

	Berry Dunn	9XS Designs	Sbrand	Veridus
Evaluator 1	23	7	25	15
Evaluator 2	23	20	19	8
Evaluator 3	25	9	23	13
Evaluator 4	23	6	16	15
Evaluator 5	25	9	23	13

119	51	106	64
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Berry is clear choice for me. I think their proposal was extensive and I particularly liked the pinpoint site to encourage collaboration and community engagement throughout the process.

I also like the optional impelmentation and action planning component which I think we'll need

Berry Dunn - Provided more than enough information to decipher.

Provided extensive list of relative and neighboring references and experiences.

Seems to be a very traditional company with traditional tasks and phases, doesn't necessarilly raise the bar.

9XS - Has great urban design methods, and raises the bar for traditional goals.

Doesn't provide as many references at a large scale.

9XS: Lansing? /ignored schedule/lack of experience/references/outreach thin

Sbrand: applicable references/ignored length limit/applicable projects thin

Sbrand - Provided extensive amount of relevant projects in Google Drive.

Veridus: Thin on similar experience/references thin/Chat GPT as resource?

Veridus - Short RFP. Community engagement offerings are things we already implement.

Not bringing new ideas or approaches.

PROPOSAL

PROPOSAL TO THE:

City of Novi, Michigan

REQUEST FOR PROPOSALS FOR:

**Facilitation Of Community
Strategic Planning Process**

SUBMITTED BY:

Berry, Dunn, McNeil & Parker, LLC

Seth Hedstrom

Proposed Project Principal

Berry, Dunn, McNeil & Parker, LLC
shedstrom@berrydunn.com

Jen Ferguson

Proposed Project Manager

Berry, Dunn, McNeil & Parker, LLC
jen.ferguson@berrydunn.com

Proposal Submitted On:

January 21, 2025 before 4 p.m. EST.



REQUEST FOR PROPOSALS FOR:

Facilitation Of Community Strategic Planning Process

PREPARED FOR:

Novi, Michigan
Victor Cardenas, City Manager
Finance Counter, 2nd Floor
City of Novi
45175 Ten Mile Road
Novi, MI 48375

PREPARED BY:

Berry, Dunn, McNeil & Parker, LLC
2211 Congress Street
Portland, ME 04102
207.541.2200 | berrydunn.com

POINT OF CONTACT:

Seth Hedstrom, Principal
Berry, Dunn, McNeil & Parker, LLC
shedstrom@berrydunn.com

“BerryDunn” is the brand name under which Berry, Dunn, McNeil & Parker, LLC and BDMP Assurance, LLP, independently owned entities, provide professional services in an alternative practice structure in accordance with the AICPA Code of Professional Conduct. BDMP Assurance, LLP is a licensed CPA firm that provides attest services, and Berry, Dunn, McNeil & Parker, LLC, and its subsidiary entities provide tax, advisory, and consulting services.

Berry, Dunn, McNeil & Parker, LLC provides staff and other administrative resources to BDMP Assurance, LLP. If engaged, BDMP Assurance, LLP will lease professional and administrative staff, both of which are employed by LLC, in performing its services. These individuals will be under the direct control and supervision of BDMP Assurance LLP, which is solely responsible for the performance of our engagement.

The entities falling under the BerryDunn brand are independently owned and neither entity is liable for the services provided by the other entity. Our use of the terms “our Firm” and “we” and “us” and terms of similar import denote the alternative practice structure of Berry, Dunn, McNeil & Parker, LLC and BDMP Assurance, LLP.

This proposal is the work of Berry, Dunn, McNeil & Parker, LLC and is in all respects subject to negotiation, agreement, and signing of specific contracts.

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a. Letter of Transmittal

January 21, 2025

City of Novi, Michigan
Attn: Victor Cardenas, City Manager
Finance Counter, 2nd Floor
45175 Ten Mile Road
Novi, MI 48375

Dear Victor Cardenas and Members of the Selection Committee:

On behalf of BerryDunn, I am pleased to submit this proposal in response to the City of Novi's (the City's) request for proposals (RFP) for the Facilitation of a Community Strategic Planning Process. We have read the City's request and reviewed its terms, conditions, and the contents presented therein. Our proposal is a firm and irrevocable offer valid for 60 days from the submission deadline of January 21, 2025.

BerryDunn is a nationally recognized professional services firm, headquartered in Portland, Maine, with 10 office locations. We are focused on **inspiring organizations to transform and innovate** and have lived our core values and preserved our reputation for excellence throughout our 51-year history. Our firm's culture is centered on a deep understanding of our clients' commitment to serving the public.

We understand that Novi 2050 will identify the City's attributes and clarify its vision, goals, and strategies to proactively build a bright future. The selected consultant will collect and interpret data and engage City employees, Steering Committee members, and community stakeholders to develop a collaborative plan. We have reviewed the City's Preliminary Schedule, and we will work with the City to create a final phased project schedule to which we will adhere.

We possess several attributes that other proposers would be troubled to match:

Complete toolbox of stakeholder engagement and consensus building techniques	Strategic planning experience built across the nation, including projects in Michigan and the Midwest	Certified, highly experienced teams who work with a wide variety of stakeholders	Actionable, measurable implementation plans that set clients up for success	Three decades of experience to guide the City through a successful strategic planning process
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We are confident that if BerryDunn is chosen to partner with the City on this important initiative, the City will experience the Strategic Planning Process it desires.

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

Sincerely,

Seth Hedstrom, PMP®, LSSGB, Principal
Berry, Dunn, McNeil & Parker, LLC
2211 Congress Street, Portland, ME 04102-1955
t: 207.541.2212 | e: shedstrom@berrydunn.com

b. Statement of Addendum

We verify that we have received and reviewed Addendum #1 (bidders' questions with answers), Attachment A (Contract Example for Professional Services), and Addendum #2 (due date extended). As of submission on January 22, there are no additional addenda.

c. Qualifications and Experience

c.1. Firm Overview

BerryDunn is the brand name under which Berry, Dunn, McNeil & Parker, LLC and BDMP Assurance, LLP, independently owned entities, provide services. Since 1974, BerryDunn has helped businesses, nonprofits, and government agencies throughout the U.S., its territories, and Canada solve their greatest challenges. The firm's tax, advisory, and consulting services are provided by Berry, Dunn, McNeil & Parker, LLC, and its attest services are provided by BDMP Assurance, LLP, a licensed CPA firm.

BerryDunn is a client-centered, people-first professional services firm with a mission to empower the meaningful growth of our people, clients, and communities. Led by CEO Sarah Belliveau, the firm has been recognized for its efforts in creating a diverse and inclusive workplace culture and for its focus on learning, development, and well-being. [Learn more at berrydunn.com](https://www.berrydunn.com).

BerryDunn was formed in 1974, currently with 73 principals, 37 owners, and 10 office locations. We have experienced sustained growth throughout our [51-year history](#).

We employ more than 935 staff members—including more than 335 in our Consulting Services Team. From extensive project experience for more than 650 state, local, and quasi-governmental agencies, our team brings valuable perspectives to every engagement. Additionally, our team has experience serving state and local government agencies, providing them with an in-depth understanding of government operations, staffing needs, budgetary constraints, and the business processes required to provide necessary services to the internal divisions and the constituents the City serves.

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

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

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

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



Enterprise Organizational
Development



Parks, Recreation,
Libraries



Enterprise Digital
Transformation



Community Development
and Utility Operations



Technology
Management



Health and
Community Services



Justice and
Public Safety

Specialized Expertise of the Enterprise Organizational Development Practice

BerryDunn's dedicated Enterprise Organizational Development Practice offers both an intimate project experience and a national perspective to support our clients' desire to transform and innovate. We recognize how important it is that the City establishes partnership with a firm that understands that work of this level of impact requires a guided hand and a tailored approach to meet them where they are and lead them to where they want to go.

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

Our efforts are centered on sound partnership with our clients. We guide projects at various stages and take the time to properly gauge availability and resources to help ensure our clients receive consistent, reliable, and quality service.

Firm Principals

In response to the City's request, we provide a list of our firm's 73 principals below and on the following page. This proposal is made without collusion with any other person or entity submitting a proposal pursuant to this RFP.

