased community satisfaction of parks and recreation facilities and programming as measured periodically through the ICMA National Citizen Survey and/or surveys coordinated by program providers
- Year-over-year increases in community participation in Parks and Recreation activities, as measured in the number of individuals enrolled in City-affiliated programs
- Establish a scholarship program for recreational programs based upon generally accepted guidelines
- Year-over-year increases in available active indoor recreation space (as measured in total square footage)
- Year-over-year increases in active outdoor park and recreation space (as measured in total acreage)



Enhance existing passive parks to promote and preserve Milton's natural beauty for the enjoyment of all residents

OBJECTIVES:

1. Create plans to enhance Birmingham Park for equestrian use by December 31, 2021
2. Phase in the Providence Park Master Plan to improve Providence Park as identified in the City's Capital Improvement Plan
3. Add aesthetically pleasing, informative, educational signage at City-owned natural areas and habitats
4. Phase in the plan to improve the former Milton Country Club

OUTCOME MEASURES:

- Increased space and trails for equestrian activity by December 31, 2025
- Increases in community satisfaction with passive park spaces as measured regularly in ICMA National Citizen Survey and/or other surveys
- Implement significant improvements to transform Birmingham Park into more of an equestrian destination by December 31, 2025
- Open bathrooms, pier, and new trail in Providence Park by December 31, 2021
- Open first trails in former Milton Country Club by October 31, 2021





Improve mobility networks to create a more connected Milton

OBJECTIVES:

1. Connect neighborhoods, character areas, retail nodes, and open spaces in accordance with the Milton Community Trail Prioritization Plan
2. Create interactive maps, trail heads, standard signage and markers, and public education campaigns that show how to access Milton's trail and bike system
3. Create a standing Trails Advisory Committee to help prioritize and guide the build-out of Milton's trail system
4. Implement plans for multi-use (i.e. walking, biking) connections to the Big Creek Greenway
5. Establish an "Adopt-a-Trail Program" to assist with the City's trail system maintenance
6. Identify roads with high frequency of bicyclists and create routes that allow safe bicycle travel throughout Milton

OUTCOME MEASURES

- Increases in community satisfaction with Milton's trail system, as measured periodically in the ICMA National Citizen Survey and other surveys
- Establish a baseline and then target for the number of families connected to businesses and activity nodes via a continuous network of trails; increase the number of connected families by December 31, 2025
- Develop an interactive trail map to feature on the City's website, then increase the number of visits to that trail webpage by December 31, 2025
- Explore the measurement of foot traffic on city sidewalks and trails by December 31, 2024



Facilitate and promote the use of public spaces for arts, culture, and events that make people feel welcome and connected with our community

OBJECTIVES:

1. Explore adding an outdoor performing arts space/venue
2. Explore the addition of more public art to parks and community spaces
3. Distribute community spaces so there is more equitable access throughout Milton
4. Create technologically interactive spaces
5. Explore the creation of an "Adopt-a-Roundabout" program for citizens to further beautify roundabouts around the city

OUTCOME MEASURES:

- Establish a baseline of residents' satisfaction with the City's community spaces (as measured in the ICMA National Citizen Survey and/or other surveys), then produce a notable increase in satisfaction by 2025
- Year-over-year increases in the number of households that are within half mile of a community space
- Year-over-year increases in technologically interactive spaces on Milton properties





Protect and enhance Milton's greenspaces to maintain the natural beauty of the city for present and future generations

OBJECTIVES:

1. Identify and establish the appropriate use of each existing City-owned greenspace
2. Create signage and educational components for trees and habitats
3. Explore opportunities for the City to acquire more greenspace
4. Create interactive maps, trail heads, standard signage and markers, and public education showing how to access Milton's trail and bike system

OUTCOME MEASURES

- Complete a greenspace plan/strategy by March 31, 2022
- Year-over-year increases in signage and other educational components at City-owned greenspaces and parks
- Identify opportunities to acquire/add more City-owned greenspaces
- Incorporate greenspaces into Milton's interactive maps, trail heads, standard signage and markers, and public education programs



MILESTONES

This Strategic Plan is scheduled to extend five years, charting a step-by-step course for Milton to get from where it is now to where it wants to be. Yet it took considerable time to come together through dozens of interviews, thorough analysis of myriad documents, laying out detailed plans, and much more.

Here are milestones along the way...



SPRING/SUMMER 2020
City searches for consultant for "strategic planning services"

AUGUST 3, 2020
Council OKs contract with Maine-based BerryDunn to partner with City

SEPT. 17-OCT. 5, 2020
City employees take survey to assess current state of Milton, look to future

SEPT. 21, 2020
Council approves FY2021 budget with \$200,000 for Strategic Plan initiatives



SEPT. 28-OCT. 30, 2020
Diverse group of community 'stakeholders' interviewed

NOV. 17-DEC. 14, 2020
'Social Pinpoint' site – including survey and "Ideas Wall" – open to public

DECEMBER 1-3, 2020
Interactive virtual 'Community Visioning Forums' held with engaged residents

JANUARY 5, 2021
Mayor, Council members attend off-site work session focused on Strategic Plan



FEBRUARY 8-19, 2021
City leaders work out specific goals, objectives aimed at moving Milton forward

MARCH 8, 2021
City Manager Steve Krokoff presents draft plan to, solicits feedback from Council

MARCH 15, 2021
After a presentation, Council unanimously approves 5-year Strategic Plan

City of
REDLANDS
STRATEGIC PLAN
FY 22 - 23 through FY 27 - 28



REDLANDS

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FY 22 - 23 through FY 27 - 28

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REDLANDS

MAYOR'S MESSAGE



Redlands Strategic Plan
FY 22 - 23 through FY 27 - 28

The City of Redlands, its elected officials, its management team and its employees take seriously the stewardship entrusted to us for the City's resources along with the City's rich history and the promise of a bright future.

This strategic plan is an essential tool in understanding who we are, who we want to be and – importantly – how we get there! But a plan alone won't get us anywhere. It is only a starting point. Its success depends on all of us working together – City Council, City staff and our residents – to implement the plan, report and evaluate its progress and make the adjustments necessary to continue moving the City of Redlands forward.

I want to thank my City Council colleagues for their thoughtful vision for our future and City Manager Charlie Duggan and the Executive Team, as well as the consultants from BerryDunn for taking that vision and creating this living document.

And I want to thank you, the residents, for participating and sharing your dreams and aspirations for what Our Town is and all that we can be.

Sincerely,

A handwritten signature in black ink that reads "Paul Barich".

Mayor Paul Barich



Paul Barich
MAYOR

City Council

The City Council is dedicated to responding to the changing needs in our community and to ensuring that Redlands remains a distinctive place in which to live and work. The City of Redlands is a general law city incorporated in 1888. It is governed by the City Council/City Manager form of government. The City Council consists of five representatives chosen by district by the electorate. The Mayor and Mayor Pro Tempore are then elected by the Council. The Mayor and Council set policy, enact legislation, and adopt the budget under which the city operates. The City Manager, appointed by the Council, is the chief administrator of the City.



Eddie Tejada
MAYOR PRO TEM



Denise Davis
COUNCIL MEMBER



Jenna Guzman-Lowery
COUNCIL MEMBER



Mick Gallagher
COUNCIL MEMBER

REDLANDS

LETTER FROM THE CITY MANAGER



Redlands Strategic Plan
FY 22 - 23 through FY 27 - 28

Dear Citizens of Redlands

I am proud to present the City of Redlands six-year Strategic Plan for FY 2022-23 through FY 2027-28. More than a blueprint for City operations, this Strategic Plan is an aspirational endeavor for the future of Redlands and a framework for achieving our vision for the community: “a connected, conscientious, safe community with a small town feel in which all people and businesses can thrive.”

While your City government continues with a clear focus on delivering excellent service each and every day, this document represents our commitment to work at a higher level of operation to expand and achieve Redlands’ full potential.

This Strategic Plan resulted from a collaborative process that engaged our community. We invited you, our residents and businesses, to let us know how we are doing, to share your ideas and to envision the future of Redlands. We reached out and met with a wide array of community stakeholders, including residents, community organizations and service clubs, business groups, educators, faith-based communities and churches, minority groups, youth organizations, labor groups as well as our own advisory boards and commissions and City staff.

We took what we learned from all of you and presented those findings to our City Council, who honed in on the vision and goals for the City and guided this effort to outline a mission, a vision, core values and strategic priorities. This plan is a living document that will focus our energy and resources, ensure that City officials and staff are working toward common goals, establish consensus around intended outcomes and allow us to regularly assess and adjust the organization’s direction in a changing environment.

I would like to thank Mayor Barich and the City Council for their support and leadership in this process. I would also like to recognize the members of the City’s Executive Leadership Team for their thoughtful and conscientious contributions to this plan. Finally, I would like to recognize our steering committee and our partners at BerryDunn who participated in countless meetings and approached the project with diligence and seriousness of purpose and a healthy dose of good humor.

In Redlands, we realize that by stretching ourselves we reach new levels of excellence. We also realize that striving to be perfect, although unachievable, can still be a useful target which prompts us to ask “What are we doing on our journey toward perfection?” This plan represents the next step on that journey.

Sincerely,

A handwritten signature in cursive script that reads "Charles M. Duggan Jr.".

Charles M. Duggan, Jr.



Charles M. Duggan Jr.
CITY MANAGER



REDLANDS

MISSION, VISION AND VALUES



Redlands Strategic Plan
FY 22 - 23 through FY 27 - 28

Mission

“Providing superior services to elevate the quality of life, to cultivate community and encourage a thriving economy while preparing for the future.”

Vision

“In Redlands, we envision a connected, conscientious, safe community with a small town feel in which all people and businesses can thrive.”

Redlands City Values

We strive for excellence and are innovative

We aim to deliver the best service possible and measure quality outcomes and results.

We strive to exceed expectations and to bring out the best in each other.

We are flexible and adapt to the ever-changing needs of our community.

We seek traditional as well as non-traditional solutions and embrace creativity.

We are fiscally responsible

We take seriously financial stability and our stewardship in carefully managing and constantly ensuring the best use of all public funds and other resources.

We seek sustainability

We pursue sustainability as the key to optimal use of all resources.

We measure progress through improvement to the health and well-being of our residents, environment, and local economy.

We are responsive

As public servants **we** exist to serve Redlands citizens and to exceed expectations. That is and should always be **our** constant focus.

We listen, are empathetic and take appropriate action.

We pursue good and timely solutions, and are alert to modifying strategies in response to unintended consequences.

We are fair, honest, and act with integrity

We align our values, words and actions.

We are honorable, trustworthy and sincere.

We consistently go not just beyond the legal minimum to do what is right, but strive for the highest moral and ethical behavior.

We are accountable and make sound decisions based on clear rationale

We take responsibility for our decisions and actions.

We are accountable to our community and to each other so that future generations will have as many opportunities available to them as we do today.

We encourage and practice servant leadership.

We treat everyone with respect

We acknowledge the dignity of every employee, citizen, resident, and visitor in our City.

We work actively to eliminate barriers to full participation in community life.

We conduct City business with courtesy, civility, and respect.

We embrace diversity and inclusiveness

We value the strengths that result from varied experiences, ideas and perspectives.

Our collective histories, both employee and citizen, and natural setting create the fabric that makes Redlands a special place to live, work, and play.

We communicate openly, clearly and frequently

We seek shared understanding with our community and across City organizations.

We are engaged and our interactions are meaningful.

We engage in participatory governance and transparent processes.

We strive to create a culture of collaboration that encourages innovation, sharing of resources, and jointly shared accountability for results.

We take pleasure in the work we do

While maintaining a professional environment, **we** recognize the importance of building and maintaining an enjoyable workplace that will attract and retain employees.

We value a sense of humor and remember not to take ourselves too seriously.

REDLANDS

MULTI-YEAR STRATEGIC PRIORITIES



Redlands Strategic Plan
FY 22 - 23 through FY 27 - 28

A Quality of Life

PRIORITY Ensure Redlands continues to be a vibrant community that honors its heritage and provides a broad range of opportunities to live, work and play.

B Public Health and Safety

PRIORITY Enhance services and programs so that all community members are safe, sheltered and have access to Redlands' core services.

C Equity and Inclusion

PRIORITY Cultivate wide-ranging community engagement and a work force that strives to ensure everyone in the community has access to City services and facilities.

D Sustainability

PRIORITY Preserve and protect what makes Redlands special by maintaining core services, infrastructure and community values.





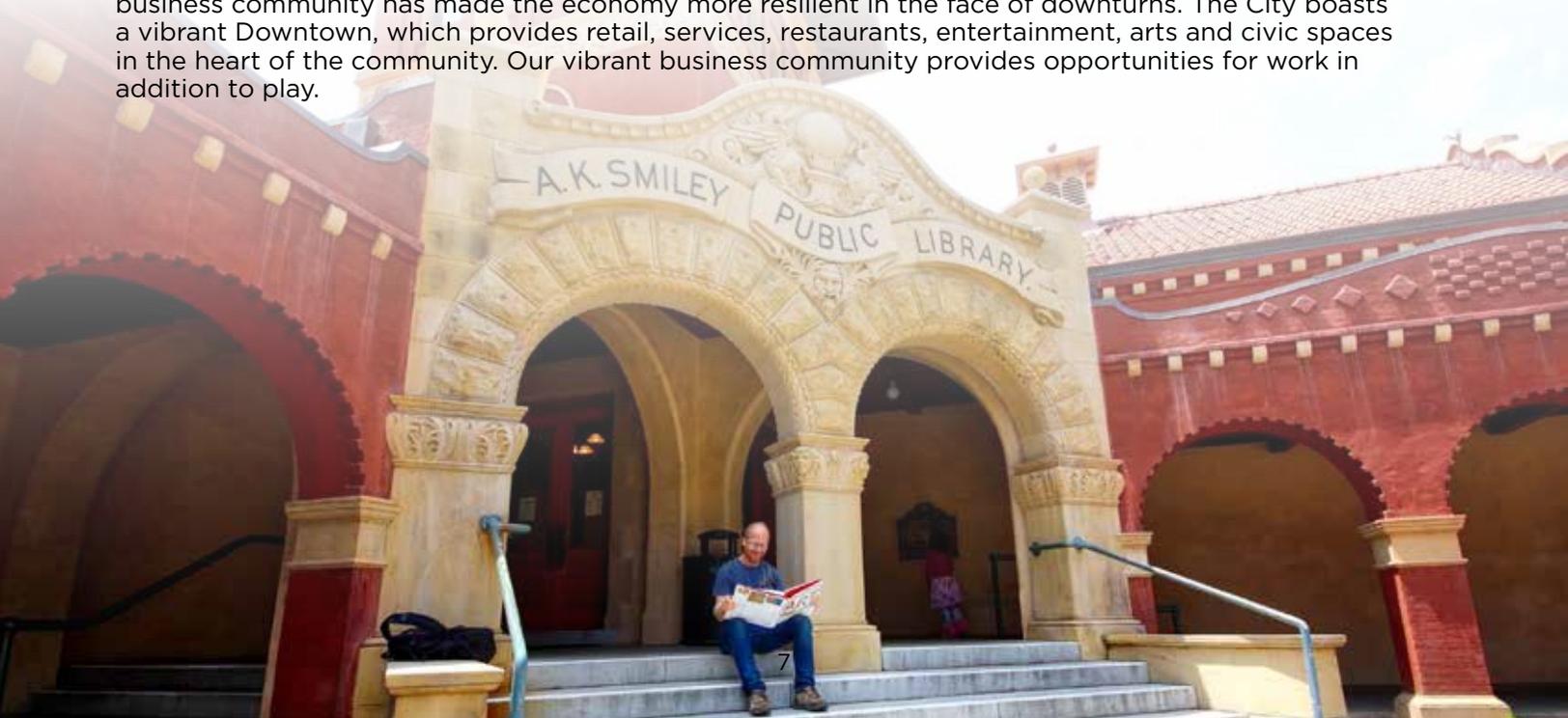
Current State

Redlands is imbued with a cultural richness that comes from its historical background, its social diversity, an active contemporary art scene and a varied business community that consists of retail, entertainment, manufacturing, health care, education, technology and logistics. The City's physical setting, iconic architecture and citrus heritage have all contributed to the community's development in ways that are evident in its historic districts, characteristic structures and neighborhoods, its greenbelt and working private and municipal citrus groves. The community's long tradition of celebrating arts and culture remains strong through its festivals— such as the Redlands Bowl Summer Music Festival, Redlands Theatre Festival and Redlands Art Festival—and the eclectic public art that documents its history of agriculture, commerce, architecture, creativity and civic pride.