- | | | |
|------------------------|-----------------------------|------------------------------|
| • Regina Alexander | • Ryan Doil | • Mark R. LaPrade |
| • Peter Alfrey | • Mary Dowes | • Charles K. Leadbetter, III |
| • Divyakumar Arulsamy | • Christopher S. Ellingwood | • Robert Leonard |
| • Katharine E. Balukas | • Jennifer Elwood | • Matthew Litz |
| • Sno L. Barry | • William G. Enck | • Michael J. Mastroianni |
| • Nicole Y. Becnel | • David A. Erb | • Yoko H. McCarthy |
| • Sarah L. Belliveau | • Jason Favreau | • Barbara J. McGuan |
| • Shea Berry-Brennan | • Jason A. Fournier | • Tammy P. Michaud |
| • Renee Bishop | • Melody Mann Fox | • Brandon L. Milton |
| • William H. Brown | • Gary Glassman | • Christopher M. Mouradian |
| • Tammy J. Brunetti | • Ryan Gough | • Lisa M. Openshaw |
| • Michel Caouette | • Jonathan Grace | • Dimitrios Panacopoulos |
| • Andrea J. Colfer | • Seth Hedstrom | • Emily B. Parker |
| • Tucker X. Cutter | • Mary E. Jalbert | • Kathy Parker |
| • Eduardo G. Daranyi | • Michael F. Jurnak | • Danielle Pelleteir |
| • Clinton E. Davies | • William S. Kalinowski | • Kristin Perry |
| • Scott Davis | • Julie A. Keim | |
| • Kati A. Denham | • Lisa Kennedy | |
| • Todd J. Desjardins | | |



Embracing Diversity, Equity, and Inclusion (DEI)

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

- Kevin Price
- Susan Prior
- Jodi Reynolds
- William A. Richardson
- Jeffrey A. Ring
- Zachary J. Rioux
- Denny R. Roberge
- Linda L. Roberts
- Douglas J. Rowe
- Cameron A. Scott
- Leah Shanahan
- Robert S. Smalley
- Charles D. Snow
- Julianne A. Sullivan
- Lisa Trundy-Whitten
- Daniel T. Vogt
- Tyler Waldrup
- Jeffrey D. Walla
- Ryan T. Warren
- Seth E. Webber

Relevant Experience

Commitment to the State

With BerryDunn, the City will be served by a firm and project team members who have **demonstrated their commitment to the State** through similar and other types of consulting engagements. Below, we share our clients in the State.

- Bloomfield Township
- City of Ann Arbor
- City of Detroit
- City of Mt. Pleasant
- City of Saline
- City of Traverse City
- Detroit Wayne Integrated Health Network
- Grand Rapids Community College
- Kalamazoo County Finance Department
- Macomb Community College
- Marquette County
- Michigan Department of Education
- Michigan Department of Health and Human Services
- Oakland University
- Ottawa County
- Saginaw County
- Schoolcraft Memorial Hospital
- Township of Canton
- Washtenaw County
- Wayne State University

We also take pride in our local presence, as we have several employees who reside in the State and/or have worked in State's local government landscape. We will leverage their insights, expertise, and locality when and where it will most benefit the City.

Strategic Planning

BerryDunn has been offering strategic planning services for over 30 years and has worked with a long list of local government clients. Through this experience, we have assisted a wide range of clients with various services related to those requested by the City.

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

- Bloomfield Township, Michigan
- City of Apopka, Florida
- City of Beaverton, Oregon
- City of Blue Springs, Missouri
- City of Capitola, California
- City of Colorado Springs, Colorado
- City of Cooper City, Florida
- City of Creswell, Oregon
- City of Edgewater, Colorado
- City of St. Charles, Illinois
- City of Washougal, Washington
- City of Waukesha, Wisconsin
- City of Wausau, Wisconsin
- Weld County, Colorado
- City of Westminster, Colorado
- DuPage County, Illinois
- Erie Housing Authority, Pennsylvania
- Jefferson County, Washington

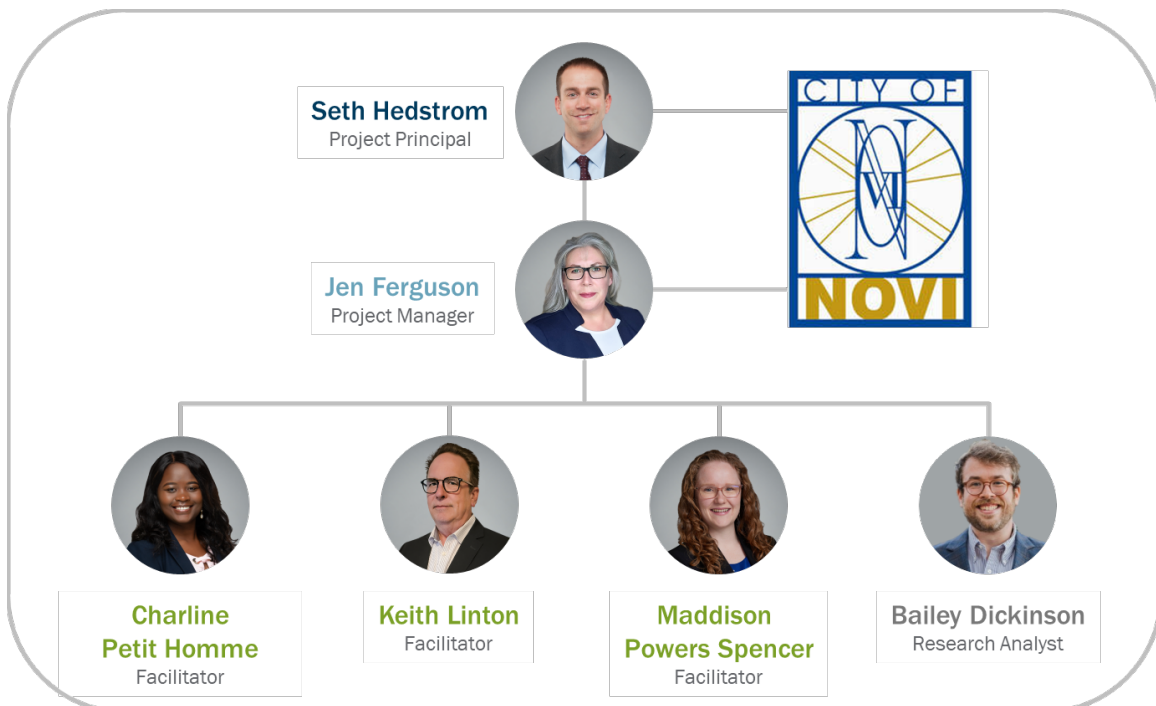
- City of Ennis, Texas
- City of Foley, Alabama
- City of Gresham, Oregon
- City of Groveland, Florida
- City of Homestead, Florida*
- City of Janesville, Wisconsin
- City of Lauderhill, Florida
- City of Margate, Florida
- City of Menifee, California
- City of Milton, Georgia
- City of New Braunfels, Texas
- City of Peoria, Illinois
- City of Port Arthur, Texas
- City of Redlands, California
- City of Santa Monica, California
- Lake County, Illinois
- Lancaster County, Nebraska
- Lane County, Oregon
- Marquette County, Michigan
- Milwaukee County, Wisconsin
- Onslow County, North Carolina
- Orange County, North Carolina
- Santa Clara County, California
- St. Johns County, Florida
- Tompkins County, New York
- Town of Chelmsford, Massachusetts
- Town of Holliston, Massachusetts
- Vancouver Housing Authority, Washington
- Washington County, Minnesota

c.2. Project Team

Organizational Structure

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

Figure 1: Project Team Organizational Structure



Roles, Responsibilities, and Qualifications

Below and on the following pages, we list our project team members' experience, qualifications, and expertise as they relate to projects of this nature and work with comparable local government clients. Our project team members' full resumes can be found in **Appendix A** for further review.



Seth Hedstrom, PMP®, LSSGB | Project Principal

Berry, Dunn, McNeil & Parker, LLC

Seth is a principal and the leader of our Local Government Practice Group. He brings extensive experience in project management. He has served as project principal on nearly all BerryDunn's organizational development projects and has managed more than 75 enterprise process and technology planning projects over the course of 15 years with BerryDunn. Seth has led our clients through many of the complex decision points and issue-resolution processes typical of large-scale planning and improvement projects and facilitated effective change. His experience includes providing oversight of strategic planning projects, assessing and documenting current environments, benchmarking with similar organizations, introducing industry best practices, developing recommendations, conducting organizational and operational assessments, and implementing and operationalizing plans and outcomes.

As the **project principal**, 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



Jen Ferguson, MPA | Project Manager

Berry, Dunn, McNeil & Parker, LLC

Jen is a senior consultant in our Local Government Practice Group. She has over 25 years of public-sector experience and significant expertise in strategic and financial planning. Jen has led, planned, and coordinated fiscal affairs for cities across Washington and Minnesota, holding influential leadership positions such as city administrator, director of finance, and executive director for an economic development authority. Supplementing her background in public-sector administration, Jen is well versed in, organizational development, performance management, operations and process improvement, economic and business development, enterprise resource planning implementations, and is certified in the Institute of Cultural Affairs (ICA) Technology of Participation (ToP®) facilitation methodology.

As the **project manager**, Jen will:

- Build and maintain a productive relationship with the City
- Design the facilitation approach to the strategic planning process
- Serve as the City's primary point of contact
- Facilitate the Strategic Planning Sessions and interviews
- Lead our work and perform day-to-day project management and staff oversight
- Present findings and the Final Novi 2050 Strategic Plan
- Develop and maintain the Project Work Plan and Schedule
- Lead implementation planning efforts
- Lead the analysis and development of project deliverables
- Provide subject matter expertise



Charline Petit Homme, MPA, Prosci® CCP | Facilitator

Berry, Dunn, McNeil & Parker, LLC

Charline is a manager in our Local Government Practice Group and is particularly skilled in leading clients through complex transformational initiatives, including strategic planning projects. She is a strong facilitator and is certified in the ICA ToP® facilitation methodology. Her experience also includes organizing and leading groups through the adoption of new ideas and concepts, and promoting buy-in. She brings in-depth knowledge and involvement with strategic planning, change management, and relationship building through her strong communication, leadership, and project management skills. She is especially skilled at facilitating stakeholder engagement efforts and synthesizing outcomes to optimize results for her clients. Prior to joining BerryDunn, Charline spent multiple years serving the public sector, supporting and conducting field research, data collection, organizational reporting, gap analysis, and recommendations development. She leverages her experience to provide firsthand insights and lessons learned in her consulting engagements.



Keith Linton, PMP®, ITIL (F) | Facilitator

Berry, Dunn, McNeil & Parker, LLC

Keith is a senior consultant in our Local Government Practice Group. Keith specializes in addressing complex issues by providing resolutions in a fair, concise, and transparent manner. He focuses on managing stakeholder expectations by developing solid internal and external business relationships, and he excels at maintaining a focus on the big picture vision while managing details to meet organizational goals and objectives. As a proud resident of neighboring Farmington Hills, Keith will serve as an active local presence and provide unparalleled insights to the City based on his previous work with similar clients.



Maddison Powers Spencer, MPA | Facilitator

Berry, Dunn, McNeil & Parker, LLC

Maddison is a senior consultant in our Local Government Practice Group. She leverages her firsthand public-sector experience as an assistant to the city manager to support clients and drive successful projects. Certified in the ICA ToP® facilitation methodology, she is adept at leading community and employee engagement efforts and synthesizing outcomes to enhance client results. Maddison's strong communication, leadership, and project management skills complement her ability to conduct current environment assessments, analyze data, and organize and facilitate groups. She has assisted with the development of over 30 local government strategic plans.

As the **facilitators**, Charline, Keith, and Maddison will:

- Work with our proposed project manager to design the facilitation approach to the strategic planning process
- Participate in meetings with leadership
- Facilitate interviews, Community Visioning Forums, and Strategic Planning Sessions
- Contribute to deliverable development



Bailey Dickinson, MPA | Research Analyst

Berry, Dunn, McNeil & Parker, LLC

Bailey is a consultant in our Local Government Practice Group. His extensive background in the public sector has equipped him with a deep understanding of strategic planning within local government organizations. Serving as special projects coordinator for the City of Covington, Georgia, he led cross-departmental strategic initiatives and managed award-winning community

engagement projects. Bailey's project management, research, and analysis experience contribute to his skill at advancing strategic planning efforts in local government environments.

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

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

Additional Resources

As mentioned, the subject matter experts (SMEs) introduced on the following pages are only representative of our broader pool of more than 335 consulting resources. This pool is composed of highly specialized and skilled public-sector consulting professionals whose expertise can be leveraged and support can be drawn upon as needed during the City's strategic planning project.



James Mickle, CPSI, CPRP | DEI SME
Berry, Dunn, McNeil & Parker, LLC

James is a manager in our Local Government Practice Group and a Certified Park and Recreation Professional (CPRP). He is particularly skilled and experienced in municipal and nonprofit parks and recreation operations and DEI strategy development. James has over 20 years of experience in recreation operations, programming, and administration, volunteer board leadership, community, and employee engagement and Commission for Accreditation of Park and Recreation Agencies (CAPRA) accreditation and reaccreditation. Throughout his career he has concentrated on facility management, youth and teen civic engagement, facility management and active older adults comprehensive planning. He is a collaborative leader with dedication to partnering with coworkers to promote an engaged and empowering work culture.



Khara Dodds, MCRP, AICP | Community Development and DEI SME
Berry, Dunn, McNeil & Parker, LLC

Khara is a manager in BerryDunn's Local Government Practice Group. She is an American Institute of Certified Planners (AICP)-certified planner with more than 13 years of leadership experience and 20 years of planning and community engagement experience. She believes in the potential of community development to empower communities and positively impact quality of life. Khara leverages her experience in city and regional planning to assist clients as they assess existing policies and processes, collect and evaluate stakeholder input, and identify and implement recommendations for improvement. Khara has a demonstrated commitment to leading DEI efforts. She is a member of BerryDunn's CEO Council on Diversity, Equity, Inclusion, Belonging, and Access (DEIBA)'s systemic barriers subcommittee and is certified in Equitable Community Change through eCornell University. She also supports DEI efforts and training through the American Planning Association (APA). In the public sector, she led multiple community equity projects, recommended the declaration of racism as a public health crisis, led affordable housing initiatives, worked with underserved neighborhoods on improvement and revitalization, and secured economic development incentives for large development projects.



Jason Genck, MPA, CPRP | Parks, Recreation, Libraries, and Community Services SME
Berry, Dunn, McNeil & Parker, LLC

Jason is a manager in our Local Government Practice Group and has more than 26 years of experience in the community services industry—including the areas of parks, recreation, and libraries. He is an expert in the field and regularly speaks at conferences such as those hosted by the National Recreation and Parks Association and the Colorado, Illinois, and Oregon Park

associations. Prior to joining BerryDunn, Jason served as the executive director for the City of Westminster, Colorado's three-time national Gold Medal Parks, Recreation & Library Department. During and prior to this time, he oversaw the development of numerous strategic plans and led strategic planning efforts for counties, non-profits, and special districts.



Michele Weinzetl, Ed. D., Prosci® CCP | Justice and Public Safety SME

Berry, Dunn, McNeil & Parker, LLC

Michele is a senior 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.



Keri Ouellette, MCRP, AICP | Planning Services SME

Berry, Dunn, McNeil & Parker, LLC

Keri is a manager in our Local Government Practice Group and an expert in community development operations. She joined BerryDunn after 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.



Jesse Myott, MA | Finance SME

Berry, Dunn, McNeil & Parker, LLC

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



Corey Claflin | Health and Human Services (HHS) SME

Berry, Dunn, McNeil & Parker, LLC

Corey is a manager in our Local Government Practice Group and leads our Health and Community Services Practice, which assists municipal and county public health and HHS agencies as they seek to improve the quality of life of their communities. In this role, Corey leads both technology projects—such as electronic health record (EHR) needs assessments, system selections, and implementations—and organizational development initiatives—such as strategic plans and executive coaching. Corey specializes in carefully crafting teams of subject matter experts and executing an approach that is tailored to the unique needs of each client.

c.3. Approach and Work Plan

Understanding the City's Needs

The City of Novi is embracing what it means to be an economic and commercial hub. The City's population is thriving; locals enjoy abundant employment opportunities, a healthy economy, and excellent schools, while businesses benefit from the region's highly skilled workforce and geographic accessibility. There are many reasons to take pride in and celebrate calling Novi home.

With over 66,000 residents today, Novi's appealing qualities have led to significant population growth in recent years. As this growth continues, Novi is committed to developing its strong economy, maintaining an excellent quality of life, and celebrating its identity. The City is proactively preparing for the future by initiating its current Long-Range Strategic Planning Process. The consulting team, leveraging their expertise with local governments, will facilitate an innovative planning process that brings together City, agency, and resident stakeholders to articulate the City's vision, values, needs, goals, and opportunities. These guideposts will be used to produce the Novi 2050 Strategic Plan. The planning process and final plan will be inclusive, forward-thinking, and actionable.

BerryDunn is excited at the prospect of partnering with the City on Novi 2050. Our firm not only brings unmatched strategic planning and organizational development expertise, but also breadth and depth in terms of the additional resources we can contribute to the requested work effort. We can confidently say that we understand the needs and aspirations the City may have at the enterprise and department levels. As such, we are well positioned to develop an active and engaging planning process that considers all facets of Novi's organization and delivers the values-driven living plan the City is looking for. We bring a proven process—one that has been refined over the course of 30 years and 70 strategic plan development projects—that will help ensure the project remains on time and on budget while progressing at a healthy pace and maintaining momentum in the work effort.

Approach and Guiding Methodologies

Our project team will engage the City's various stakeholders in ways that will maximize creativity and innovation and inspire collaboration and consensus for achieving its vision, including:

- Elected/appointed officials
- Staff
- Residents
- Community groups
- Major employees
- Key partners, such as school districts and nonprofit community

It is our goal to help the City develop a strategic plan that can reasonably be implemented with support and commitment from these stakeholders and others. A strategic plan is a living document that remains applicable, helps to navigate in times of organizational changes, and defines the organization's reason for being. It establishes a clear and compelling vision; sets measurable objectives and lays out the desired impact on and value added to entire communities—residents, business, employees, and other stakeholders; and helps set a direction and focus and assists in aligning resources to accomplish strategic objectives.