Redlands' unique pride of place is exemplified by the many philanthropic contributions to the community including the A. K. Smiley Public Library, the Redlands Bowl, Heritage Park, Lincoln Memorial Shrine and many others. Redlanders also take pride in their community and the distinct neighborhoods that define the City. Redlands' history remains strongly visible in the form of mature street trees, citrus groves and exquisitely detailed historic buildings. Many Redlands residents feel strongly about preserving the community's rich agricultural heritage and architectural character. There are some physical challenges to unity in the city: sections of the community are divided by Interstate 10 and Highway 210, which contributes both in fact and in perception to a lingering north/south division with roots in historic cultural, racial, ethnic and economic factors. With the City's active civic cultures, residents are interested in creating more opportunities to nurture a stronger and more cohesive community, embracing diversity and social interaction, and ensuring that a physical and cultural environment with ample gathering places and community-wide events exists to foster these qualities. Residents want to embrace the qualities that make their neighborhoods special—including landmarks, art, cultural events, gathering places, activity centers, as well as the size, scale, and architectural features of buildings—in order to preserve and strengthen their identities. Community members seek stronger linkages between neighborhoods to ensure that no part of the community feels isolated or neglected and that the entire City is connected as a whole.

Redlands provides opportunities to promote the health of its residents with its park and trail system, its recreational areas, and community centers that help promote active lifestyles for residents of diverse ages and abilities. The Redlands community takes advantage of these features to organize events such as A Run Through Redlands, the Redlands Bicycle Classic and the Believe Walk that provide opportunities to enjoy the outdoors and socialize with fellow residents.

The City has charted a path of fiscal responsibility while expanding services to its residents. It has embraced technology to improve efficiency in delivering those services. The diversity of Redlands' business community has made the economy more resilient in the face of downturns. The City boasts a vibrant Downtown, which provides retail, services, restaurants, entertainment, arts and civic spaces in the heart of the community. Our vibrant business community provides opportunities for work in addition to play.





Future State

Redlands recognizes the importance of preserving our community's rich agricultural heritage and architectural character. The City is committed to the preservation of our historic citrus groves. We continue to protect and value our historic districts, distinctive neighborhoods and the philanthropic contributions throughout our community. Redlanders believe in nurturing a stronger and more cohesive community that embraces diversity and social interactions. The City has enhanced community-wide events that reflect Redlands' diversity and shifting demographics. Redlands is a cohesive and connected community that surpasses physical barriers. The community is unified and provides opportunities that consider all cultural, racial and socio-economic factors in order to provide access and opportunities to our diverse residents and businesses. Redlands' improved parks and open spaces provide accessible opportunities for everyone in the community to enjoy trails, parks and an active, healthy lifestyle. Our business community is vibrant, diverse and resilient and provides opportunities for residents to live and work right here in Redlands.





Ensure Redlands continues to be a vibrant community that honors its heritage and provides a broad range of opportunities to live, work and play.

Strategic Objectives

1. Beautification, Arts and Culture

- Enhance community events to better reflect Redlands' diversity and demographics.
- Create a strategic vision for the arts within the community.
- Ensure that the Redlands Bowl remains a vibrant cultural centerpiece for the City by updating and modernizing Bowl facilities.
- Enhance the Art in Public Places Program.

2. Economic Vitality

- Implement electronic plan review and permitting process.
- Increase accessibility to businesses and essential services through improvements to mobility and parking.
- Implement policies and programs to expand the City's affordable housing opportunities.
- Encourage redevelopment efforts in the transit corridor (i.e. University Village and mall site).

3. Historic Preservation and Small Town Feel

- Adopt Historic Design Guidelines to assist property owners with improvements to historic resources.
- Expand historic surveys to include areas that were not previously surveyed and properties with historically eligible buildings built in the 1950s and 1960s.
- Promote the City's historic preservation programs through new user-friendly educational materials.

4. Parks, Recreation and Open Space

- Develop an assessment and improvement plan for City parks and open spaces that includes adherence to industry standards.
- Promote awareness of recreational opportunities through a Citywide recreation newsletter.
- Enhance recreational program opportunities



Outcome Measure Examples

- Seek and support three new community events that reflect Redlands' diverse community.
- Adopt an Arts Master Plan.
- Redlands Bowl
 - Install new sound and lighting system.
 - Replace bench seating.
 - Aesthetically improve the Prosellis.
- Fund an art-on-loan program to complete the installation of art pieces at the designated locations within the City.
- Electronic Plan Review and Permitting processes implemented.
- Reduce time frames for plan review by 30%.
- Increased accessibility to businesses and essential services through improvements to mobility and parking.
- Implementation of a wayfinding sign program to direct the public to parking facilities to increase utilization of available parking lots and garages, with a goal of increasing occupancy of underused lots/garages by 50%.
- Adopt strategies to promote development of affordable housing units, which may include fee waivers, density bonuses, inclusionary housing requirements, and streamlining of Accessory Dwelling Unit (ADU) construction, with the goal of adopting three new strategies and/or programs.
- Work with developers to secure entitlements to redevelop the 12 acre Redlands Mall site and the 16 acre University Village site south of the University of Redlands campus, to provide new commercial and residential opportunities that support the community and local economy.
- Increased community satisfaction with the City's parks and open spaces, as measured periodically through a citizen survey.
- Recreational program offers expanded by 25%.



Current State

The City of Redlands is a full-service City that, in addition to providing police and fire services, operates its own water and wastewater utilities, cemetery, airport, landfill and solid waste services.

For more than 90 years, the City of Redlands has been in charge of providing high quality drinking water to more than 75,000 local residents. By supplying a blend of local groundwater, local surface water, and imported water from the State Water Project, Redlands Municipal Utilities & Engineering Department is able to meet the daily demands of these customers.

As Southern California often faces the challenges of prolonged droughts that strain water supplies, improving water conservation is becoming more important. The City of Redlands maintains a robust Water Conservation effort that includes non-potable water systems, commercial and residential watering restrictions, conservation programs, drought tolerant landscaping and education programs.

The City's Wastewater Treatment Plant, originally built in 1962, treats an average of six million gallons of wastewater daily. In the last 60 years, multiple upgrades to the existing infrastructure and new construction have taken place. In 2019 the City embarked on an assessment and developed a plan to implement immediate and long-term improvements to the plant. The current two-phase expansion project produces high-quality water at half the energy cost and will satisfy stringent air quality regulations and reduce the use of natural gas. The City is currently in a design phase for a project that will address additional required upgrades to all critical areas to keep up with regional growth. Over the next five years, the City of Redlands is slated to begin and complete upgrades to 12 treatment plant processes that will secure a sustainable and innovative approach to wastewater treatment.

The California Street Landfill is owned and operated by the City of Redlands. The County of San Bernardino began waste disposal operations at the site in 1963. In 1970, the City took possession of the site and continued waste disposal operation. In 2017, the City Council adopted a new solid waste rate structure, which included funding designated for capital improvement projects and the purchase of more efficient landfill equipment. Many routine alterations and additions to the landfill infrastructure and equipment have occurred throughout City ownership of the landfill; however, the recent rate adjustment provided the most significant positive impact on the landfill of the last 25 years. Landfill airspace, the amount of remaining space available for waste, is limited by the size of the site and its design. The more debris that is received, the faster that airspace is consumed.

Proactive measures by the City to improve the life expectancy of the landfill, including equipment upgrades and operational changes, have increased the usable capacity of the landfill by 42 percent, saved approximately \$8.5 million in avoided soil purchase import costs over the life of the landfill, and provided annual savings in equipment and operator costs of \$63,000 annually. In 2012, the City received a report indicating that the landfill would reach its capacity in the year 2042. With the recent improvements, the life of the landfill has been extended another 11 years to 2053. Improvements to the California Street Landfill ensure that this valuable asset will continue to serve Redlands residents for many more years.

The City has met and exceeded all required state mandates outlined in SB1383. The City of Redlands began offering food waste collection for commercial businesses in 2016 and a voluntary drop-off program for residential customers in September 2021.

Over the next few years significant improvements are planned to the landfill collection and control systems that will accommodate new and existing environmental regulations.

New residents to Redlands often cite safety as one of their primary reasons for moving to Redlands and longtime residents say it is one of the reasons they stay. The City's police and fire services are exemplary and enjoy tremendous support from the community. Under local control, the community is ensured that its public safety services focus on the priorities of the community and remain dedicated to local service. In recent years, the City dedicated funding to modernizing and upgrading both Police and Fire vehicles and equipment. The City has identified the need for new public safety facilities. Currently the Police Department operates out of multiple locations, each of them inadequate to the department's needs. The City is in the process of purchasing an existing commercial site that will be converted to a modern Police facility. The City is also exploring plans for new Fire stations, strategically located throughout the City to address the growth in population and both residential and commercial/retail buildings.



In 2021, the annual Point-In-Time-Count of unsheltered individuals identified Redlands as the City with the third highest population of individuals experiencing homelessness in San Bernardino County. The issue of homelessness is a multifaceted problem that affects the individuals involved as well as other residents, visitors and local businesses. For many years, the City has addressed the issue with limited resources including dedicated police teams and partnerships with social service agencies and non-profits to provide resources and services to the homeless while addressing the concerns of businesses and residents. A Homeless Emergency Aid Program (HEAP) grant provided for two Community Outreach Coordinators and additional resources until the grant ended in March 2021. Periodically the City partners with other agencies to perform cleanups of multiple encampments on state and county land. None of these efforts addressed the scale of the problem facing the City and those individuals affected. In November 2021 the City Council approved an MOU with two non-profits and a joint application to participate in the Homekey Grant Program. If successful, the City will convert an existing 99-unit hotel into permanent supportive housing for families and individuals experiencing homelessness that incorporates an all-inclusive model framework of wrap-around support provided by local partner agencies.

Future State

Redlands remains committed to providing safety, shelter and excellent core services to the residents and businesses in our community. Our city recognizes that in order to provide excellent core services, sustainability and water conservation must continue to be a priority. We have completed upgrades to 12 water treatment plant processes to secure sustainable and innovative ways to treat wastewater. Our City has also invested in more efficient landfill equipment that allows us to continue to increase capacity at the California Street Landfill. These efficiencies have enabled Redlands to continually extend the life expectancy of the site and increase landfill airspace. Significant improvements to the landfill's collection and control systems have also been completed. With these improvements, Redlands is proud to be able to meet all new and existing environmental regulations. We are also proud of our continued excellence in public safety services to our community. Our Police Department is now housed in a modern facility that allows our officers to better respond to and support the community. We have also focused on locating fire stations throughout our growing community. Our firefighters are now better equipped to more quickly respond to calls throughout the City. Our community is not only even safer, but more sheltered. The success of the Homekey Grant Program allows Redlands to provide shelter and wrap-around services to families and individuals experiencing homelessness.





Enhance services and programs so that all community members are safe, sheltered and have access to Redlands' core services.

Strategic Objectives

1. Water/Wastewater/Solid Waste

- Complete Wastewater Treatment Plant Phase 2 Project Construction.
- Reduce non-revenue water (water loss) by 25%.
- Complete California Landfill flair upgrade project to ensure facility compliance.

2. Police

- Complete steps to prepare for construction of a police station.
- Reduce public safety response times by 10%.
- Evaluate public safety workforce to determine if staffing levels are consistent with population growth. Develop a plan for workforce growth based upon results.

3. Fire

- Complete process for the construction of additional fire stations which will maintain critical response times based on the distribution and concentration of resources and ensure that service levels are being maintained based on call volume impacts, community growth and development
- Provide additional emergency response personnel to ensure an effective response force is maintained to meet City development and population growth.
- Determine current and projected administrative staffing needs. Develop and implement administrative growth based upon findings.

4. Homelessness

- Develop and implement a method by which to measure the success of the Homeless Housing Plan.

Outcome Measure Examples

- Wastewater Plant upgrades completed.
- Improved police response time to emergency calls for service.
- Police staffing plan developed.
- Steps for construction of new public safety facilities are identified
- Locations for additional fire stations identified and procured.
- Fire staffing plan developed.
- Steps for construction of additional fire stations identified.
- Method developed to measure success of the Homeless Housing Plan



Current State

The City of Redlands Communications and Community Relations Office provides outreach through various methods and platforms to provide information regarding City operations, programs and events to all segments of the community. Current communication methods include a variety of social media platforms and pages that combine to reach more than 27,000 followers; the City’s website, which saw more than 690,000 individual visits in 2021 alone; Redlands TV government access channel which, in addition to televising City Council and Planning Commission meetings, produces videos in house regarding a wide variety of City programs and functions as well as a community bulletin board; and a variety of periodic publications and outreach efforts to inform the public about individual department operations. The Communications and Community Relations Office also provides frequent information to a variety of local and regional media.

The City of Redlands Human Resources Division develops and administers programs designed to increase the effectiveness of staff and the organization. Human Resources staff facilitates the recruitment and selection, development and retention of individuals to promote a talented, diverse and inclusive workforce with the goal of representing the community we serve. Currently, the City recruits through various electronic means and websites that reach a large group of individuals. The City has implemented training on gender identity, inclusion and bias for all new employees and recognizes the need to increase the education of our workforce to ensure equity and inclusivity. Our current workforce demographics are 49.3% White, 32.1% Hispanic, 2.4% Black, and 2.18% Asian, with the remaining personnel listed as other or undisclosed. Additional efforts are needed to help bring the overall workforce in line with the demographics of our surrounding area. The City is implementing policies and practices that reflect a conscious effort to ensure equity of access and services and further ensure the equitable treatment of all people.





Future State

The City of Redlands recognizes the importance of community engagement with Redlands stakeholders to ensure the City's initiatives are properly communicated to them. Moreover, the City recognizes the importance stakeholders play in the development of these initiatives to ensure the City's vision aligns with the vision of the community. It is only through this collaboration that stakeholders can ensure the City is not only hearing the needs and wants of the community, but also that the City is implementing policies that promote the Redlands where they desire to live and work. In order to increase outreach to a greater segment of the community, the Communications and Community Relations Office has implemented a strategic communications and engagement plan that serves as a guide for the City in its pursuit of forward thinking initiatives and explains what Redlands stakeholders can expect from the City. It establishes the structure for communication and engagement of stakeholders in the development of initiatives and identifies strategies for seeking out involvement and establishing measureable goals to determine the success of the City's collaborative efforts with stakeholders. Finally, it serves as a living tool for community engagement that may be followed in the development of any City goal, objective or initiative.

The City of Redlands understands the importance of providing an environment where diversity, equity and inclusion are key considerations in the recruitment and retention of a talented workforce that reflects the community it serves and brings a variety of perspectives to citywide decision making. Continually implementing policies and procedures that provide access and equity for applicants, residents and staff is imperative in maintaining the representation of the workforce. Job descriptions, personnel rules and regulations, and recruitment strategies are reviewed regularly and evaluated to determine bias or adverse impact. The City engages in targeted recruitments to increase the diversity of our applicant pools and ensure that the workforce reflects the demographics of the City's population. The City's workforce is trained regularly on topics specific to equality, bias, gender identity, harassment and inclusion. This training provides a culture that is focused on valuing employees and providing an environment where different perspectives can be shared openly. The City engages in workforce strategies that include initiatives to create a diverse and inclusive workplace in a sustainable way.





Cultivate wide-ranging community engagement and a work force that strives to ensure everyone in the community has access to city services and facilities.