The North Star Vision

An organization's North Star Vision serves as a unifying focal point for long-

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

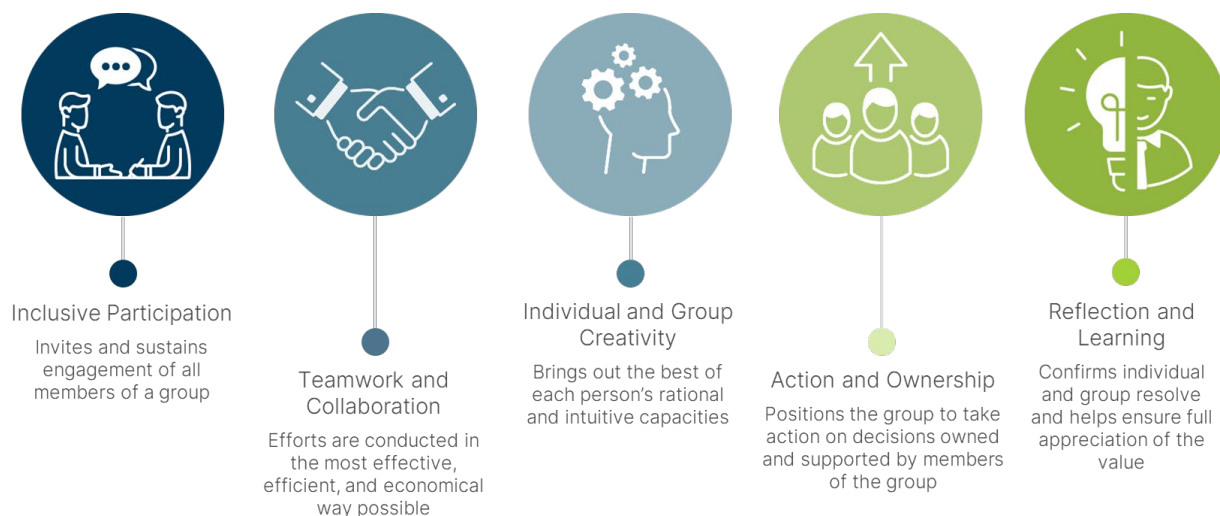
Having a clear, concrete strategic direction will help keep the City on track and focused on what is important when challenges, setbacks, and unanticipated events occur. It also helps ensure decisions, policies, plans, programs, and processes are designed through the lenses of stewardship of resources,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

Achieving Consensus and Quickly Moving Groups to Action

We will design and conduct a well-facilitated strategic planning process that uses data and personal knowledge to assess the City's environment. Our project team will use the ICA ToP® facilitation methodology to help ensure the City's strategic planning sessions are highly collaborative and inclusive of all stakeholders.

The ToP® methodology emphasizes structured participation that pulls information into the group's thinking process and creates a clear intention, helping members of the group align with one another and reach consensus. Structured participation encourages the values shown in Figure 2 below.

Figure 2: Values Encouraged by Structured Participation as Defined by the ICA ToP® Facilitation Methodology



Encouraging Crossing Boundaries and Strengthening Interdependencies

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

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 clear, compelling strategic plans for 70 public-sector entities and system-level plans involving multiple levels of government,

jurisdictions, and agencies. Our clients use these plans to drive budget decisions, execute strategies, and publish the results to communicate with stakeholders and the public.

Focusing on DEI

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

With the City serving as a backbone organization, we will engage current partners to facilitate an authentic, inclusive, and accessible planning process. We have found great success in this collaborative approach to assembling the ideal team. For example, after being selected to lead the **City of Wausau, Wisconsin**, in the development of their strategic plan, the City connected us with a local member of the Hmong community to provide valuable perspective and considerations in the process. Additionally, in our work with **DuPage County, Illinois** in the development of their strategic plan, BerryDunn's DEI sub-consulting partner worked with our team to help advance the County's DEI and community engagement efforts. This involved successfully expanding the overall reach to underrepresented populations and incorporating the voices of those that have been marginalized in the past into the strategic planning process.

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

Effectively Engaging the Public

We will utilize several strategies to effectively engage and collect data and information from the public, including developing communications and appropriate messaging, conducting interviews and 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 tool has several features that we use frequently and as needed throughout strategic planning projects, such as forums, mapping, an ideas wall, and surveys. It is also important to note that Social Pinpoint is mobile friendly and has Google Translate interface.

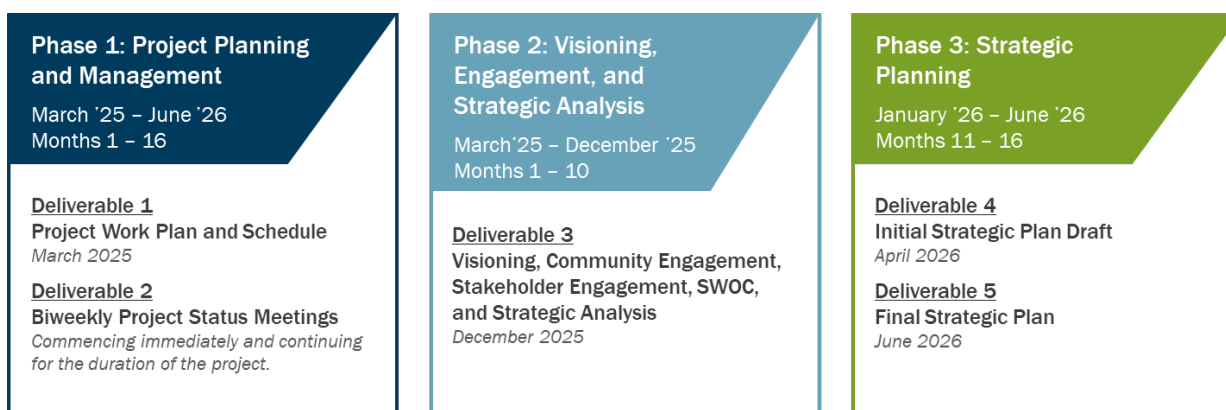
With this tool, we will easily be able to set up a landing page and sub-pages for the City to capture the culture of the stakeholders it serves—providing opportunities for participants to contribute to the City's mission, values, vision, and strategic priorities. We will also be able to track analytics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

We recently developed fully customized Social Pinpoint sites to support **Bloomfield Township, Michigan**, and the **City of Port Arthur, Texas**, as well as others.

You will find our work plan, which is rooted in the methodologies and strategies described, in Section e.

c.4. Project Timeline

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



c.5. Cost

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

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

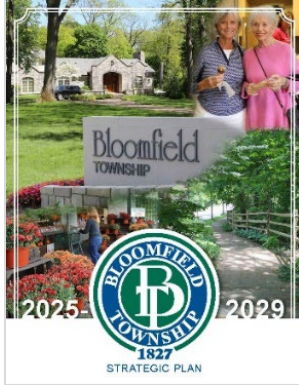
Table 1: Cost by Project Phase

Phase	Fixed-Fee Services Cost
Phase 1: Project Planning and Management	\$16,500
Phase 2: Visioning, Community Engagement, Stakeholder Engagement, and Strategic Analysis	\$63,500
Phase 3: Strategic Planning	\$39,800
Total Fixed-Fee Services Cost	\$119,800
Optional Phase 4: Implementation and Action Planning	\$20,600
Travel expense estimated allocation*	\$9,500

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

c.6. References

The greatest testament of our high-quality work is the expressed satisfaction shared by our clients. Below, we describe and provide contact information for several, recent projects for the City's consideration. These clients can speak well to the quality and satisfaction we deliver on comparable engagements.

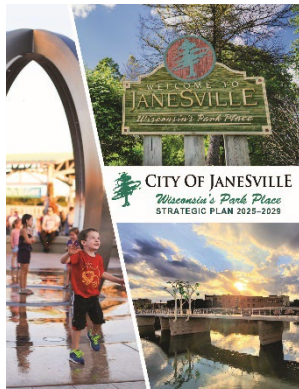


Charter Township of Bloomfield, Michigan

Michael Schostak, Bloomfield Township Treasurer
248.433.7705 | mschostak@bloomfieldtwp.org

Bloomfield Township engaged BerryDunn to help update its Strategic Plan. The Township sought a thorough and inclusive planning process that involved a wide range of stakeholders, such as Township leadership, residents, and business owners. Our work included conducting interviews, leading visioning workshops, and analyzing demographic, economic, and community data. Additionally, we developed a customized Social Pinpoint site to facilitate community engagement. The Final Strategic Plan was adopted in October 2024. It defines a shared vision for the future and focuses the Township's resources, goals, and objectives on five

priorities: Vibrant Lifestyle, Welcoming Community, Enhance Community Character, Reliable Infrastructure, and Best-in-Class Government.

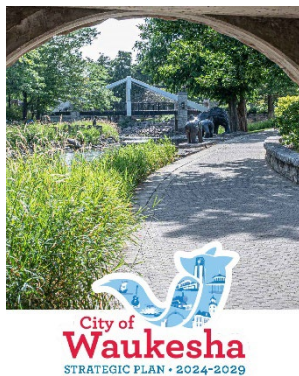


City of Janesville, Wisconsin

Nicholas Faust, Assistant to the City Manager
608.755.3103 | faustn@ci.janesville.wi.us

The City of Janesville selected BerryDunn to lead the development of a new five-year strategic plan. With a rich regional history as a commercial and industrial hub, Janesville sought to align its policy priorities and budget allocations with the evolving needs of its residents and businesses. To support this, we conducted interviews with the city manager, department heads, and City Council members and facilitated stakeholder focus groups. We also developed a customized Social Pinpoint site to engage the community in shaping Janesville's future. Through a

collaborative process, we performed an environmental scan and strengths, weaknesses, opportunities, threats (SWOT) analysis and led strategic planning workshops focused on identifying short- and long-term goals. The resulting Strategic Plan emphasizes seven strategic goals, including diversity, equity, inclusion, and belonging; financial sustainability; housing; economic development; infrastructure; and performance culture. The plan was approved unanimously by City Council in December 2024.

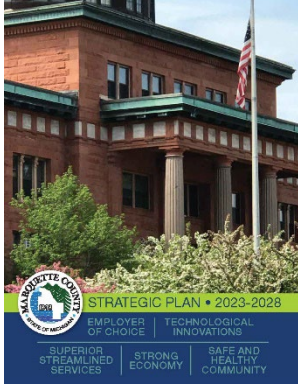


City of Waukesha, Wisconsin

Anthony Brown, City Administrator
262.524.3700 | abrown@waukesha-wi.gov

The strategic plan aimed to provide future policy guidance for community accomplishments, include tangible strategies and objectives that tied to the budget, enable fiscal resources tied to the strategy, and support transparency with the public. BerryDunn applied engagement and facilitation techniques that included: Community Visioning Forums; Social Pinpoint site soliciting community ideas, input, and survey responses; Common Council Strategic Planning Sessions that focused on developing mission, vision, and values; and Staff Strategic

Planning Sessions that focused on developing clear performance measures.



Marquette County, Michigan

Scott Erbisch, County Administrator
906.225.8151 | serbisch@mqtco.org

BerryDunn was selected by Marquette County to develop a five-year strategic plan with an action plan and implementation guidance. This included defining the County's mission, vision, goals, objectives, and activities. Additionally, BerryDunn was contracted to provide strategic planning process facilitation by conducting an environmental scan or SWOT analysis, facilitating meetings with the County, and aligning strategies through guided discussion and consensus building. BerryDunn assisted the County in conducting a survey of employees to determine what improvements are needed to the work environment to help support implementation of the plan and developed recommendations for the County to consider in addressing the employee feedback. The County Board of Commissioners adopted the plan in February 2023.

c.7. Expectations of the City

We develop our work plans based on a proven approach and under the assumption that commitment of City staff will be planned in advance during planning conversations with the City in Phase 1. Below, we summarize what the City can expect in terms of approximate time requirements by City role. We will work collaboratively with the City to effectively plan for staff involvement.

Role	Tasks and Involvement	Apr. Time Commitment
City Project Management Team	<ul style="list-style-type: none"> • Attend initial project planning activities • Attend Biweekly Project Status Meetings • Support the development of: <ul style="list-style-type: none"> ○ Steering Committee charter ○ Stakeholder Engagement Strategy ○ Participant web surveys ○ Community Visioning Plans ○ Social Pinpoint platform ○ Initial strategic planning themes framework ○ Environmental scan and strategic analysis ○ Strategic Plan ○ Implementation Plan ○ Project presentations 	110 hours per team member
Steering Committee	<ul style="list-style-type: none"> • Attend project kickoff presentation • Support environmental scan and Strategic Analysis preparation • Support Strategic Plan development 	40 hours per committee member
City Council	<ul style="list-style-type: none"> • Attend project kickoff presentation • Attend One-on-One Visioning Interviews • Participate in Community Visioning Forums • Adopt Strategic Plan 	20 hours per Councilmember

Role	Tasks and Involvement	Apr. Time Commitment
City Executive Leadership Team	<ul style="list-style-type: none"> • Attend project kickoff presentation • Attend One-on-One Visioning Interviews • Support Strategic Plan development • Develop the Implementation Plan 	60 hours per team member
Key Department Staff	<ul style="list-style-type: none"> • Attend project kickoff presentations • Support Implementation Plan – individual work plans development 	40 hours per staff
Boards, Committees, and Commissions	<ul style="list-style-type: none"> • Attend One-on-One Visioning Interviews • Participate in Community Visioning Forums 	5 hours per Board member

Documents and Data

As mentioned in Task 1.2 in our work plan, we will request and compile documentation and data to help us better understand the current environment and inform engagement activities. These documents may include:

- Key performance metric data
- Program descriptions and data
- Past internal and external assessments
- Past strategic plans and associated materials
- Other existing planning and policy documents, organizational charts, staffing, and operating and capital budget details
- Data from any previous community and stakeholder engagement efforts that are relevant to development of the Final Novi 2050 Strategic Plan
- Previous surveys of the City stakeholders and staff
- Demographic, economic, and community data and forecasted trends from the U.S. Census Bureau, the U.S. Bureau of Labor Statistics, American Community Survey, U.S. Department of Education, Centers for Disease Control and Prevention, the Opportunity Index, and other state and local data sources

We will not ask the City to produce any items that do not exist or are not readily available.

d. Fees and Expenses

As mentioned in Section c5 of our proposal, our proposed fixed-fee services cost to complete the City's desired project is \$136,475. Please refer to Section c5 for a detailed cost breakdown by phase, if desired. Our proposed fixed-fee services cost includes all expenses associated with our proposed work plan with the exception of our estimated travel expense allocation, which is \$16,054; travel will only be billed for actual travel expenses incurred. We will utilize our hybrid methodologies through collaborative planning with the City to limit travel expense to the City as appropriate.

In terms of payment for our services, BerryDunn invoices for progress made toward project deliverables on a monthly basis. As mentioned, our measure of satisfying a deliverable is based on the City's signed acceptance, so the City will not incur any additional costs associated with the process of reaching deliverable acceptance.

e. Scope of Work

Figure 3 presents an overview of our work plan intended to achieve the City’s goals and objectives for this important initiative.

Figure 3: Work Plan Overview



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

BerryDunn brings unmatched value to the City on this project. Our approach offers the following benefits to the City, as well as an efficient and effective approach to help ensure cost efficiency at every step.

- A proven yet flexible approach that has been refined and perfected over 30 years and more than 70 strategic planning processes
- Supportive methodologies that generate consensus, minimize change resistance, increase buy-in, and keep the project on time and on budget
- Thoughtful stakeholder engagement, beginning with early identification of who to involve and how to best engage them and follow through by providing variety in our engagement activities—we meet stakeholders where they are
- Consideration for how to make the plan actionable and encourage collective progress toward the City’s vision even after the project is complete
- A process and a plan that is made for you—we do not believe in a one-size-fits-all approach, and our efforts reflect what needs to happen to help ensure the City’s goals and needs are met and exceeded

Our proposed work plan is described in full detail below and on the following pages. This work plan assumes a 16-month project duration, further detailed in Section c.4, and embeds the benefits described in the points above.

Phase 1: Project Planning and Management

1.1 Prepare for and conduct an initial project planning meeting. Upon conducting background research to gain more familiarity with the City, we will conduct initial project planning with the City Project Management Team (PMT) to identify project milestones and expectations in the strategic planning process. We will

Phase 1: Project Planning and Management

introduce key team members, clarify project goals and objectives, identify known project constraints, discuss steering committee formation, establish expectations and protocols, 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 Novi 2050 Strategic Plan. These discussions will help us to refine our currently proposed Project Work Plan and Schedule.

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

Examples include:

- Key performance metric data
- Program descriptions and data
- Past internal and external assessments
- Past strategic plans and associated materials
- Other existing planning and policy documents, organizational charts, staffing, and operating and capital budget details
- Data from any previous community and stakeholder engagement efforts that are relevant to development of the Final Novi 2050 Strategic Plan
- Previous surveys of the City stakeholders and staff
- Demographic, economic, and community data and forecasted trends from the U.S. Census Bureau, the U.S. Bureau of Labor Statistics, American Community Survey, U.S. Department of Education, Centers for Disease Control and Prevention, the Opportunity Index, and other state and local data sources

1.3 Develop a Project Work Plan and Schedule. Based on the information gathered from our initial project planning meeting, 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 review the drafts and solicit feedback from the City PMT during a Biweekly Project Status Meeting. We will also introduce the City PMT to our document review process and provide an opportunity for the City to share input on a critical step in the process. We will incorporate the City's feedback and finalize the documentation before distributing it in final form.

Deliverable 1 – Project Work Plan and Schedule

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

Deliverable 2 – Biweekly Project Status Meetings

Phase 2: Visioning, Community Engagement, Stakeholder Engagement, and Strategic Analysis

2.1 Draft Steering Committee formation details and associated charter. We will draft Steering Committee formation details, including a listing of who may be most appropriate involve, as well as details on its structure, roles, and responsibilities. We will then prepare a draft Steering Committee charter to document outcomes and clarify the Committee's purpose, members, and functionality. During a Biweekly Project Status Meeting, we will review the draft Steering Committee charter with City PMT before updating to final.

2.2 Develop and deliver a project kickoff presentation. We will develop a project kickoff presentation to support project orientations held for the Steering Committee. The presentation will introduce participants to the BerryDunn team, our approach and methodologies, project goals and objectives, the anticipated timeline, roles and responsibilities of the Committee, and how we intend to involve them and others in the process and the development of the Final Novi 2050 Strategic Plan. We will review communications and the kick-off presentation with the City PMT in a Biweekly Project Status Meeting before finalizing and facilitating the session.