Strategic Objectives

1. Communication and Engagement

- Evaluate alternative and/or additional means of communication to help ensure all parts of the community have the opportunity to receive, understand and participate in City life.
- Develop centralized messaging, outreach and awareness campaigns that focus on identifying and reaching all residents within the community.

2. Workforce

- Provide diversity, equity and inclusion (DEI) training for all City staff.
- Recruit, hire and train a diverse and inclusive workforce that represents the community.

Outcome Measure Examples

- Develop and implement a Communications Plan by December 31, 2022.
- Method established to measure effectiveness of City's communication methodology to provide baseline for improvement in future years.
- 100% of City staff receive initial DEI training by December 31, 2023.
- Comprehensive employee training plan developed.
- Establish baseline metrics for current staffing demographics in comparison to community.
- Identify gaps or areas of focus for future recruiting, hiring and training.
 - Develop plan to address the identified gaps.
- Increased diversity of City workforce.



Current State

A sustainable city is one that ensures a livable environment for its residents over the long term through thoughtful stewardship of its resources, including financial resources.

For more than a decade following the Great Recession of 2008 the City of Redlands worked diligently to implement sustainable fiscal and financial policies, including consistently balanced budgets, based on recurring revenue sources and sound management, focusing on core services and capital needs, building healthy reserves and reducing debt.

In the spring of 2020, the COVID-19 pandemic created not only a public health crisis but a financial crisis for local governments. Working essentially in emergency-response mode to prevent the spread of COVID-19 while also providing municipal services in pandemic conditions, the City of Redlands drastically reduced its budget and staffing levels in response to the impact COVID had on its revenue streams and the impact it had on taxpayers. By June of 2021 when the City Council approved the Fiscal Year 2021-2022 budget, however, the City's fiscal picture was quite different. Revenues began approaching pre-pandemic levels and Redlands voters approved a one-cent sales tax. The City began restoring staffing levels and resources in areas such as Police, Fire, Library and Facilities.

Additionally, the City not only restored previous cuts, it also enhanced services in the areas of public safety and general infrastructure needs.





Future State

The budgeting process is one of the most important activities a City undertakes. In order to align the City's resources with the future vision for the community, the City developed a Biennial Budgeting process that links objectives to the resources necessary to accomplish them, sets meaningful objectives with realistic timelines for completion and incorporates a multifaceted approach toward developing the strategic vision for Redlands, including this Six-Year Strategic Plan and regular Citizen Satisfaction Surveys. The City continues to consider the long-term extent of the economic impact resulting from the COVID-19 pandemic and the effects of CalPERS investment earnings/losses and potential policy changes they would have on future pension costs. The revenues from Measure T, post-pandemic economic gains and the strategic planning process have positioned the City to provide the services and programs valued by the community.

The City understands the need to be a competitive employer and maintain a sustainable workforce to ensure its future success. The City provides an environment where employees feel engaged and encouraged and have opportunities for growth. The City's onboarding program for new employees begins that engagement from day one. The year-long onboarding program is centered on acclimating new employees to their roles and the City's culture, giving employees a sense of belonging and commitment to the City and increasing retention. As part of the City's efforts to maintain its workforce and develop a succession plan, the City has created a focus on training and professional development for staff that increases engagement of employees at all levels, improves employee skill levels, enables career progression and results in employees who stay longer with the City and minimizes the institutional knowledge loss when long-term employees transition out of the organization.





Preserve and protect what makes Redlands special by maintaining core services, infrastructure and community values.

Strategic Objectives

1. Fiscal

- Develop a Long-Term Financial Plan that sustains core services and programs and helps prioritize funding for new initiatives.

2. Environmental

- Expand the non-potable water system
- Develop a landscape ordinance to provide guidelines for commercial and residential properties to include drought tolerant or water conservation landscaping measures.

3. Infrastructure

- Develop and implement Water and Wastewater Utility Master Plans to ensure facilities are improved and maintained to meet the needs of our expanding community
- Engineer and construct transportation facilities to accommodate all potential users – motorists, cyclists and pedestrians
- Develop a facilities capital improvement program to ensure that adequate funding is planned for industry standard maintenance.

4. Workforce

- Create an onboarding plan for new employees.
- Create an employee retention plan that addresses career development and mid-career development.
- Create a succession plan that addresses knowledge transfer.

5. Climate Change

- Explore City initiatives to address the effect of climate change.

Outcome Measure Examples

- Long-Term Finance Plan developed.
- Four additional miles of nonpotable water system constructed by December 31, 2024.
- Water and Wastewater Utility Master Plans developed and implemented
- Landscape Ordinance adopted by December 31, 2023.
- Facilities capital improvement program developed.
- Onboarding program developed and implemented for new employees by January 2023.
- Employee Retention and Succession Plan Developed and Implemented by December 31, 2024.
- Comprehensive climate change briefing delivered to the City Council by December 2023.

Redlands City Values

We strive for excellence
and are innovative

We are fiscally responsible

We seek sustainability

We are responsive

We are fair, honest, and
act with integrity

We are accountable and
make sound decisions
based on clear rationale

We treat everyone with respect

We embrace diversity
and inclusiveness

We communicate openly,
clearly and frequently

We take pleasure
in the work we do





Cooper City

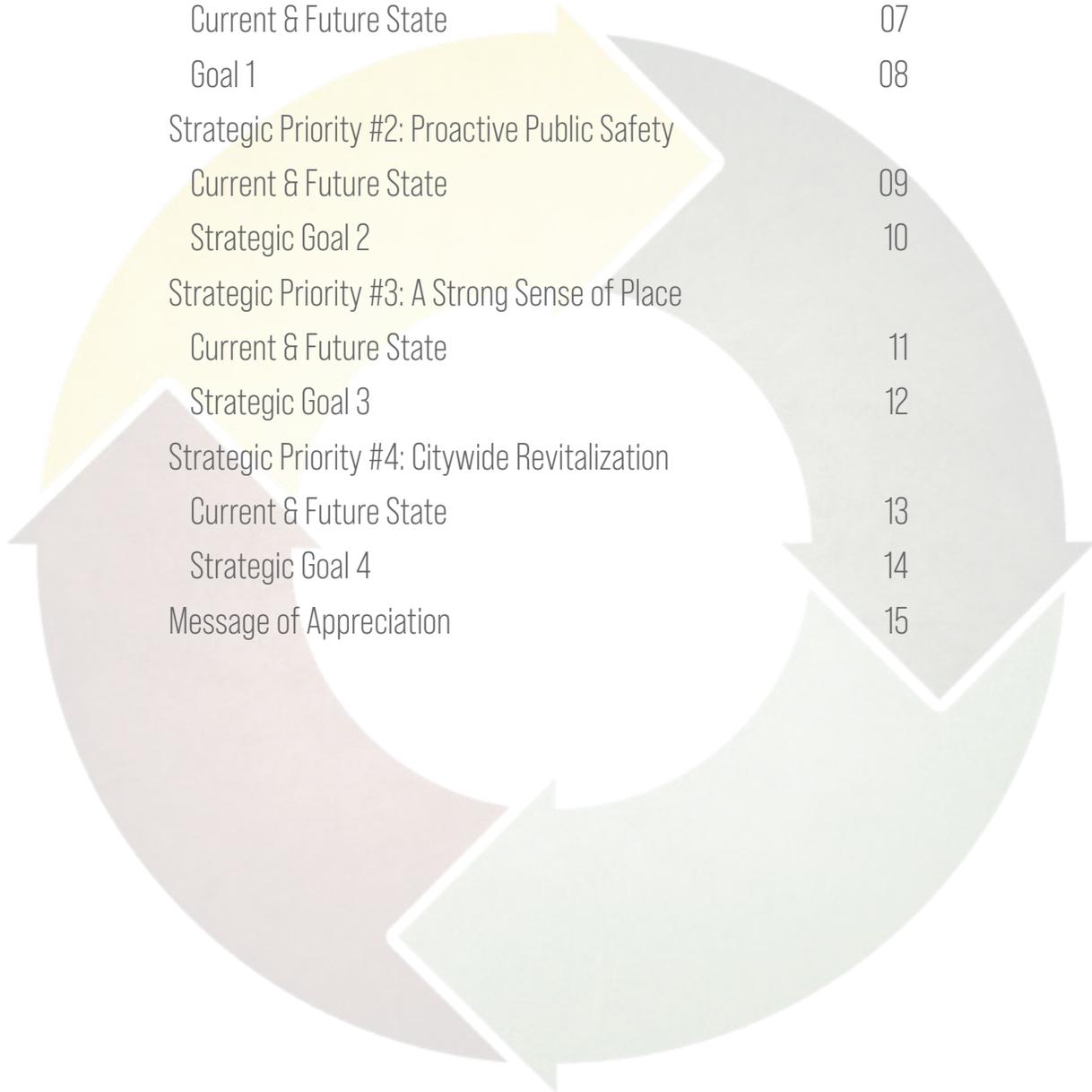
Someplace Special

Strategic Plan 2022-2027

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Mayor's Message



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

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

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

Sincerely,
Mayor Greg Ross



Mayor
Greg Ross



Commissioner
Jeff Green
District 3



Commissioner
Massimo “Max” Pulcini
District 1



Commissioner
Howard Meltzer
District 2



Commissioner
Ryan C. Shrouder
District 4

Letter from the City Manager



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

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



City Manager
Joseph Napoli

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

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

With Appreciation,
Joseph Napoli



Mission Statement

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

Core Values

Professionalism

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

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

Customer Service

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

Innovation

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

Respect

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

Teamwork

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

Vision Statement

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





Current State

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

Future State

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





Strategic Goal 1

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

Objectives

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

Performance Measures

Increase revenue stream

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

Expand tax base

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

Increase fiscal transparency

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

Increase fund balance

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

Explore new efficiencies through technological improvements

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



Current State

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

Future State

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





Strategic Goal 2

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

Objectives

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

Performance Measures

Improved traffic management and safety

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

Improve response times

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

Invest in technological capabilities that enhance public safety

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

Maintain a low-level crime rate

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

Develop an interactive relationship with the community and enhance involvement

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



Current State

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

Future State

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





Strategic Goal 3

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

Objectives

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

Performance Measures

Resident satisfaction with Cooper City as place to live

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

Businesses blending with the charm of Cooper City

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

Connectivity across the city

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



Current State

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

Future State

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





Strategic Goal 4

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

Objectives

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

Performance Measures

Commercial Centers

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

Residential Areas

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

City-wide Plans and Improvements

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



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

- Joseph Napoli, City Manager
- Mike Bailey
- Chief James Bishop
- Jason Chockley
- Michael Cobelo
- Captain Christopher De Giovanni
- Tim Fleming
- Brandon Johnson
- Darryl McFarlane
- Nannette Rodriguez
- Kathryn Sims
- Carlos Vega
- Stacie Weiss



CITY OF
Cooper City
Someplace Special



WESTMINSTER
COLORADO

2021-2022 Strategic Plan

Environmental Scan



What is an Environmental Scan?

A best practice in strategic planning is to begin with a scan of the current environment using a broad spectrum of qualitative and quantitative data. The purpose of the scan is to:

- Identify potential opportunities, challenges, and trends that can impact the City's strategic direction and priorities.
- Better understand the needs and desires of the City's stakeholders and residents.
- Build a shared understanding of the current state.
- Understand the forces and obstacles that can hinder the achievement of goals and objectives.



The intent of the environmental scan is to identify key themes and strategic data points that will focus the Council's discussion and guide the planning process.

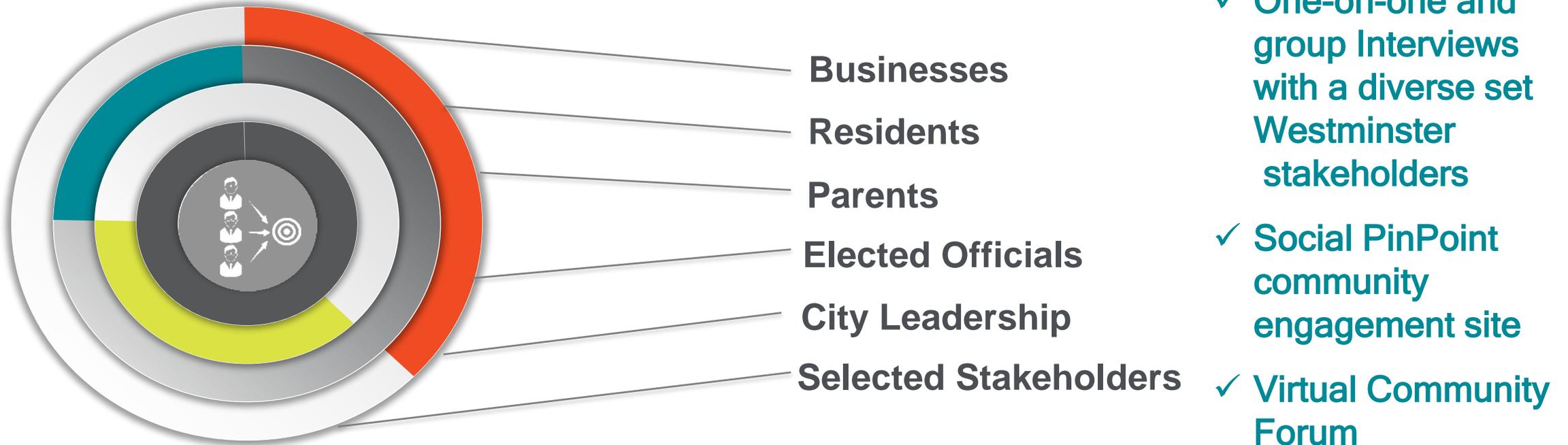
Environmental Scan Approach: Data and Document Review

The consulting team reviewed and analyzed a broad array of data, documents and plans provided by the City, including:

- Adopted FY 2021 Budget
- Affordable and Workforce Housing Strategic Plan, 2017
- Arts and Culture Master Plan
- Business Survey, 2020
- CDBG Consolidated Plan, 2015 - 2019
- City Economic Profile, 2020
- Complete Comprehensive Plan, 2015 Update
- Comprehensive Annual Financial Report, December 2019
- Demographic Overview, 2019/2020
- Economic Base & Industry Opportunities in Westminster, 2017
- Economic Development Department Overview, 2019
- Fire Department Strategic Plan, 2019 - 2023
- Housing Needs Assessment, January 2017
- IACP Operations and Management Study, 2019
- IT Strategic Plan, 2019
- Popular Annual Financial Report, 2019
- Water and Wastewater Infrastructure Planning
- Westminster Community Survey, 2020
- Westminster Forward community engagement notes
- Westminster Forward website
- Westminster placemaking plans
- Westminster Strategic Plan, 2020
- Westminster Strategic Plan Update, Fall 2020
- WestyRISE Recovery/Resiliency Report

Environmental Scan Approach: Stakeholders

We engaged a broad range of residents, stakeholders, advocates, and interests.