2.3 Develop a Stakeholder Engagement strategy. We will develop a Stakeholder Engagement strategy, first compiling a list of stakeholders and stakeholder groups we should engage in this process and then identifying the best methods to engage them. The strategy will also include developing communications and messaging to build awareness for the process, interview questions and protocols, community engagement formats, and additional project kick-off presentations to be used for orientation meetings with City Council, the City Executive Leadership Team, and key department staff to introduce and prepare them for the strategic planning process. We will review this kickoff presentation with the City PMT during a Biweekly Project Status Meeting before finalizing and presenting.

2.4 Conduct additional project kick-off sessions. We will conduct additional project kickoff sessions with the City Council and City Executive Leadership Team to introduce participants to the strategic planning process and set the stage for activities to come and their involvement in them. These sessions will also help them understand how to prepare the City's departments for the process and how they may be involved.

2.5 Develop and administer an internal survey. We will develop and administer an internal participant web survey to gain perspective on the City's current state and strategic planning readiness and identify potential barriers to successful strategic planning. We will review survey results with the City PMT during a Biweekly Project Status Meeting to identify ways in which we can help the City overcome these barriers and improve overall readiness within the organization for the strategic planning progress the City desires.

2.6 Conduct One-on-One Visioning Interviews. We will conduct One-on-One Visioning Interviews with internal and external stakeholders identified in project planning activities in collaboration with the City to gather the perspectives and input on potential priorities and objectives for the City's future direction. This list will include, but is not limited to, City Council, the City Executive Leadership Team, and Boards and Committees. On-site interviews will be coordinated in conjunction with on-site Community Visioning Forum Campaigns and reviewed with the City PMT during a Biweekly Project Status Meeting.

2.7 Develop the City's Social Pinpoint site. We will use tools and technology that will help to encourage collaboration with the City and its stakeholders. One of these tools, a virtual engagement platform called Social Pinpoint, will be customized to encourage community engagement in the strategic planning process and to gain broad stakeholder input that will be used to inform development of the Final Novi 2050 Strategic Plan. We will work in collaboration with the City to help ensure its landing page is built thoughtfully and speaks to its culture. Additionally, within this landing page, the City stakeholders will have access to an

Phase 2: Visioning, Community Engagement, Stakeholder Engagement, and Strategic Analysis

idea wall and other engagement tools that will help gather information related to the City's current environment and the community's desired vision for the City's future. The Social Pinpoint Site will be reviewed with the City PMT during a Biweekly Project Status Meeting.

2.8 Design, prepare for, and conduct Community Visioning Forums and Community Engagement activities.

We will facilitate up to three Community Visioning Forum Campaigns designed to identify community goals, define the City's vision for the future, and generate ideas from current and former City Councilmembers, Boards and Commissions, and stakeholders identified. We will also design and facilitate up to four Community Engagement events designed to glean the similar outcomes from a diverse group of community constituents. We will analyze the results of these forums and activities to develop an initial strategic planning themes framework, which we will review with the City PMT during a Biweekly Project Status Meeting.

2.9 Synthesize information gathered and develop an environmental scan and Strategic Analysis. We will synthesize information gathered through quantitative and qualitative research, document and data review, Social Pinpoint, stakeholder interviews, and Community Engagement campaigns and events to develop an environmental scan and Strategic Analysis. The format will be a highly visual and compelling slide deck and will be used to inform the upcoming strategic planning sessions in Phase 3. The presentation will provide an overview of the City's current environment; a detailed strengths, weaknesses, opportunities, and challenges (SWOC) and situational analysis; and discovery outcomes. This will be presented to the City PMT to solicit input and gain consensus.

2.10 Collect input and finalize environmental scan and Strategic Analysis. We will review the environmental scan and draft Strategic Analysis with City PMT during a Biweekly Project Status Meeting and update the document according to input. We will then review the environmental scan and Draft Strategic Analysis with the Steering Committee, to gather additional input, as well as answer any questions, to encourage buy-in and finalize the document. As mentioned, the environmental scan and Final Strategic Analysis 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 3 – Visioning, Community Engagement, Stakeholder Engagement, SWOC, and Strategic Analysis

Phase 3: Strategic Planning

3.1 Develop the meeting design and agendas for strategic planning sessions. We will design and develop agendas for strategic planning sessions. Each session's design and agenda will guide strategic planning progress and will include a presentation of the Final Strategic Analysis to provide participants with a shared understanding of the current environment, the trends that are affecting it, opportunities for the future, and key takeaways from engagement activities. Each session will focus on building consensus and refining the strategic priorities identified, as well as the City's mission, vision, core values, guiding principles, strategic priorities, key results, and performance measures. We will review the meeting designs and agendas for each session with the City PMT before updating them to final.

Phase 3: Strategic Planning

3.2 Facilitate strategic plan development session with City Council and Steering Committee, and document results. This session will focus on developing the City's vision, mission, values, strategic priorities, and goals with City Council and the Steering Committee. This session will be guided by the previously developed meeting design and agenda, as well as the Final Strategic Analysis. 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 PMT and plan for next steps.

3.3 Facilitate strategic plan development session with Executive Leadership Team, and document results. This strategic planning session will be conducted with the City's Executive Leadership Team, and it will be guided by the previously developed meeting design and agenda. We will review the Final Strategic Analysis, and review and refine results from the City Council and Steering Committee development session. We will develop objectives for strategic priorities and expected outcomes, provide performance management overview, and develop preliminary performance measures for each expected outcome. We will document outcomes of this session and review with City PMT.

3.4 Finalize objectives and performance measures. With the workshops and outcomes of strategic planning sessions 1 and 2, we will work with the City PMT to finalize objectives and performance measures. The measures will be quantifiable in terms actual progress made toward meeting the objectives and appropriate as it relates to the City's size, operations, management, and systems. We will document outcomes, as well as a process and schedule for progress reporting and performance evaluation to help ensure effective tracking and monitoring.

3.5 Develop an Implementation Plan template and provide guidance to the City PMT. We will develop an Implementation Plan template that will identify resources, partners, department and division leads, anticipated timelines, interdependencies, actions, and other information to help enable the plan implementation and progress reporting process. This template will be customized to the City's needs and will serve as a tool to delegate responsibilities, track progress, and assist in the overall longevity and sustainability of the Final Novi 2050 Strategic Plan. Using the template, we will facilitate the City's PMT on how to input data into the template for action planning, performance tracking, and updating the plan on a regular cadence.

3.6 Develop and present the Initial Novi 2050 Strategic Plan Draft. We will develop the Initial Novi 2050 Strategic Plan Draft in an agreed-upon format for the final document. This plan document will include an executive summary, as well as a detailed plan that identifies the City's shared vision, mission, core values, strategic priorities, goals, objectives, and performance measures. We will review this draft with the City PMT and Steering Committee and prepare a presentation to present the Initial Novi 2050 Strategic Plan Draft to the City Council in a work session. This will serve as an opportunity for the City leadership to provide feedback and make any final changes.

Deliverable 4 – Initial Novi 2050 Strategic Plan Draft

3.7 Develop the Final Novi 2050 Strategic Plan. After reviewing the Initial Novi 2050 Strategic Plan Draft with the City Council, we will incorporate requested edits and develop a graphically designed Final Novi 2050 Strategic Plan for final approval and adoption. In addition to the content described in Task 3.5, the final document will include a description of the strategic plan development process, the plan for progress

Phase 3: Strategic Planning

monitoring and reporting, as well as the development of a one-page "Plan at a Glance" document that can serve as a standalone high-level summary of the Strategic Plan. The "Plan at a Glance" will follow the design and branding of the full Strategic Plan and include mission and vision statements, guiding principles/values, strategic priorities, strategic goals, and a link to the website where the full Final Novi 2050 Strategic Plan can be reviewed or downloaded.

Deliverable 5 – Final Novi 2050 Strategic Plan

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

OPTIONAL – Phase 4: Implementation and Action Planning

4.1 Conduct additional follow-up work sessions to refine objectives and performance measures. We will conduct additional follow-up work sessions with the City's Executive Leadership Team to refine objectives and performance measures identified in the Implementation Plan. This will include establishing a budgetary connection and identifying resources and capital investments to support strategic plan rollout. Activities and actions will be aligned with expected outcomes and defined performance measures, as well as include milestone and target dates, responsible staff, and performance reporting procedures.

4.2 Review and refine the Implementation Plan template. We will review and refine the Implementation Plan template developed in Phase 3 and provide additional guidance to the City to support strategic plan execution. This will involve supporting the City's departmental staff and key team members in developing individual work plans to guide strategic activities and progress at the department and division levels. Department/division work plans will be reviewed with the City's PMT and Executive Leadership Team before updating them to final.

4.3 Develop a recommended cadence for strategic plan updates and a system for monitoring performance measures. We will work collaboratively with the City to develop a cadence for strategic plan updates and a system for monitoring performance measures over the life of the Final Novi 2050 Strategic Plan. We will also develop a performance metrics dashboard for display on the City's website to best support the City's performance metrics monitoring and reporting. Information gathered through this system can be displayed internally or externally on the City's public-facing website. This website will also highlight accomplishments made in the process and promote transparency and trust with the public.