Environmental Scan

Westminster Community Profile

Quality of Life in Westminster

82%

Overall quality of life in Westminster

80%

Overall quality of neighborhood

Percent very good/good or strongly agree/somewhat agree



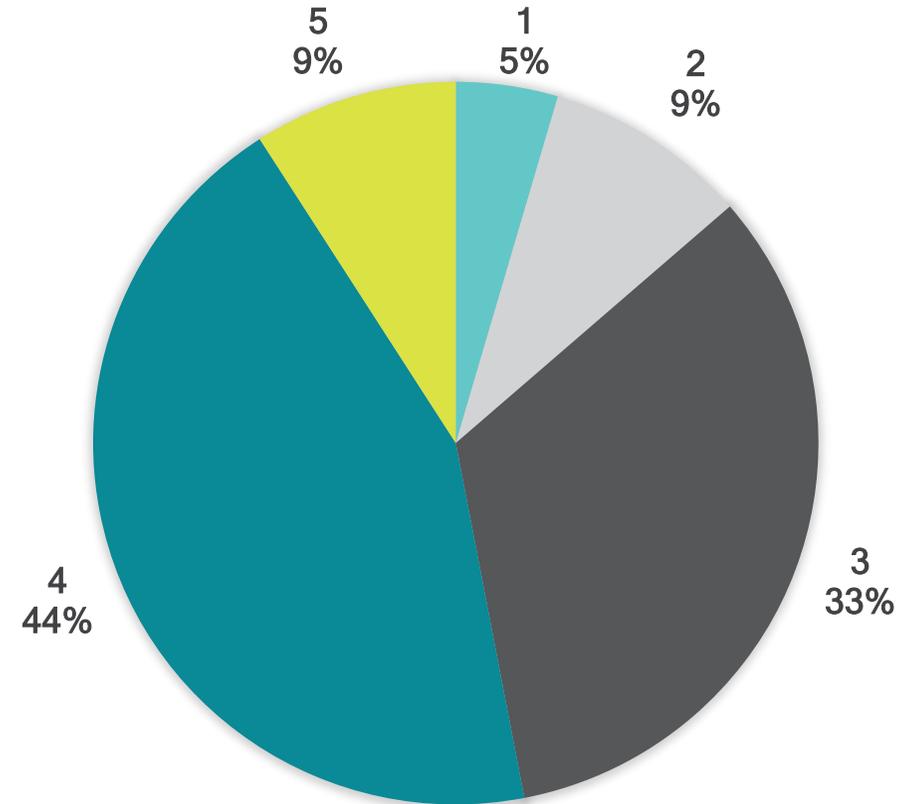
Westminster residents generally give positive marks to the overall quality of life in the City.

2020 Community Survey, National Research Center, Inc.

Quality of Life in Westminster

The input on the Social PinPoint engagement platform input was similar to the results of the 2020 Community Survey. In this survey more than half of respondents ranked the quality of life as a 4 or 5 and a third ranked it 3 (average).

On a scale of 1 to 5, with 5 being the highest, how would you rate the quality of life currently in Westminster?



Source: 2021 Social PinPoint Community Survey

Quality of Life in Westminster

Westminster has achieved several awards that point to the quality of life in the City.



2019 Large City of the Year, Economic Development Council of Colorado



2019 American Council of Engineering Companies National Honor Award Winner - Westminster Station Park and Transit Oriented Development



2019 Partner for Safe Water - Directors Award for Distribution System Operations



2018 Colorado Parks and Recreation Association Marianne Logan Award



2018 Government Finance Officers Association - Excellence in Financial Reporting for 2017 Comprehensive Annual Financial Report



Community Characteristics



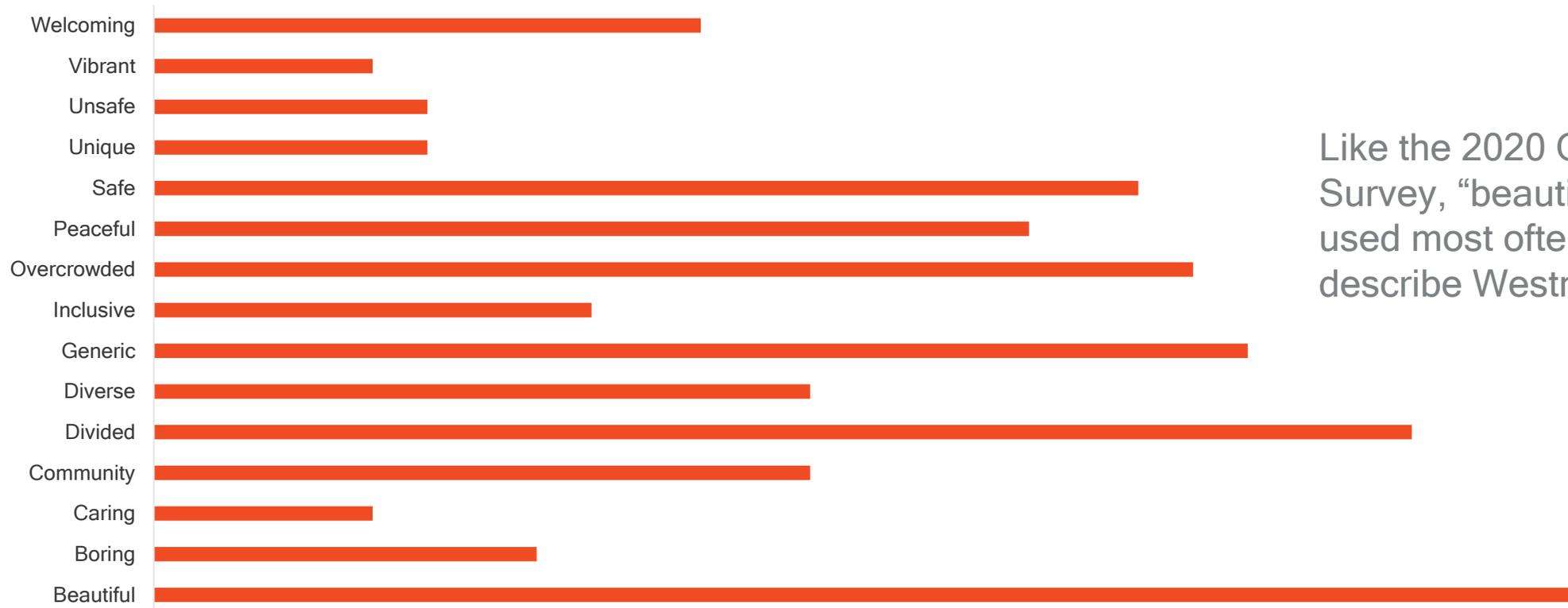
76% agree that “Safe and secure” describes Westminster

93% agree that “Beautiful parks and open space” describes Westminster

Source: 2020 Community Survey, National Research Center, Inc.

Community Characteristics

Which of the following words best describes Westminster in your eyes?



Like the 2020 Community Survey, “beautiful” was used most often to describe Westminster.

Source: 2021 Social Pinpoint Community Survey

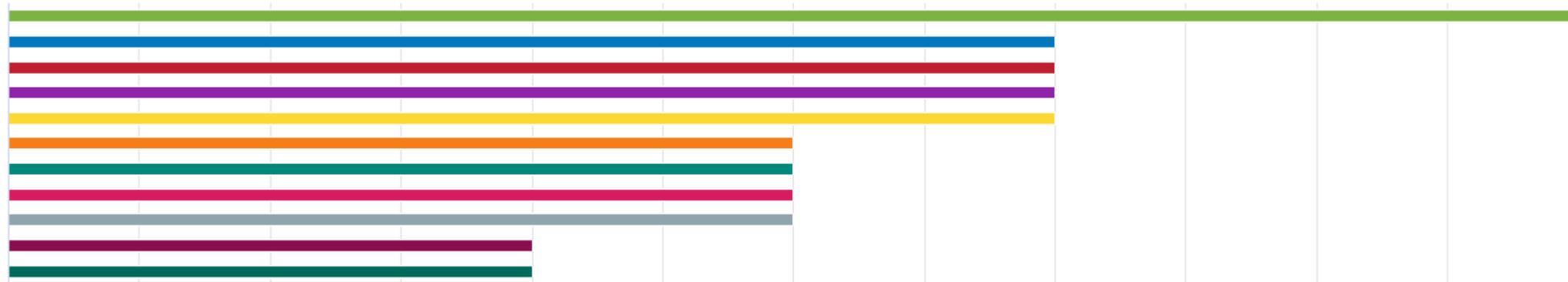
Community Characteristics



Source: 2020 Community Survey, National Research Center, Inc.

Community Characteristics

Strategic planning survey respondents ranked their favorite aspects of Westminster as follows:



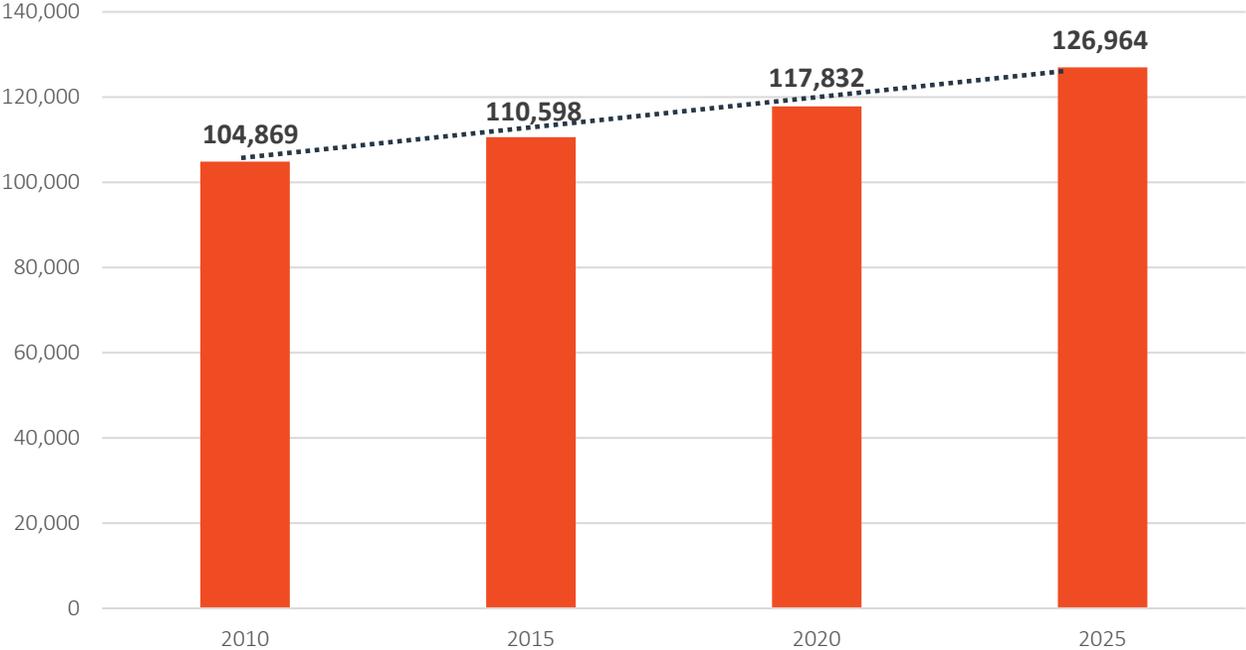
- Parks, Trails and Open Space
- Ease/quality of mobility (streets, bike lanes, bus, etc.)
- Restaurants and entertainment
- Recreation facilities and programming
- Crime, safety, and security
- Commercial and shopping

- Schools and educational opportunities
- Availability of good job opportunities
- Sense of community/belonging
- Cultural opportunities and events
- Variety of housing types of residential neighborhoods

Source: 2021 Social Pinpoint Community Survey

About Westminster

Westminster Population



Source: 2019 American Community Survey, U.S. Census Bureau



\$76,142

Median Household Income



\$340,900

Median Home Value

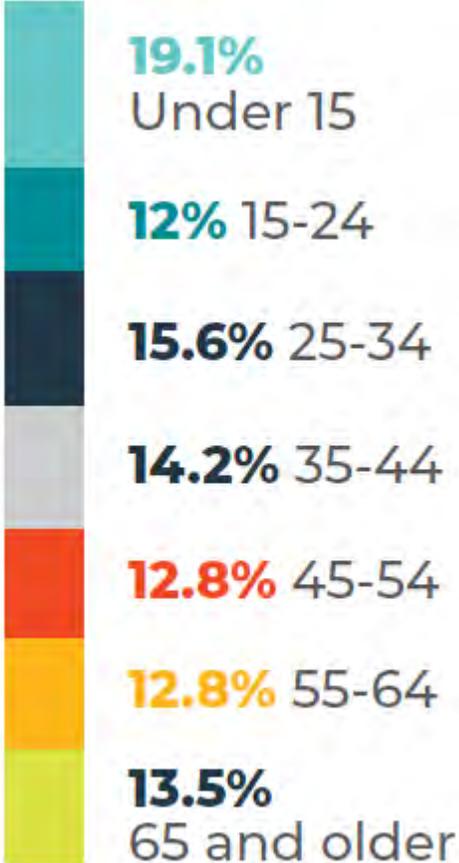
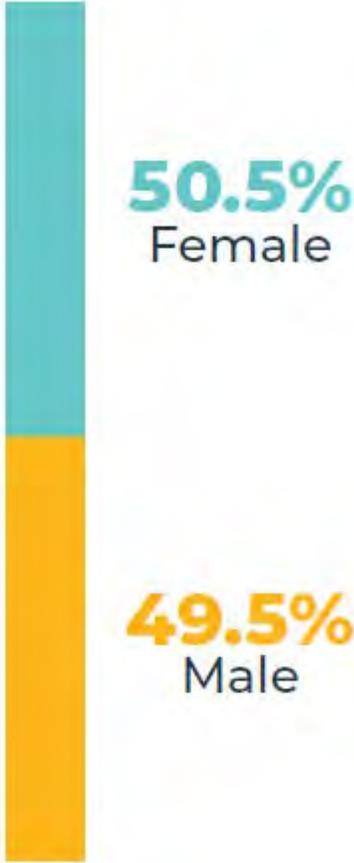
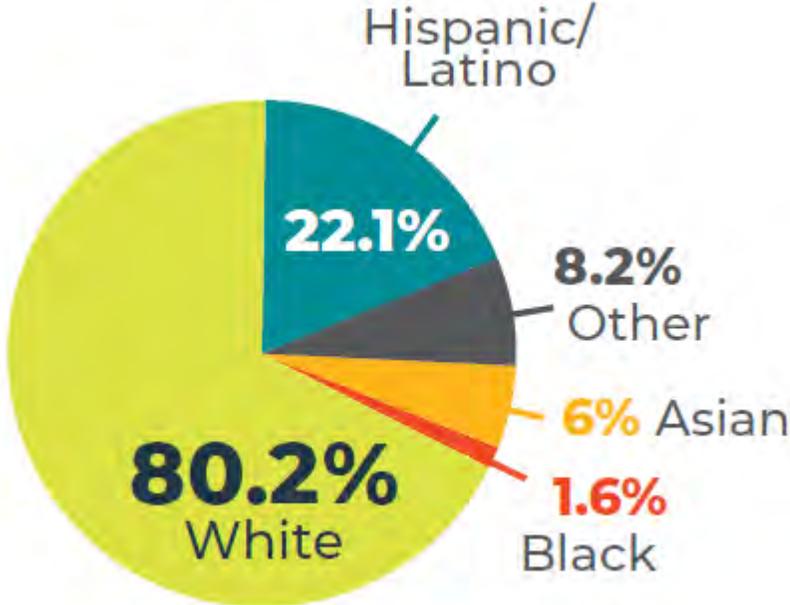