4.4 Develop reporting templates and a process for gathering insights. We will develop an assortment of reporting templates to gather input from the City's Executive Leadership Team and key departmental staff, such as quarterly and annual reporting templates, so that progress can be monitored efficiently, effectively, and methodically. The templates will be supported by a clear process for insights to be contributed consistently. We will also work with key departmental staff to create periodic progress reports to City Council.

Deliverable 6 – Implementation and Action Plan

f. Additional Data

We do not have any additional information to provide at this time.

Appendix A. Resumes

Seth Hedstrom, PMP®, LSSGB

PRINCIPAL / PROJECT PRINCIPAL

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

BS, Business Management,
Babson College

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

Lean Six Sigma Green Belt
Certified

Diversity and Inclusion
Certificate, Cornell
University

AFFILIATIONS AND MEMBERSHIPS

- Associate Member,
Government Finance
Officers Association

SELECT CLIENTS

City of Bloomington, MN

City of Edina, MN

City of St. Charles, IL

City of Waukesha, WI

City of Wausau, WI

DuPage County, IL

Lake County, IL

Marquette County, MI

Ottawa County, MI

Saginaw County, MI

Village of Oak Park, IL

Seth is a principal and leads BerryDunn's Local Government Practice Group. He has more than 15 years of experience assisting public-sector clients. His experience includes technology planning, organizational needs assessments, system planning and procurement, and the implementation of enterprise-wide information systems. Seth often serves in a leadership role on strategic planning projects and manages and oversees project progress and issue escalation and resolution with executive project sponsors.

RELEVANT EXPERIENCE

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

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

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

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

Governance and Strategic Decision-Making: Seth has led our clients through many of the complex decision points and issue-resolution processes typical of business process analysis and system assessment and selection projects. He helps clients establish decision-making structures that will guide them as they make decisions based on analysis while also building consensus.



Jen Ferguson, MPA

SENIOR CONSULTANT / PROJECT MANAGER

Berry, Dunn, McNeil & Parker, LLC

EDUCATION AND CERTIFICATIONS

MPA, Evans School of Public Policy and Governance, University of Washington

BS, Business Management, Stritch University

Senior Executive Institute, University of Virginia

Institute of Cultural Affairs (ICA) Technology of Participation® (ToP®) Certified

AFFILIATIONS AND MEMBERSHIPS

- Government Finance Officers Association (GFOA)
- International City/County Management Association (ICMA)

SELECT CLIENTS

Bloomfield Township, MI
City of Foley, AL
City of Janesville, WI
City of Waukesha, WI
Mesa County, CO
St. Johns County, FL

Jen is a senior consultant in our Local Government Practice Group. She has over 25 years of public-sector experience and significant expertise in strategic and financial planning. Jen has led, planned, and coordinated fiscal affairs for cities across Washington and Minnesota, holding influential leadership positions such as city administrator, director of finance, and executive director for an Economic Development Authority. Supplementing her background in public-sector administration, Jen is well versed in, organizational development, performance management, operations and process improvement, economic and business development, and enterprise resource planning implementations.

RELEVANT EXPERIENCE

Local Government: Extensive, hands-on experience in the public sector has given Jen in-depth knowledge of city operations, including staffing, facility, and fleet management. She has a demonstrated history of directing resources to ensure optimum service delivery and support the economic vitality of local business.

Financial Management and Planning: Jen's experience leading fiscal affairs includes budget development and administration, long-term financial planning, accounting, audit, payroll, investment management, debt management, and billing and collections. As director of business development and finance for the City of Waconia, Minnesota, Jen prepared and maintained a 20-year financial management plan, with an integrated 10-year capital improvement plan to support long-term objectives.

Organizational Development: Jen specializes in development and planning at both the departmental and city level, guiding operations to achieve long-range strategic goals. She has both facilitated and consulted on organizational assessments, economic development programs, as well as projects focused on process improvement. Jen has additional leadership experience in human resources programs, including personnel retention, and performance management.

Information Technology and Systems Management: Throughout various roles, Jen has worked to integrate technology to optimize organizational processes. She led the implementation of a city-wide enterprise software project and continually developed information services providing e-government services delivery. Her experience includes overseeing information services departments and advising organizations on ERP software implementation.

Charline Petit Homme, MPA, Prosci® CCP, CAPM

MANAGER / FACILITATOR

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

MPA, Clark University

BA, Political Science, Clark
University

Prosci® Certified Change
Practitioner (CCP)

Certified Associate in Project
Management® (CAPM®)

Institute of Cultural Affairs
(ICA) Technology of
Participation® (ToP®),
Certified

SELECT CLIENTS

City-County Information
Technology Commission, WI

City of Cedar Falls, IA

City of Cleveland, OH

City of Lawrence, KS

City of Wausau, WI

Hamilton County, IN

City of Peoria, IL

City of Wausau, WI

Marquette County, MI

Charline is a manager in our Local Government Practice Group and is particularly skilled in leading clients through complex transformational initiatives, including strategic planning projects. She is a strong facilitator and is certified in the ICA ToP® facilitation methodology. Her experience also includes organizing and leading groups through the adoption of new ideas and concepts, and promoting buy-in. She brings in-depth knowledge and involvement with strategic planning, change management, and relationship building through her strong communication, leadership, and project management skills. She is especially skilled at facilitating stakeholder engagement efforts and synthesizing outcomes to optimize results for her clients. Prior to joining BerryDunn, Charline spent multiple years serving the public-sector, supporting and conducting field research, data collection, organizational reporting, gap analysis, and recommendations development.

RELEVANT EXPERIENCE

Strategic Planning: Charline regularly leads and facilitates strategic planning efforts with BerryDunn's municipal and county government clients. She leverages her ICA ToP® certification to help groups achieve consensus even when there are competing priorities and challenging constraints. She utilizes her project management training to keep large strategic planning efforts on schedule and on budget. She has served as project manager on recent or ongoing strategic planning initiatives, including those for the Attleboro Redevelopment Authority and the Towns of Chelmsford and Holliston, Massachusetts.

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.

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.

Organizational Change Management: Charline helps her clients embrace change and preparing for a future environment through effective communication. Charline has assisted clients in developing timely and consistent communication to promote buy-in and project success.



Keith Linton, PMP®, ITIL (F)

SENIOR CONSULTANT / FACILITATOR

Berry, Dunn, McNeil & Parker, LLC

EDUCATION AND CERTIFICATIONS

BS, Engineering, Lawrence Technical University

Certified Project Management Professional® (PMP®)

ITIL Foundations, Information Technology Infrastructure Library

AFFILIATIONS AND MEMBERSHIPS

- Project Management Institute®, Member

SELECT CLIENTS

Bloomfield Township, MI

City of Shreveport, LA

Caddo Parish, LA

Caddo Parish Sheriff's Office, LA

East Baton Rouge Parish, LA
– Brec-Recreation and Park Commission

Madison County, AL

Santa Rosa Sheriff's Office, FL

Town of Front Royal, VA

Keith Linton is a senior consultant in our Local Government Consulting Practice Area. He has 16 years of relevant experience, including project management. He has worked closely with stakeholders to assist with cost savings, negotiations, fostering relationships, developing KPIs, maximizing resources, and providing sustainable solutions.

PROJECT EXPERIENCE

Strategic Planning: Having been involved in the planning of significant strategic projects, Keith has led numerous requirements gathering efforts to collect stakeholder needs, goals, and objectives to incorporate into executable plans. Keith was recently part of the BerryDunn team assisting Bloomfield Township, MI with their Strategic Plan development. As a member of several Executive Steering Committee Teams while managing client projects, Keith is responsible for communicating project information to stakeholders at all organizational levels.

Stakeholder Engagement: Keith understands the important role of stakeholders in any project and brings significant experience leading stakeholder negotiations. He focuses on managing stakeholder expectations by fostering internal and external business relationships. His past successes include developing KPIs and reporting structures for daily executive reviews in order to determine resource allocation and offer sustainable solutions for his clients.

Project Management: Keith excels at maintaining a focus on the big picture vision while managing details to meet organizational goals and objectives. He specializes in addressing complex issues by providing resolutions in a fair, concise, and transparent manner. He has identified and quantified trending issues to keep projects on track, and conducted reviews to support project management functions, reduce the number of formal reviews, and provide significant cost savings.

Maddison Powers Spencer, MPA

SENIOR CONSULTANT / FACILITATOR

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

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

BS, Political Science,
Northern Arizona University

Institute of Cultural Affairs
(ICA) Technology of
Participation® (ToP®)
Certified

SELECT CLIENTS

City of Janesville, WI

City of Peoria, IL

City of St. Charles, IL

City of Waukesha, WI

City of Wausau, WI

DuPage County, IL

Lake County, IL

Marquette County, MI

Township of Bloomfield, MI

Village of Schaumburg, IL

Washington County, MN

Maddison is a senior consultant in our Local Government Practice Group. She leverages her firsthand public-sector experience as an assistant to the city manager to support clients and drive successful projects. Certified in the ICA ToP® facilitation methodology, she is adept at leading community and employee engagement efforts and synthesizing outcomes to enhance client results. Maddison's strong communication, leadership, and project management skills complement her ability to conduct current environment assessments, analyze data, and organize and facilitate groups. She has assisted with the development of over 30 local government strategic plans.