92%

High School Graduate or Higher



Westminster Population



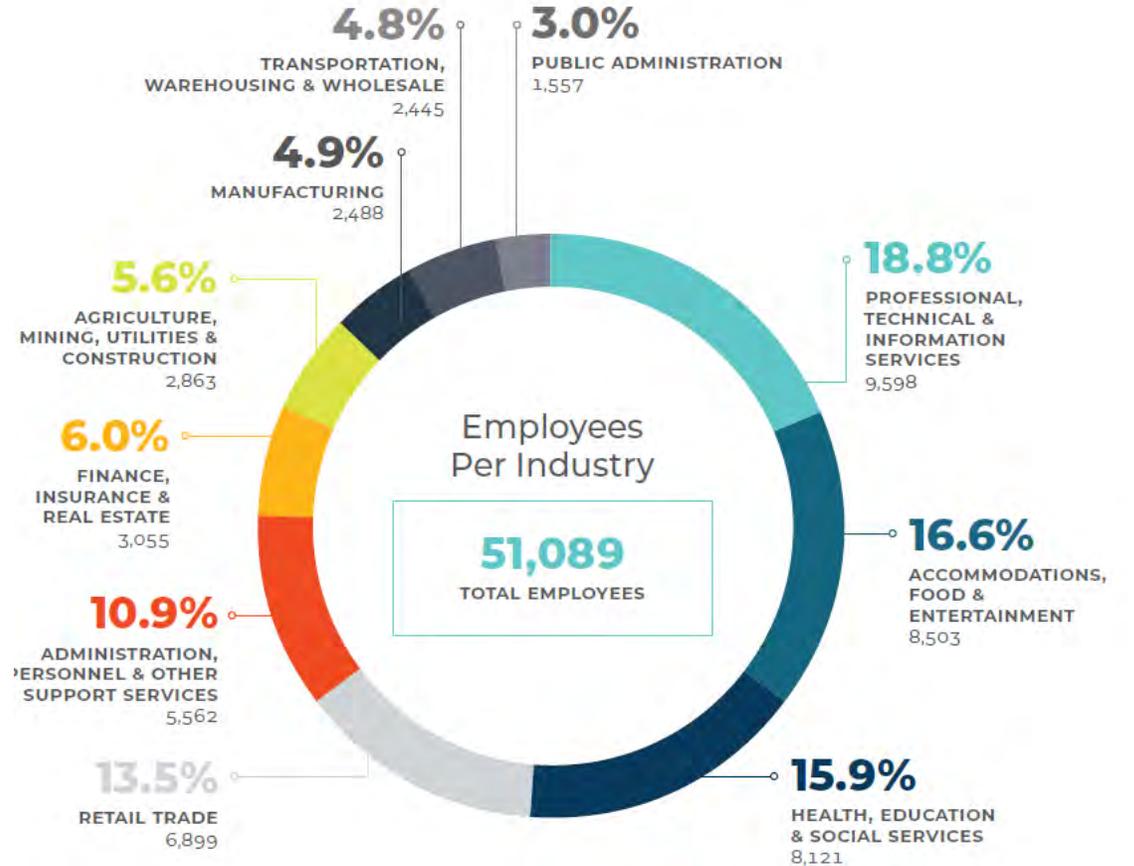
Source: 2019 American Community Survey, U.S. Census Bureau

Employment and the Economy

EMPLOYED RESIDENT POPULATION BY OCCUPATION



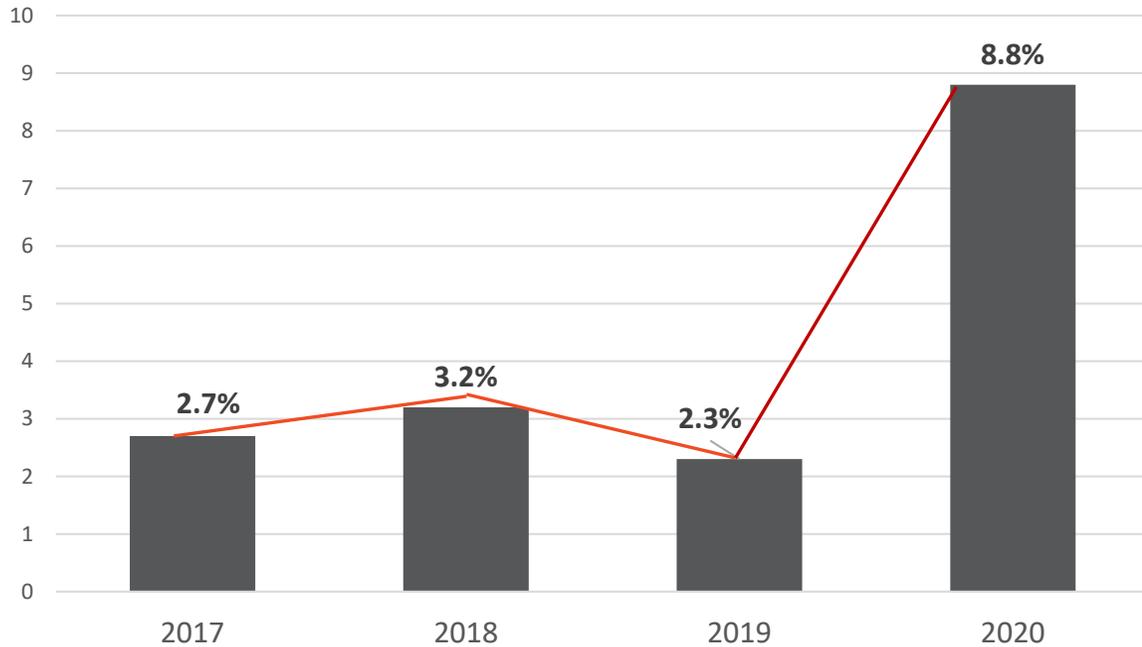
Source: U.S. Census Bureau, Community Analysis, December 2019



Source: U.S. Quarterly Census of Employment and Wages, Q1 2019

Employment and Economy

Unemployment Rate



Like many communities, Westminster experienced significant job losses in 2020 and high unemployment.

Source: U.S. Bureau of Labor Statistics

Top Primary Employers

2020 RANK	EMPLOYER	2019 EMPLOYMENT
1	Ball Corporation* Aerospace and Packaging	1,252
2	Maxar* Geospatial Technologies	1,071
3	St. Anthony's North Hospital Healthcare Provider	1,015
4	Trimble Geopositioning Technologies	733
5	Alliance Data Systems Network Credit Authorization	677
6	Tri-State Generation* Electric Energy Wholesaler	541
7	MTech Mechanical Technologies Group HVAC Systems	535
8	ReedGroup Human Resources Management	496
9	Epsilon Marketing Agency	454
10	CACI International Research & Technology	407

*Corporate headquarters

Source: City of Westminster Economic Development Department, 2019

Westminster Government

Westminster's property tax rates are significantly lower than its neighboring cities.

The City's sales tax rate is the fourth highest among its 11 neighboring communities.

2020 Residential Property Tax Rate Comparisons

City	City Levy	Fire Protection District Levy	City and Fire Levy
Northglenn	11.597	14.674	26.271
Broomfield (City)	11.457	14.674	26.131
Fort Collins	9.797	10.665	20.462
Arvada	4.310	14.821	19.131
Loveland	9.564	8.810	18.374
Lakewood	4.711	13.732	18.443
Littleton	6.662	9.250	15.912
Longmont	13.420	-	13.420
Boulder	11.981	-	11.981
Thornton	10.210	-	10.210
Aurora	8.605	-	8.605
Westminster	3.650	-	3.650

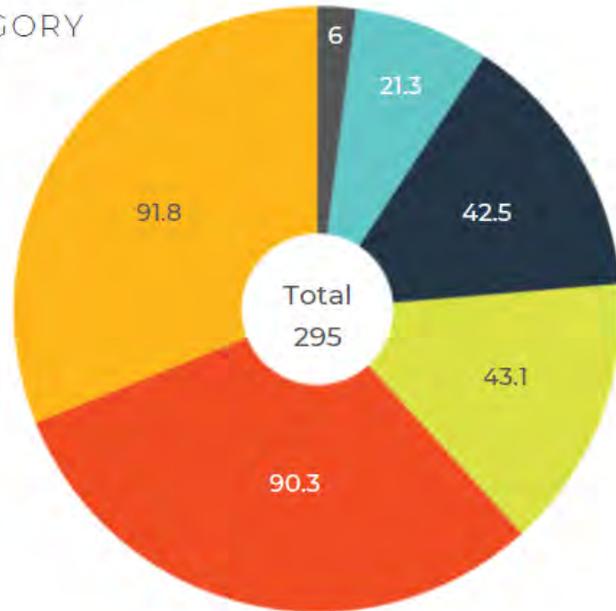
2020 Sales Tax Rate Comparisons

City	Municipal Sales Tax Rate
Broomfield (City)	4.15%
Northglenn	4.00%
Boulder	3.86%
Fort Collins	3.85%
Westminster	3.85%
Aurora	3.75%
Thornton	3.75%
Longmont	3.53%
Arvada	3.46%
Loveland	3.00%
Littleton	3.00%
Lakewood	3.00%

City Revenues and Expenses

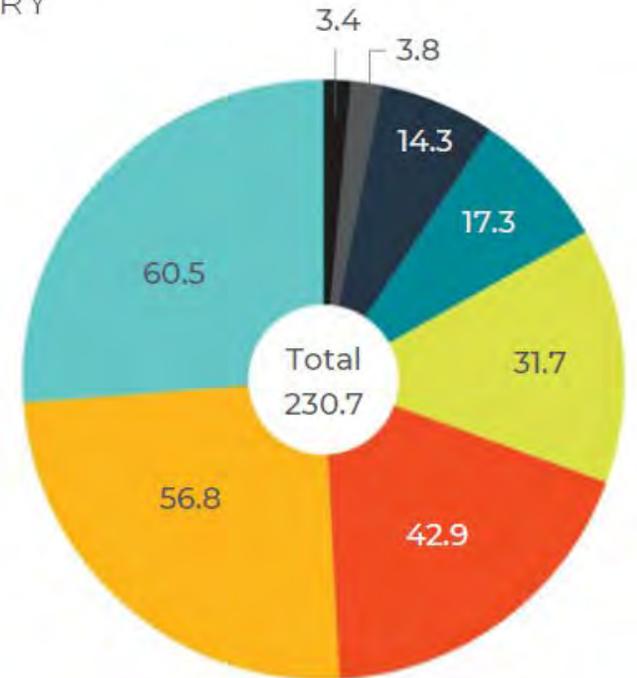
2019 REVENUES BY CATEGORY
\$(MILLIONS)

- Property Taxes
- Use Taxes
- Grants
- Other
- Sales Taxes
- Charges for Services



2019 EXPENSES BY CATEGORY
\$(MILLIONS)

- Other
- Economic Development
- Community Development
- Public Works
- Culture & Recreation
- Public Safety
- Utility
- General Government



Source: Westminster Popular Annual Financial Report, December 31, 2019

Quality of Services



Percent very good/good. Downward arrows indicate a decline in quality from the 2018 survey results.



Source: 2020 Community Survey, National Research Center, Inc.

Quality of Services

Percent very good/good. Stars indicated the services that rate above the national benchmark.



85%

Recreation Programs



85%

Recreation Facilities



85%

Trails

81%

Parks Maintenance

76%

Preservation of Natural Areas

Source: 2020 Community Survey, National Research Center, Inc.

Quality of Services

Name the things Westminster's City government does well:



Like the 2020 Community Survey, respondents to the Social PinPoint survey identified parks and open space, recreation programs and facilities, public safety, and safe drinking water as the things the City does best.

Source: 2021 Social Pinpoint Community Survey

Environmental Scan

Stakeholder Views and Perspectives

Analysis of Stakeholder Input

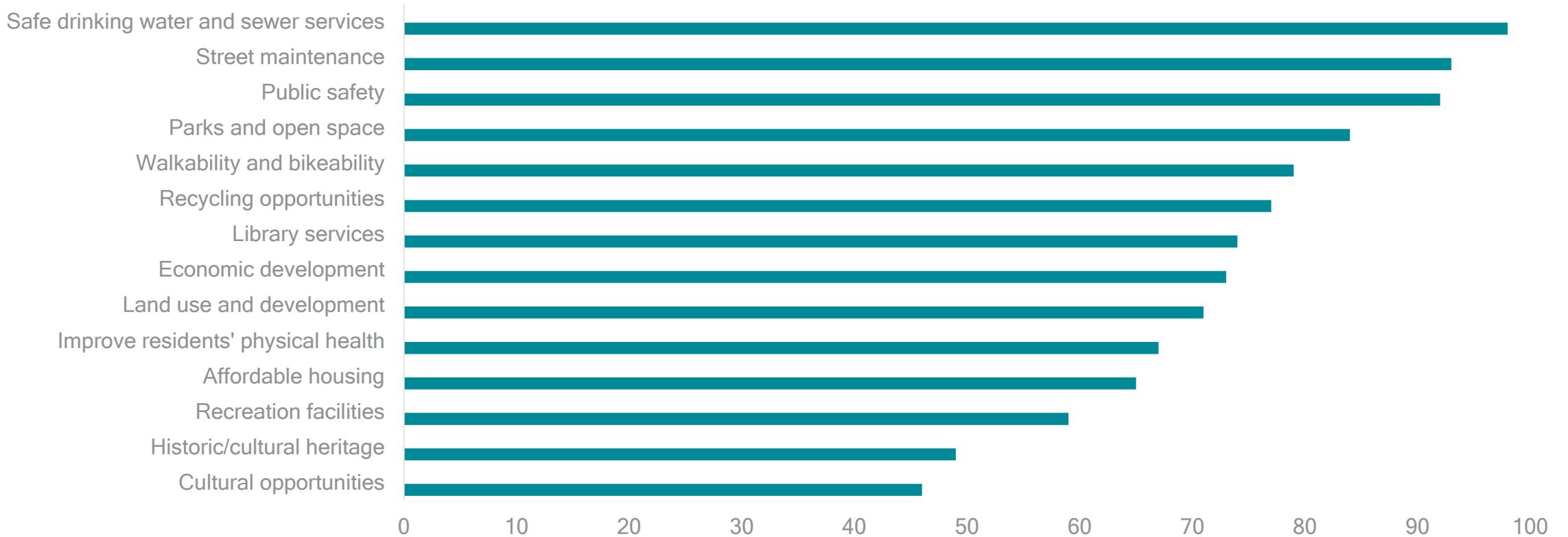
All individual stakeholder input and survey responses were compiled, analyzed, and coded by theme.

- ▶ A response, idea, or comment had to be mentioned several times - not just once or twice - in order to be listed as a theme.
- ▶ Themes are identified as possible goals, strategies or objectives for Council consideration.



Most Important Issues

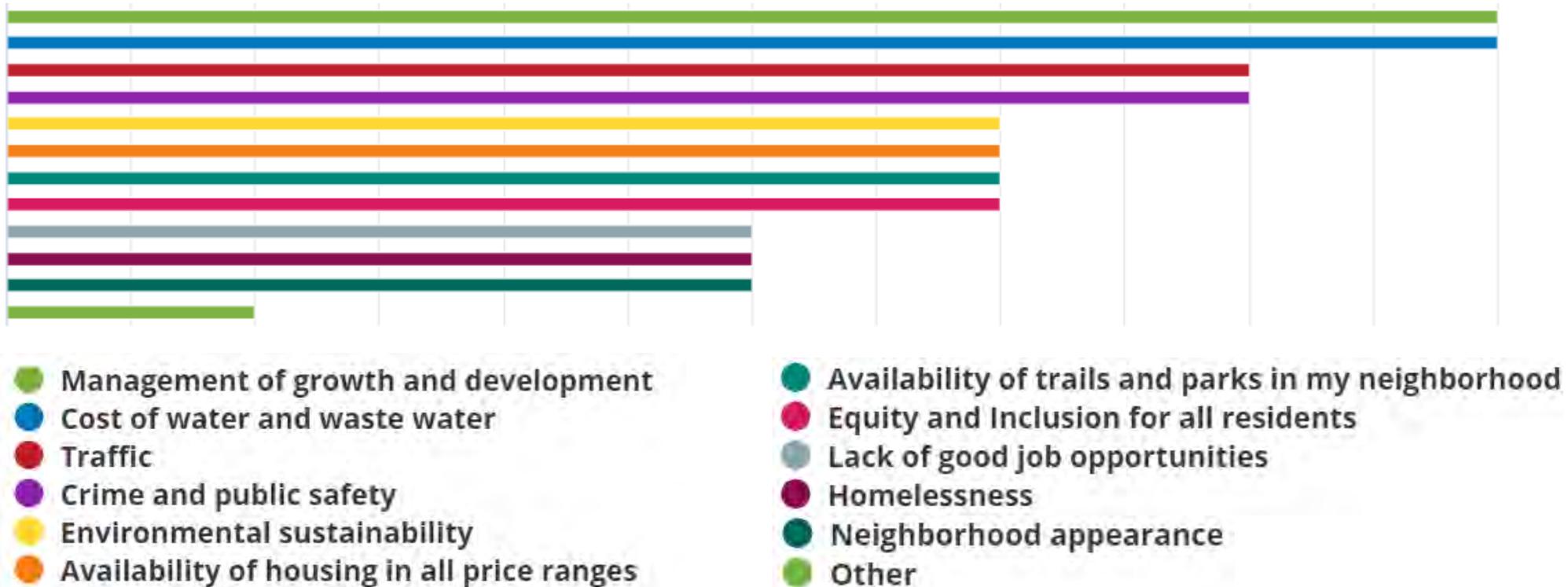
Percent identified as “essential” or “very important”



Source: 2020 Community Survey, National Research Center, Inc.

Biggest Concerns

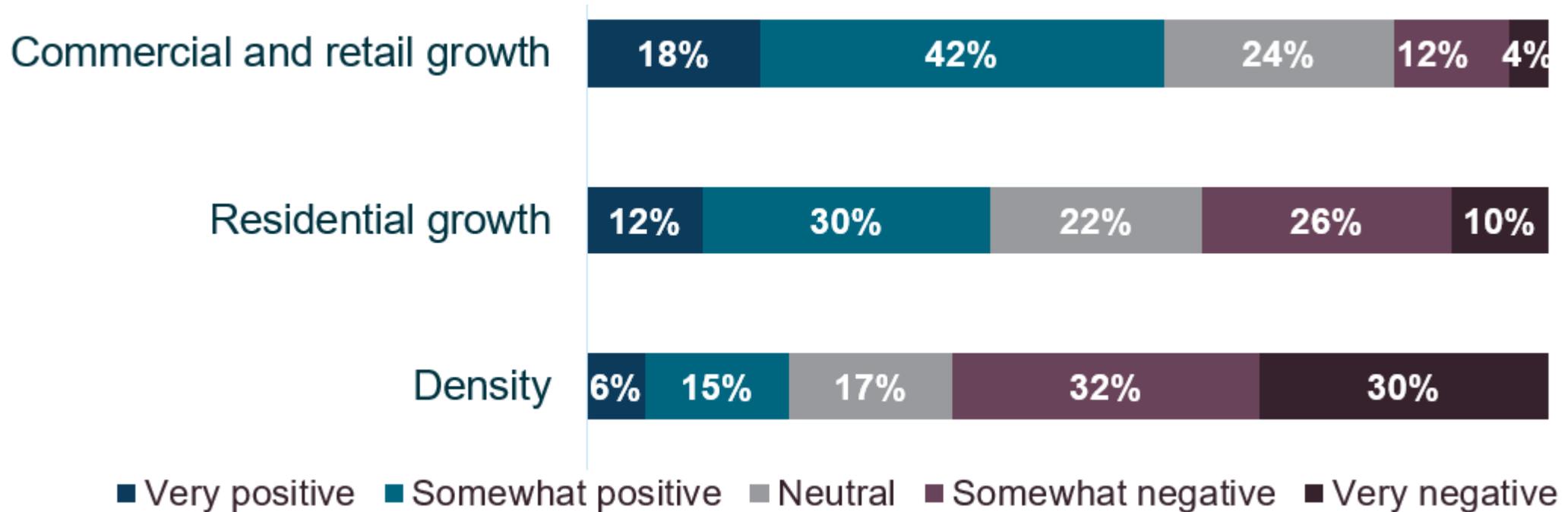
Rank your biggest concerns with Westminster:



Source: 2021 Social PinPoint Community Survey

Biggest Concerns

Residents and stakeholders voiced significant concerns regarding growth and density and balancing these competing forces.



Source: 2020 Community Survey, National Research Center, Inc.

Biggest Concerns

Open ended question:
Affordable housing
was the #1 way the City
could improve community
quality of life
(1 in 5 residents)

However, survey respondents ranked affordable housing 12th out of the 15 most important or essential things the City does.



Ensure the City
provides ample
affordable/
workforce housing

“The Front Range Dilemma”



Source: 2020 Community Survey, National Research Center, Inc.

Concerns of Businesses

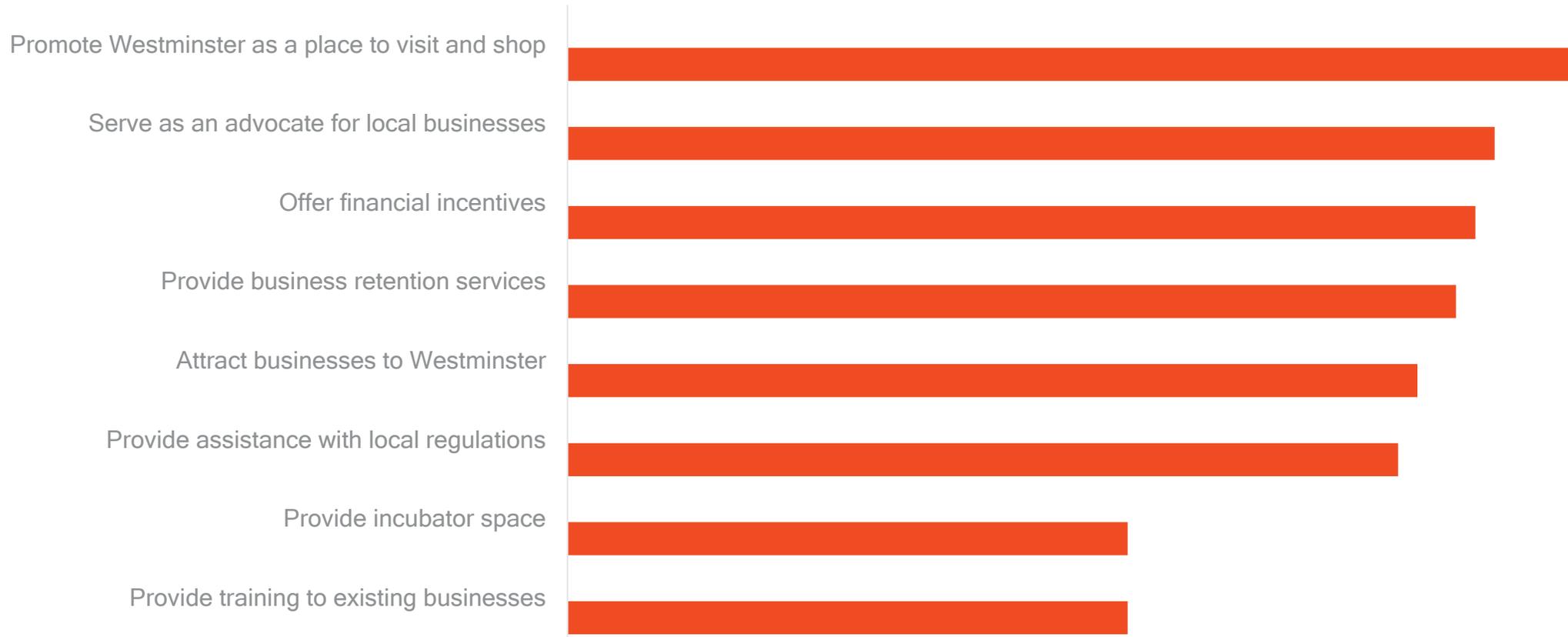
- Lack of downtown “epicenter” with amenities that compete with neighboring cities
- Lack of diversity in Westminster’s economic base
- Competitive disadvantages
 - Sales and use taxes
 - Inadequate affordable labor force
 - Building requirements and ordinances not always friendly to business
- Traffic congestion
- Cost of living



Source: 2021 Stakeholder Interviews

Concerns of Businesses

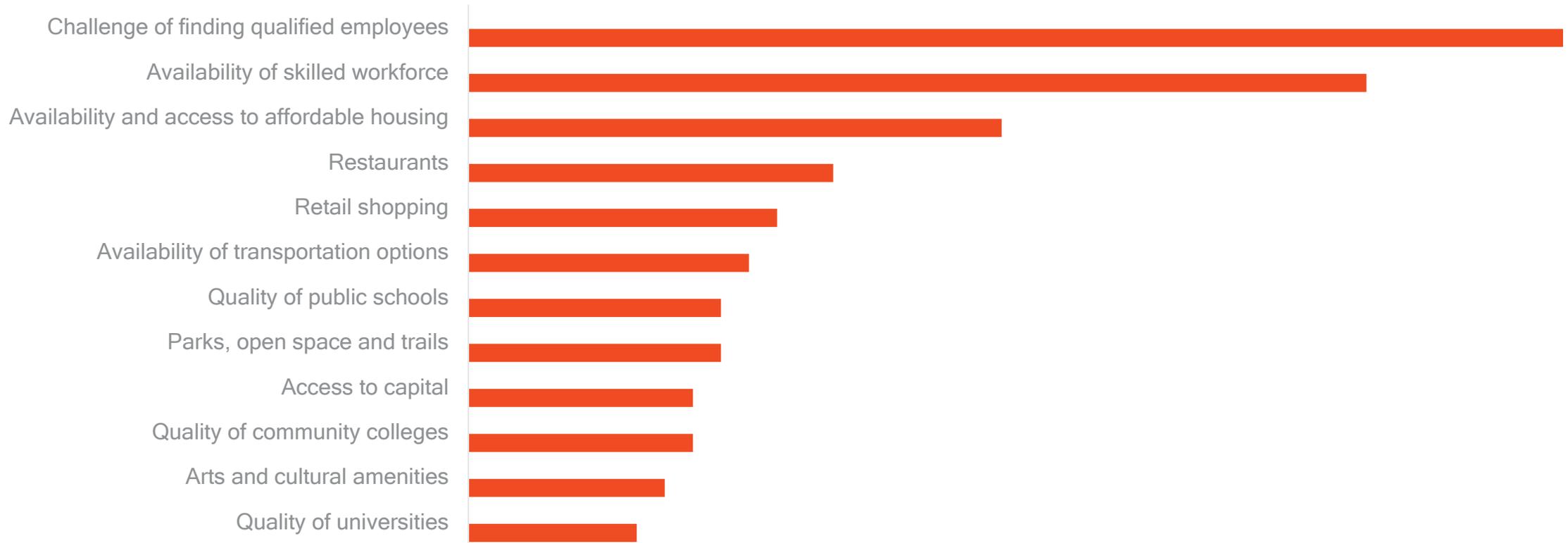
Prioritize services the City is providing or could provide to foster growth in the business community:



2020 Business Survey, Left Brain Concepts, Inc.

Concerns of Businesses

Issues that Impact Company Operations



2020 Business Survey, Left Brain Concepts, Inc.

Concerns of Parents

- Good schools that value diversity and inclusion
 - Increased bilingual personnel
 - Increased cultural sensitivity
- Quality, affordable housing
- More culture, art, and music
- Clean streets and parks
- More recreational spaces through the winter
- More equitable and inclusive practices in City service delivery
- More mental health services, particularly for young people
- Low cost/free after school and summer programs for children
- Greater ability to thrive - access to quality food, good jobs and healthcare



Source: 2021 Stakeholder Interviews

Concerns of Residents

- Range of housing types and pricing
- Environmental sustainability and conservation (water, energy, recycling, land)
- Strategic plan for growth that includes affordable housing and multi-modal transportation and prevents housing displacement
- Distribution of restaurants, entertainment, and recreational amenities and events throughout the City
- Completing the City's current development projects
- Making the City more welcoming and inclusive
- Access to resources for those experiencing homelessness or food insecurity
- Greater walkability and bikeability
- Achieving more clarity and agreement on the City's priorities
- More equitable distribution of the cost of government
 - Less reliance on sales tax
 - Income-sensitive water rates

Source: March 2021 Community Forum



Concerns of Residents

Source: 2021 Social PinPoint Ideas Wall

Balancing water supply with affordable water rates should be a concern. Don't just Jack up the rates so high in support and anticipation of a high density development that doesn't take into consideration the stress it's putting on current residents.

4 hours ago

Like +1 Dislike

Love seeing all the community support for natural parks and open space! New development is the key to funding those public amenities, and it seems like Westminster has struck a great balance so far. I'm excited to see the city continue to evolve and become a vibrant mix of parks, suburbia, and accessible commercial centers.

6 hours ago

Like +1 Dislike -1

The housing inventory in Westminster is really low right now, driving the prices of homes way up. But we need to maintain the character of the neighborhoods with similar types of housing. No high density living at the farm. Maintain the open space and parks that the current plans promise. Don't sell out to money hungry developers just looking to make a buck at the expense of the Westminster community.

4 hours ago

Like +1 Dislike

South Westminster is dying and needs to be redeveloped. There is no reason why the old town part of Westminster can't be developed in the same fashion as the old town part of Arvada has, We have all the same components as old town Arvada including the lite rail station. It would be an economic generator for our city, increase property values, wipe out blight, and will help with our homeless problems in the area.

7 days ago

Like Dislike

Inclusivity means equal access to all city resources. Coming out of the year of Covid, data shows the increased use and importance of Parks and Open Space. Data shows how there is discrimination in terms of outdoor access and less healthy parks available in neighborhoods of color, and lower economic standing. Evident in older Westminster which is the most diverse area of city yet park deficient. City must apply Policy 11.6.8 in full on all new development and serve the public needs for park.

8 hours ago

Like +1 Dislike

Water - All future City and Commercial improvements should reflect a strict water waste prevention plan. Grass which is planted for visual appeal and will never be used by the community should be banned. Plants and trees should be native to the dry plans Westminster is built on. Community residents should not subsidize golf course water usage. No future golf courses should be built in Westminster as the percentage of community representation is not reflected.

4 days ago

Like Dislike

Concerns of City Leadership

- Divergent community expectations
- Divisiveness and breakdown in civility
- Smart, well-planned growth
- Right balance of housing diversity
- Multi-modal transit
- Replacing the City's aging infrastructure
- Long-term financial sustainability - diversification of revenues
- Protection/conservation of the City's water quality and supply
- Meeting the needs of an increasingly diverse population
- Agreement and unity regarding core services and City priorities
- Adequate public safety resources and necessary funding for municipal courts



Source: 2021 Stakeholder Interviews

Concerns of City Council

- Strategically planning for “smart” growth
- Sustainability - fiscal, environmental, social
- Becoming a more diverse, inclusive and welcoming community
- Suburban neighborhoods and urban nodes
- Transportation options and connectivity
- Traffic congestion
- Protection and acquisition of open spaces
- Housing diversity, density and affordability
- Vibrant and thriving downtown
- Building out arts and culture offerings



Source: 2021 City Council Interviews

City Council Concerns

- Maintain Westminster's beauty
- Strong core services
- Everything related to water
- Stewardship of the public infrastructure
- Public distrust in government
- Changing demographics
- Completing development projects
- Expanding trails and recreation
- Rebounding from COVID with resilience
- Investing in public safety to keep residents safe
- Political divisiveness and divergent perspectives

Source: 2021 City Council Interviews



Most Significant Challenges

- Aging infrastructure
- Balancing growth with maintaining Westminster's character
- Financial sustainability
- Housing affordability
- Subsidizing development
- Water rates
- Increasing public distrust of government
- Divergent perspectives on key issues



Source: Stakeholder Interviews, 2021 Social PinPoint Ideas Wall

Most Significant Challenges

1. Cost of living/housing
2. Balancing population growth and new development
3. Cost of maintaining streets, infrastructure, and city facilities
4. Crime and safety
5. Becoming an inclusive community; economic recovery (tied)
6. Maintaining the services and programs currently offered
7. Traffic

**Listed in rank order*

Source: 2021 Social PinPoint Community Survey



Opportunities

- Expanding multi-modal transportation options
- Increasing housing diversity and options
- Protecting open spaces
- Taking a well-rounded approach to sustainability - fiscal, environmental, social
- Creating a thriving and vibrant Downtown
- Delivering core services well
- Improving relationship/engagement between City Hall and community
- Increasing arts and cultural offerings



Source: Stakeholder Interviews, 2021 Social PinPoint Survey (open-ended questions)

Opportunities

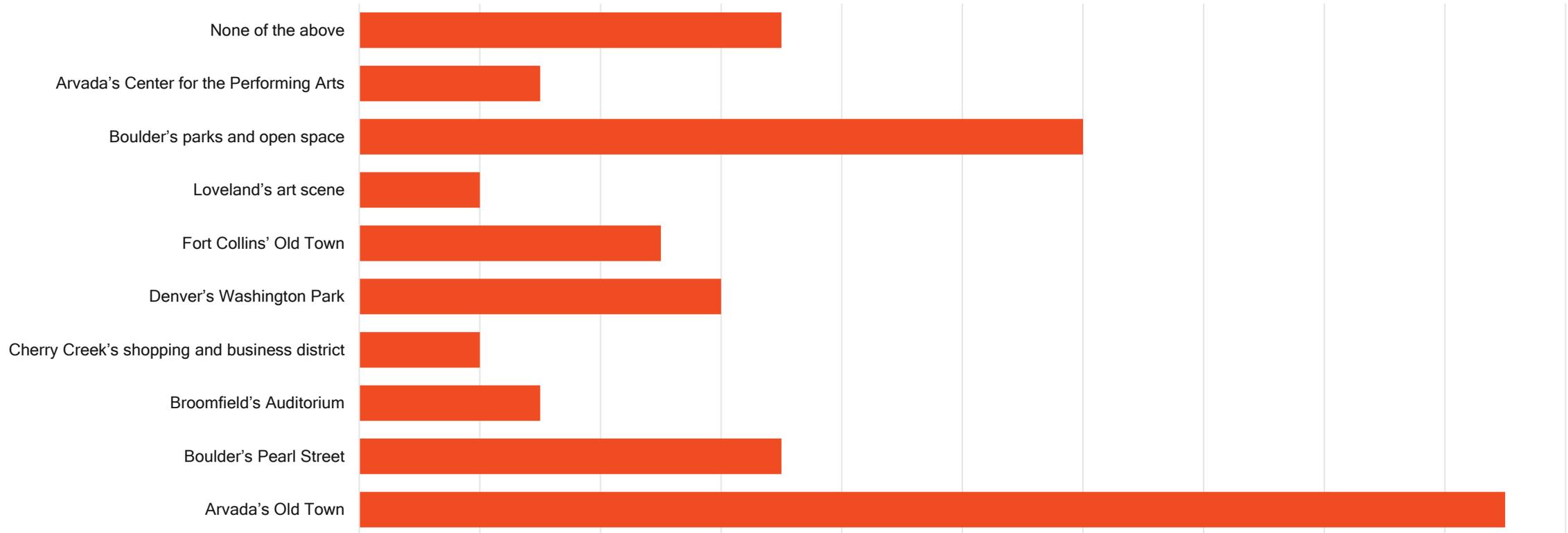
What types of businesses would you most like to see in Westminster?



Source: 2021 Social PinPoint Community Survey

Opportunities

If Westminster could adopt one thing from its neighbors, what would you prefer?



Source: 2021 Social PinPoint Community Survey

Important Actions to Improve Quality of Life

- 1 Build affordable housing
- 2 Expand/preserve open spaces, trails, and parks
 - Reduce development
- 3 Make public safety a priority
 - Improve mass transit and transit alternatives
- 4 Reduces taxes and water rates
 - Manage growth and development
- 5 Focus on the economy
 - Resolve traffic issues, speeding
 - Promote environmental sustainability



Source: 2020 Community Survey,
National Research Center, Inc.



WESTYRISE

RESILIENCE | INNOVATION | STRENGTH | EMPOWERMENT

Resident Advisory Resiliency Work Group

2021 Strategy Recommendations

Overview

The COVID-19 pandemic is one of the greatest crises of our generation, and recovery will require not only repair, but also innovation and vision. The WestyRISE Resident Advisory Work Group (Work Group) was brought together to envision a strong social and economic recovery from COVID-19 that is immediately actionable. To do this, the Work Group called upon community leadership and expertise and leveraged the Design Innovation (DI) process to co-create an inclusive vision for the City's future, while rapidly generating and testing innovative, actionable recommendations across six critical focus areas.

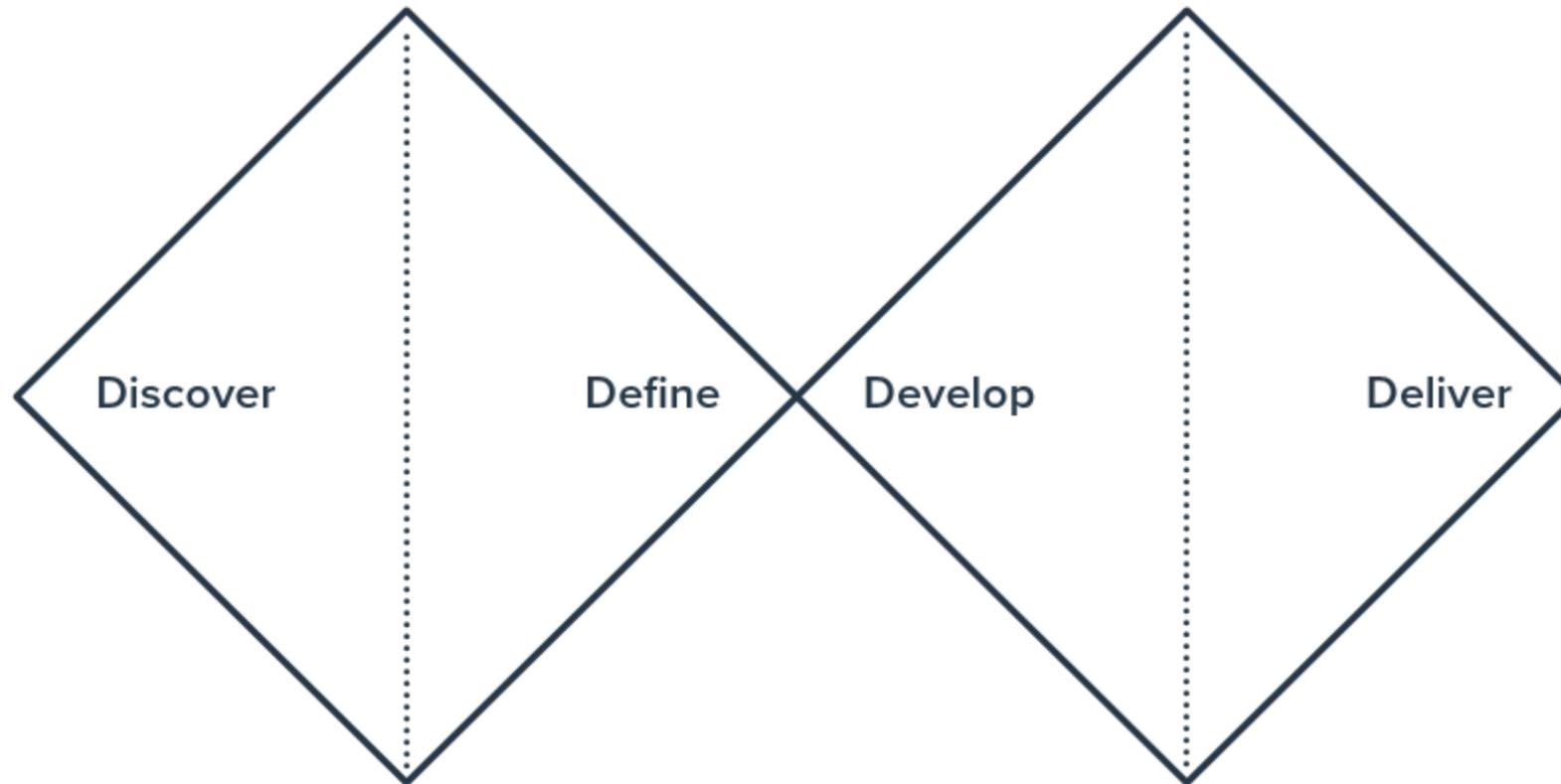
6
Teams &
Focus Areas

34
Work Group
Members

91
Stakeholders
Engaged

125
Participants
In Total

The Design Innovation Process



Teams & Focus Areas



- 1 Diversity, Equity & Inclusivity
- 2 Policy & Economic Stimulus
- 3 Physical, Mental & Emotional Health
- 4 Marketing & Business Development
- 5 Data & Technology
- 6 Sustainability

Diversity, Equity & Inclusivity



Diversity, Equity & Inclusivity

Vision

Westminster is a city that shapes its policy decisions and programs through the lens of diversity, equity, and inclusivity. In Westminster, the basic needs of all residents and families are met, and there is equitable access to all resources, such as affordable housing, high-speed internet, education, healthcare, and information. Westminster residents feel a sense of safety and belonging, and they can easily voice their hopes, concerns, and ideas to the city and have their voices heard.

Strategy

1. Commit to a Diversity, Equity & Inclusivity Lens in All Our Work
2. **Actively Involve Residents in Policy Development (Priority Recommendation)**
3. Promote Equitable Distribution of Resources & Access to Services

Policy & Economic Stimulus



Policy & Economic Stimulus

Vision

Residents and small businesses have access to capital and support to build long term success and resilience. Historic Westminster will be the home of a unique diversity of businesses, making it a vibrant place to live and shop. Historic Westminster has spaces where the residents feel they belong and can gather as a community. Every Historic Westminster resident can easily access delicious, healthy, affordable food. Communication flows freely between the city of Westminster and historically underrepresented residents.

Strategy

1. Promote Urban Agriculture and Establish Community Gardens
2. Promote Equitable, Multidirectional Communications
- 3. Mitigate Displacement of Residents and Businesses (Priority Recommendation)**
4. Support Business Models That Prioritize Community Over Profit
5. Provide Direct Technical and Financial Assistance

Physical, Mental & Emotional Health



Physical, Emotional & Mental Health

Vision

Westminster is a city where people's health needs are easily met, leaving them feeling connected and cared for, and allowing them to thrive. Because residents have effortless access to excellent health services, they never have to worry that they won't be able to meet their needs due to cost, inconvenience, complexity, or inadequate care. Residents impacted by COVID-19 or other health crises are fully supported in making a strong recovery.

Strategy

- 1. End Homelessness & Housing Insecurity (Priority Recommendation)**
2. Expand & Leverage the Library System to Increase Resource Access
3. Improve Access to Telehealth Services & Broadband Internet

Marketing & Business Development



Marketing & Business Development

Vision

City residents, area residents, and small business owners will know and be familiar with a simple, clear, understandable City brand that supports each of the six key economic areas as well as the City's recreation, shopping, dining and entertainment attractions. All City of Westminster small businesses are well informed about City of Westminster resources that may be of use to them including grants, education, marketing, networking opportunities, and safety certification programs. They are informed about this through a physical resource toolkit that is distributed annually that connects directly back to a well-organized, up-to-date virtual toolkit, and the City has many well-recognized placemaking locations that support locally owned businesses.

Strategy

1. Include Six Key Economic Areas in Brand Identity
2. Build & Deploy a Comprehensive Resource Toolkit
3. Catalyze Placemaking Through Partnerships
4. Appoint a Small Business Ambassador
5. Build a Volunteer Small Business Ambassador Team & Forum

Data & Technology



Data & Technology

Vision

The City of Westminster uses data effectively and proactively to make better policy decisions, improve operations, empower business, and inform citizens. Westminster ensures that underserved communities are represented in data and have quality access to information that's meaningful and helpful to them.

Strategy

1. Establish a Data Team & Governance
2. Promote Data Literacy & Culture in Government
3. Centralize Data Storage, Inventory & Request Handling
4. Expand Open Data Library & Improve Quality of Data Visualizations
5. Develop or Adopt a Resident Portal App for Data Collection & Sharing

Sustainability



Sustainability

Vision

The City of Westminster is a regional leader in improving air quality to support sustainability efforts and to improve public health, as well as a leader in zero-emissions, electric vehicle use, multi-modal transportation, and infrastructure that supports remote work.

Strategy

1. Lead With a Zero-Emission Fleet
2. Develop Electric Vehicle Incentives & Infrastructure
3. Encourage Reduced Emissions from Commercial Vehicles
4. Support Remote Work by Expanding Internet Access
5. Support Regional Transition to Zero-emission Transportation System

Environmental Scan Discussion

- What stood out in the presentation?
- Did you learn anything new?
- What made you pause with concern?
- What is missing or needs to be amplified?
- Which themes are the most important in shaping your thinking about the future direction of Westminster?



Strategic Plan Implementation Template

Mission: Providing superior services to elevate the quality of life, to cultivate community and encourage a thriving economy while preparing for the future.

Vision: In CLIENT, we envision a connected, conscientious, safe community with a small town feel in which all people and businesses can thrive.

Priority A: Quality of Life	<i>Ensure CLIENT continues to be a vibrant community that honors its heritage and provides a broad range of opportunities to live, work and play</i>							
Strategic Objectives	Focused Objectives	Outcomes	Lead	Team Members	Resources Required	Interdependencies	Start Date	Start Date
<i>Beautification of Arts and Culture</i>	Enhance community events to better reflect CLIENT diversity and demographics	Seek and support three new community events that reflect CLIENT diverse community						
	Create a strategic vision for arts within the community	Adopt an Arts Master Plan						
	Ensure that the CLIENT center remains a vibrant cultural centerpiece for the CLIENT by updating and modernizing center facilities	Install new sound and lighting system						
		Replace bench seating						
		Aesthetically improve						
	Enhance the Art in Public Places Program	Fund an art-on-loan program to complete the installation of art pieces at designated locations within the CLIENT						
<i>Economic Vitality</i>	Implement electronic plan review and permitting process	Electronic Plan Review and Permitting processes implemented						
		Reduce timeframes for plan review by 30%						
	Increase accessibility to businesses and essential services	Increase accessibility to businesses and essential services through						

Priority A: Quality of Life	Ensure CLIENT continues to be a vibrant community that honors its heritage and provides a broad range of opportunities to live, work and play							
Strategic Objectives	Focused Objectives	Outcomes	Lead	Team Members	Resources Required	Interdependencies	Start Date	Start Date
	through improvements to mobility and parking	improvements to mobility and parking						
		Implementation of a wayfinding sign program to direct the public to parking facilities to increase utilization of available parking lots and garages, with a goal of increasing occupancy of underused lots/garages by 50%						
	Implement policies and programs to expand the CLIENT's affordable housing opportunities	Adopt strategies to promote develop of affordable housing units, which may include fee waivers, density bonuses, inclusionary housing requirements, and streamlining of construction, with the goal of adopting three new strategies and/or programs						
	Encourage redevelopment efforts in the transit corridor	Work with developers to secure entitlements to redevelop the 12 acre CLIENT mall site to provide new commercial and residential opportunities that support the community and local economy						
<i>Historic Preservation and Small Town Feel</i>	Adopt Historic Design Guidelines to assist property owners with improvements to historic resources							
	Expand historic surveys to include areas that were not previously surveyed and properties with historically eligible buildings built in the 1950's and 1960's							

Priority A: Quality of Life	Ensure CLIENT continues to be a vibrant community that honors its heritage and provides a broad range of opportunities to live, work and play							
Strategic Objectives	Focused Objectives	Outcomes	Lead	Team Members	Resources Required	Interdependencies	Start Date	Start Date
	Promote the CLIENT's historic preservation programs through new, user-friendly educational materials							
<i>Parks, Recreation and Open Space</i>	Develop an assessment and improvement plan for CLIENT parks and open spaces that includes adherence to industry standards	Increased community satisfaction with the CLIENT's parks and open spaces, as measured periodically through a citizen survey						
	Promote awareness of recreational opportunities through a CLIENT-wide recreation newsletter	Implement a CLIENT-wide recreation newsletter						
	Enhance recreational program opportunities	Expand recreational program offers by 25%						

Priority B: Public Health and Safety	Enhance Services and programs so that all community members are safe, sheltered and have access to CLIENT core services							
Strategic Objectives	Focused Objectives	Outcomes	Lead	Team Members	Resources Required	Interdependencies	Start Date	Start Date
<i>Water/Wastewater/Solid Waste</i>	Complete Wastewater Treatment Plant Phase 2 Project Construction	Wastewater Plan upgrades completed						
	Reduce non-revenue water (water loss) by 25%	Reduce non-revenue water (water loss) by 25%						
	Complete upgrade project to ensure facility compliance	California upgrade project completed						
<i>Police</i>	Complete steps to prepare for construction of a police station	Steps for construction of new public safety facilities are identified						
	Reduce public safety response times by 10%	Improved police response time to emergency calls for service						

Priority B: Public Health and Safety	Enhance Services and programs so that all community members are safe, sheltered and have access to CLIENT core services							
Strategic Objectives	Focused Objectives	Outcomes	Lead	Team Members	Resources Required	Interdependencies	Start Date	Start Date
	Evaluate public safety workforce to determine if staffing levels are consistent with population growth. Develop a plan for workforce growth based upon results	Police staffing plan developed						
<i>Fire</i>	Complete process for the construction of additional fire stations which will maintain critical response times based on the distribution and concentration of resources and ensure that service level are being maintained based on call volume impacts, community growth and development	Locations for additional fire stations identified and procured						
	Provide additional emergency response personnel to ensure an effective response force is maintained to meet CLIENT development and population growth	Steps for construction of fire stations identified						
	Determine current and projected administrative staffing needs. Develop and implement administrative growth plan based upon findings	Fire staffing plan developed						
<i>Homelessness</i>	Develop and implement a method by which to measure the success of the Homeless Housing Plan	Method developed to measure success of the Homeless Housing Plan						

Priority C: Equity and Inclusion	Cultivate wide-ranging community engagement and a work force that strives to ensure everyone in the community has access to CLIENT services and facilities							
Strategic Objectives	Focused Objectives	Outcomes	Lead	Team Members	Resources Required	Interdependencies	Start Date	Start Date
Communication and Engagement	Evaluate alternative and/or additional means of communication to help ensure all parts of the community have the opportunity to receive, understand and participate in CLIENT life.	Develop and implement a Communications Plan by December 31, 2022						
		Method established to measure effectiveness of CLIENT's communication methodology to provide baseline for improvement in future years						
	Develop centralized messaging, outreach and awareness campaigns that focus on identifying and reaching all residents within the community	Develop and implement a Communications Plan by December 31, 2022						
Workforce	Provide diversity, equity and inclusion (DEI) training for all CLIENT staff	100% of CLIENT staff receive initial DEI training by December 31, 2022						
		Comprehensive employee training plan developed						
	Recruit, hire and train a diverse and inclusive workforce that represents the community	Establish baseline metrics for current staffing demographics in comparison to community						
		Identify gaps or areas of focus for future recruiting, hiring and training						
		Develop plan to address identified gaps						

Priority C: Equity and Inclusion	Cultivate wide-ranging community engagement and a work force that strives to ensure everyone in the community has access to CLIENT services and facilities							
Strategic Objectives	Focused Objectives	Outcomes	Lead	Team Members	Resources Required	Interdependencies	Start Date	Start Date
		Increased diversity of CLIENT workforce						

Priority D: Sustainability	Preserve and protect what makes CLIENT special by maintaining core services, infrastructure and community values							
Strategic Objectives	Focused Objectives	Outcomes	Lead	Team Members	Resources Required	Interdependencies	Start Date	Start Date
<i>Fiscal</i>	Develop a Long-Term Financial Plan that sustains core services and programs and help prioritize funding for new initiatives	Long-Term Finance Plan developed						
<i>Environmental</i>	Expand the non-potable water system	Four additional miles of non-potable water system constructed by December 31, 2024						
	Develop a landscape ordinance to provide guidelines for commercial and residential properties to include drought tolerant or water conservation measures	Landscape Ordinance adopted by December 31, 2023						
<i>Infrastructure</i>	Develop and implement Water and Wastewater Utility Master Plans to ensure facilities are improved and maintained to meet the needs of our expanding community	Water and Wastewater Utility Master Plans developed and implemented						
	Engineer and construct transportation facilities to accommodate all potential users- motorists, cyclists and pedestrians							
	Develop a facilities capital improvement program to ensure that adequate funding is planned for industry standard maintenance	Facilities capital improvement program developed						
<i>Workforce</i>	Create an onboarding plan for new employees	Onboarding program developed and implemented for new employees by January 2023						
	Create an employee retention plan that addresses career development and mid-career development	Employee Retention and Succession Plan developed and						

Priority D: Sustainability	Preserve and protect what makes CLIENT special by maintaining core services, infrastructure and community values							
Strategic Objectives	Focused Objectives	Outcomes	Lead	Team Members	Resources Required	Interdependencies	Start Date	Start Date
	Create a succession plan that addresses knowledge transfer	implemented by December 31, 2023						
<i>Climate Change</i>	Explore CLIENT initiatives to address the effect of climate change	Comprehensive climate change briefing delivered to the CLIENT Council by December 2023						

5. Work-Specific Knowledge

5.1 Credentials/Licenses/Certifications



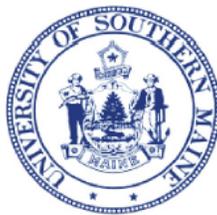
Seth D Hedstrom

has successfully completed the certificate program in:

Certificate Program in Lean Six Sigma Green Belt

Issued Date: 03/21/2015

Contact Hours/CEUs: 35.00 / 3.50



A handwritten signature in blue ink that reads "Susan Nevins".

Susan Nevins, Director

The Institute of Cultural Affairs

Certificate of Completion
Awarded to



Michelle Kennedy

for

Technology of Participation[®]
ToP[®] Facilitation Methods

Conducted by



American Planning Association CM: 14.

Barbara MacKay

August 15-16, 2007
Beaverton, Oregon

ToP[®] Trainers

Date



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Recipient details

Name Michelle Kennedy

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Badge details

Name ORGANIZATION DEVELOPMENT CERTIFIED CONSULTANT (ODCC)

Description This badge is awarded on the premise of professional competence and the completion of demonstrations, activities and examinations of the Organization Development Consulting Certification Program

Criteria

- Earned certification as an OD Consultant
- Earned the credentials "ODCC"
- Demonstrated advanced tools in the field of Organization Development
- Provided a major contribution to the field of OD through a client case study
- Gained global recognition as an expert in the field of OD

Users are awarded this badge when they complete **ANY** of the listed requirements.

- The following course has to be completed:
 - "Organization Development Consulting Certification Program"
- The following badge has to be earned:
 - "ODCC COMPLETED"

The Institute of Organization Development endorses the award of this badge to the holder as a representation of competencies enhanced and demonstrated in the stated program of study. IOD digital badges are issued based on the Institute's internal, subjective criteria of Global Standards which are evaluated at the time a badge is issued.

Badge expiry

Date issued Friday, 2 July 2021, 6:14 AM

Evidence This badge was issued for completing:

- The following badge has to be earned:
 - "ODCC COMPLETED"

Project Management Institute

THIS IS TO CERTIFY THAT

Charline Kirongozi

HAS BEEN FORMALLY EVALUATED FOR DEMONSTRATED KNOWLEDGE, SKILL AND THE UNDERSTANDING OF THE PROCESSES AND TERMINOLOGY AS DEFINED IN THE *PMBOK® GUIDE* THAT ARE NEEDED FOR EFFECTIVE PROJECT MANAGEMENT AND IS HEREBY BESTOWED THE GLOBAL CREDENTIAL

Certified Associate in Project Management (CAPM)®

IN TESTIMONY WHEREOF, WE HAVE SUBSCRIBED OUR SIGNATURES UNDER THE SEAL OF THE INSTITUTE



Tony Appleby
Chair, Board of Directors



Sunil Preshara
President and Chief Executive Officer



CAPM® Number: 2765879
CAPM® Original Grant Date: 22 May 2020
CAPM® Expiration Date: 21 May 2025





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Conducted by:

Karla Hill-Donisch
BethMarie Ward
ToP[®] Trainers

9/30/2021



5.2 Subcontractors

Due to the breadth and depth of our firm and project team, we are not proposing any subcontractors for the City's desired Scope of Work.

6.2.a. Failed to Complete a Contract

BerryDunn is pleased to state that we have not been terminated for cause within the last five years. As a firm, we regularly enter into multiyear contracts and at times efforts are completed sooner than anticipated. In those circumstances, we may close contracts sooner than the expiration date out of convenience and as a benefit to our clients.

6.2.b. Bankruptcy or Reorganization

We are pleased to state that we do not have any instances of bankruptcy or reorganization to report.

6.2.c. Judgement Claims or Lawsuits – Awarded or Pending in the Last Five Years

The firm is involved in litigation in one case unrelated to the consulting services we offer.

Inter-Lakes Health Inc. and related entities sued the firm in June 2006 in Essex County, New York (Index No. 000439-06) for return of fees paid to the firm. The case has not advanced beyond the discovery phase and the firm believes that the claims are baseless. There has been no activity in this case since the fall of 2010.

Appendix A. Resumes



Seth Hedstrom, PMP®, LSSGB

Principal

Seth is a principal in our Local Government Practice Group and lead of our Finance and Administration Practice. He brings 12 years of public-sector experience focusing on assisting

local government clients with organizational needs assessments and process improvement services, which includes analysis of the current state, recommendations for the future state, and planning the actions required to make the recommended improvements.

Specialty Areas:

Project Management: Seth has managed organizational needs assessment and process improvement projects for some of BerryDunn's largest local government clients, including the City of Cambridge, Massachusetts.

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

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

Select Clients:

Berks County, PA
City of Bloomington, MN
City of Gahanna, OH
City of Independence, MO
City of Milton, GA
City of Redlands, CA
Lake County, IL
Louisville/Jefferson County
Metro Government, KY
Monroe County, FL
Ottaway County, MI
Peoria County, IL
Saginaw County, MI
Village of Downers Grove, IL
Village of Oak Park, IL

Education:

Diversity and Inclusion
Certification, Cornell University

BS, Business Management,
Babson College

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

Lean Six Sigma Green Belt
Certified (LSSGB)

Memberships/Presentations:

Associate Member,
Government Finance Officers
Association (GFOA)

*ERP System Implementation
Best Practice Considerations,
Government Accounting and
Single Audits Conference,
September, 2020*



Shannon Flowers

Senior Consultant

Shannon is a senior consultant in BerryDunn's Local Government Consulting Practice Area. She is a finance professional with more than 20 years of experience, many of which have been spent in director, C-suite, and senior-level roles. Her expertise in budgeting, fiscal planning, cash flow analysis, and fiscal policy development is augmented by a strong understanding of the business processes that support efficient operations. As a consultant, her clients benefit from her focus in change management and business process improvement, as well as her experience in training and leading staff through difficult transitions.

Specialty Areas:

Process Improvement: Shannon served as the Operations Branch Chief for the Colorado Department of Public Health and Environment, Disease Control and Environmental Epidemiology Division. As such, she was the division authority for all fiscal, policy, procurement, and compliance matters. In this role, she led efforts in reviewing existing division processes, crafting recommendations for improvement, and implementing those recommendations with staff. This required substantial change management expertise to gain buy-in from staff and external stakeholders. Additionally, in her role as the Senior Fiscal Partner for the Governor's Office of Information Technology, she chaired the Business Process Improvement Committee and led process improvement initiatives for the Finance Department.

Strategic Planning: Throughout her career, Shannon has led strategic planning initiatives focused on developing plans that align with financial resources. She served as the Finance Director for the City of Central, Colorado, for 10 years and held the title of Senior Fiscal Partner for the Colorado Governor's Office of Information Technology. She helped both organizations develop and implement strategic plans that aligned with budgets. She served as the subject matter expert on budget development and performance measures, established cost models for proposed services, and developed long-range financial plans that aligned with strategic priorities and goals. While at the Colorado Department of Public Health and Environment, Shannon facilitated the division's first ever strategic planning process and developed the adopted strategic plan.

International Public Policy: Shannon lived in Bosnia and worked with the Atlantic Initiative identifying regional policies and best practices for civil rights campaigns. Shannon then went on to serve as the coordinator for the University of Denver's Global Practice Bosnia program for students. She served as in-country support and liaison for the program director, managing all of the program logistics, events, and excursions.

Select Clients:

City of Fort Collins, CO
City of Gresham, OR
City of Helena, MT
City of Redding, CA
City of Redlands, CA
City of Spokane Valley, WA
City of Westminster, CO
City of Wheat Ridge, CO
Doña Ana County, NM
Pitkin County, CO
Maine Municipal Association

Education:

MA, Global Finance, Trade and Economic Integration – University of Denver
BA, Anthropology, University of Colorado – Denver



Michelle Kennedy, Prosci® CCP, ODCC

Manager

Michelle is a manager in our Local Government Practice Group and brings 20 years of consulting experience in

community engagement, strategic and business planning, leadership development and executive coaching, OCM, program evaluation, business process improvement, and performance measurement. She has provided consulting services and project leadership for state and local government agencies in Oregon, Washington, Illinois, Texas, Nevada, California, Oklahoma, West Virginia, and Hawaii. Prior to consulting, Michelle served for 13 years as a senior-level executive in government and higher education.

Specialty Areas:

Strategic Planning: Michelle has developed strategic plans for more than 50 organizations. She actively involves and engages the community, as well as the organization, to gain views for the vision, mission, and goals and helps to prioritize initiatives to yield achievable and measurable outcomes. The majority of Michelle's strategic planning clients have retained her to provide updates to the plans in future years.

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

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

Select Clients:

City of Beaverton, OR
City of Cooper City, FL
City of Groveland, FL
City of Milton, GA
City of Tacoma, WA
City of Westminster, CO
City of Wausau, WI
Lake County, IL
Marion County, OR
McHenry County, IL
Oregon Department of Education
Oregon Department of Human Services
Oregon Harbor of Hope
Oregon Workforce Investment Board
Oregon Secretary of State
Washington State Traffic Safety Commission
Portland Development Commission
Portland State University
Marion County, OR
Washington-Oregon Americorps

Education:

BA, Journalism/Mass Communication, Iowa State University
Certified in the Hogan Leadership Assessment System®, the Myers Briggs Type Indicator®, and the ICA ToP Facilitation Methodology
Prosci® Certified Change Practitioner
Organization Development Certified Consultant (ODCC)

Memberships/Presentations:

Member, Organizational Development Network
Rivers of Change, Oceans of Opportunity: Strategic Planning in Turbulent Times, Oregon Recreation and Park Association (PRPA), 2019



Charline Kirongozi, MPA

Senior Consultant

Charline is a senior consultant in our Local Government Practice Group with four years of public-sector experience. She focuses on assisting public-sector clients with research and current environment analysis support. She joins BerryDunn with experience supporting and conducting field research, data collection, organizational reporting, and gap analysis and recommendations.

Relevant Experience

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

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

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

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

Select Clients:

City of Allen, TX
City of Brighton, CO
City of Cooper City, FL
City of DeSoto, TX
City of Groveland, FL
City of Lawrence, KS
City of Mansfield, TX
City of Milton, GA
City of Wausau, WI
City of Worcester, MA
City-County Information Technology Commission, WI
Galveston County, TX
Hamilton County, IN
Louisville/Jefferson County Metro Government, KY
Monroe County, FL

Education:

MPA, Clark University
BA, Political Science, Clark University



Maddison Powers Spencer, MPA

Consultant

Maddison is a consultant in our Local Government Practice Group. She has firsthand experience serving in the public sector and is familiar with the unique aspects of government operations. Notably, she has

been involved in various governmental initiatives, including those related to diversity, equity and inclusion; sustainability; and process and project analysis and management.

Relevant Experience

Local Government: Maddison is the former assistant to the city manager for the City of Covington, Georgia. In that role, she worked across city departments in an effort to manage priorities, develop recommendations, conduct research, support community needs, and develop reports for the city mayor and city council. In addition to working for the City of Covington, Maddison served as a senior fellow within the International City/County Management Association (ICMA) where she managed recruitment, hiring, and the interview process for two assistant city managers. She also led a leadership development initiative to develop more women leaders in the organization, and managed an annexation study where she interacted with various stakeholder groups to better understand the implications of service delivery.

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

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

Relevant Public Sector Experience

City of Covington, GA –
Assistant to the City Manager

City of Covington, GA –
Senior/ICMA Local
Government Management
Fellow

University of North Carolina at
Chapel Hill, NC – Local
Government Workplaces
Initiative Senior Graduate
Research Assistant

Town of Rolesville, NC –
Graduate Management and
Research Intern

Education and Certifications

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

BS, Political Science, Northern
Arizona University

Presentations

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