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, Maddison served as a senior fellow through the International City/County Management Association (ICMA) fellowship. In this role she managed the recruitment and hiring for two assistant city managers, led a leadership development initiative to develop more women leaders in the organization, and managed an annexation study to understand the impact of service delivery for various city groups.

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.

Facilitation and Engagement: Maddison is skilled in developing stakeholder and community engagement messaging for residents, businesses, key groups, leadership, and governing bodies. Collaborating on communications strategies, she helps ensure clear and consistent messaging reach a broad range of people. Her experience as a facilitator and program manager supports her coordination of logistics for various community engagement activities, such as interviews, focus groups, roundtables, and community events. Maddison's focus on creating a multifaceted outreach strategy promotes inclusive participation throughout the strategic planning process.



Bailey Dickinson, MPA

CONSULTANT / RESEARCH ANALYST

Berry, Dunn, McNeil & Parker, LLC

EDUCATION AND CERTIFICATIONS

MPA, University of Georgia

BA, Political Science,
University of Georgia

BA, Communication Studies,
University of Georgia

Public Affairs Professional
Certificate, Applied Politics,
University of Georgia

Certified Public Manager,
Carl Vinson Institute of
Government

Grant Writing Certificate,
Georgia Center for
Continuing Education

AFFILIATIONS AND MEMBERSHIPS

- Georgia City / County
Management Association,
Scholarship Committee

SELECT CLIENTS

Housing Authority of Erie
County, PA

City of Blue Springs, MO

City of Margate, FL

Onslow County, NC

Bailey Dickinson is a consultant in our Local Government Practice Group. His wide-ranging experience in the public sector has given him broad exposure to aspects of local government administration, including strategic planning, research, and grants management. As special projects coordinator for the City of Covington, Georgia, he led award-winning community projects and managed strategic planning across departments. Skilled in research and program development, he has overseen research initiatives, supported policy analysis, and contributed to government training curricula over the course of his career.

PROJECT EXPERIENCE

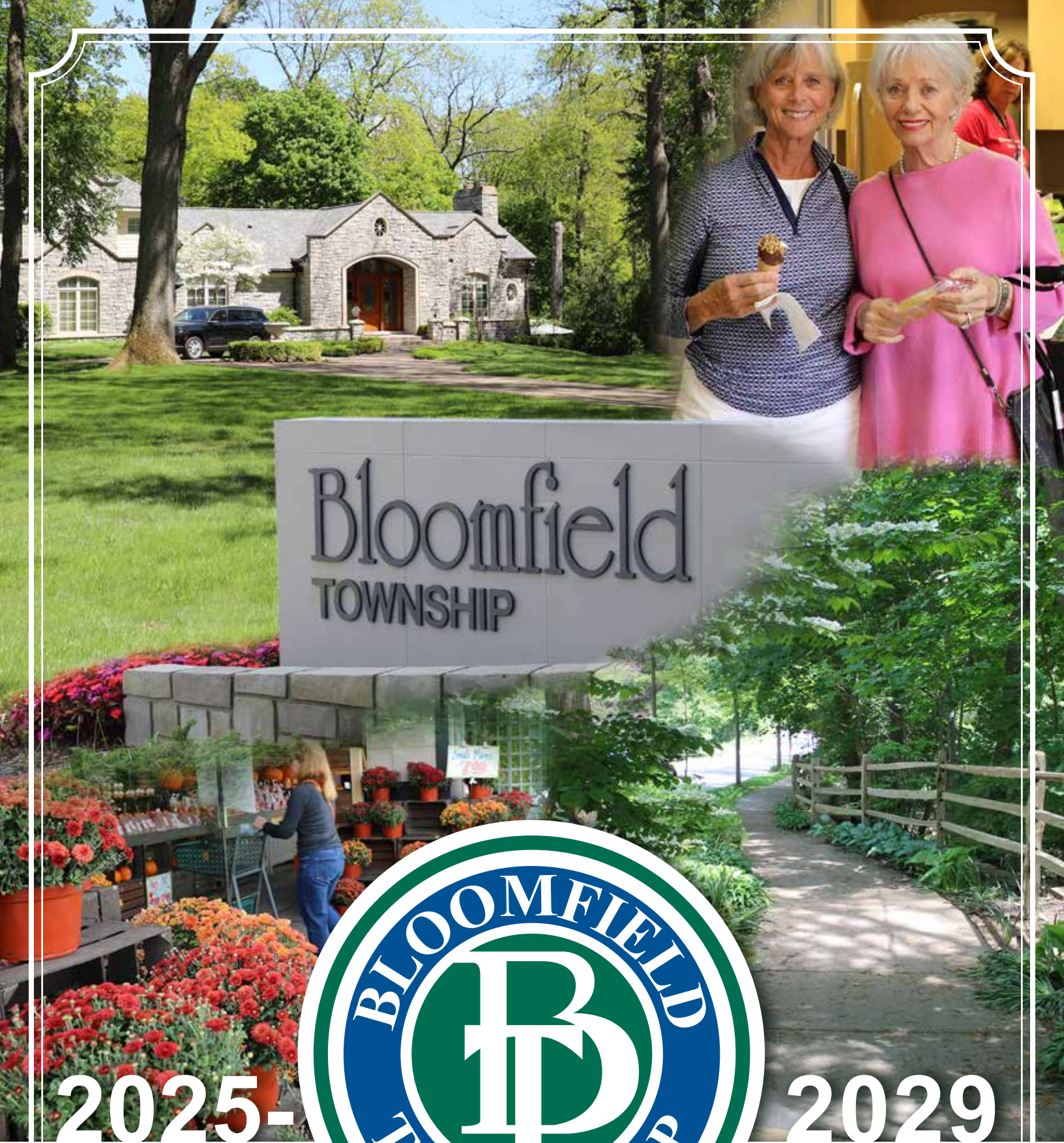
Local Government: Bailey served as both the special projects coordinator and assistant to the city manager during his time with the City of Covington, Georgia. He led Covington's two winning applications for the Georgia Municipal Association's (GMA's) Visionary City Award—awarded for excellence in community engagement. His experience as a graduate research assistant with Carl Vinson Institute of Government exposed him to multiple facets of local government, where helped digitize training programs for associations such as the County Commissioners of Georgia and the Georgia City and County Management Conferences.

Strategic Planning: As Covington's special projects coordinator, Bailey managed the City's strategic planning initiatives in partnership with the GMA, aligning departmental objectives and community goals. His responsibilities included facilitating public engagement initiative groups, researching municipal management best practices, writing organizational policies, and developing long-term departmental strategic plans.

Research and Analysis: While at the Carl Vinson Institute of Government, Bailey oversaw undergraduate research initiatives, maintained communication with legislative offices, and tracked research progress. He further honed his analytical abilities as a legislative fellow for a former U.S. senator, where he conducted policy research on issues related to economic development, agriculture, transportation, and energy, contributing to informed decision-making.



Appendix B. Strategic Plan Work Samples



2025-

2029



STRATEGIC PLAN

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Dear Bloomfield Township Community,

Bloomfield Township continues to be a premiere destination where people want to be — to live, visit, or operate a business. Our continued growth and success will come from embracing the strengths of our community and engaging in purposeful planning.

Over the last year, your Township government has been immersed in the strategic planning process to set the vision for the next five years. The Township engaged BerryDunn, a recognized leader in public sector strategic planning, as our consultants. Together with the Township's Strategic Planning Committee, BerryDunn reached out to the community through stakeholder panel interviews, public forums, an interactive website with collaborative idea wall, as well as both an open response survey and a professionally administered, statistically relevant survey. We received participation and feedback from approximately 3,000 residents, business owners, community leaders, and other stakeholders, along with Township staff and Board Members. Many common themes and goals arose from these community outreach initiatives which formed the basis of our planning. After months of internal analysis and deliberation, the project culminated with the Board of Trustees voting on October 28, 2024, to adopt the attached Bloomfield Township 2025-2029 Strategic Plan.

We are proud to present the Bloomfield Township Strategic Plan for 2025-2029, a blueprint for our community's future. It outlines our vision, sets clear priorities, and defines the actions that will help us achieve them. As we move along this path, it is essential to have a framework that ensures we remain focused on serving you effectively. This is the purpose of the Bloomfield Township Strategic Plan: to act as a compass to ensure we uphold our commitments and maintain accountability.

The Strategic Planning Committee extends our heartfelt thanks to everyone who contributed their insights, making this a truly comprehensive process. We believe our new Strategic Plan is a dynamic, evolving guide that provides clear direction while maintaining the flexibility needed to adapt to our Township's needs in a responsive and responsible manner. We are excited to put this plan into motion, driving growth, prosperity, and improving the quality of life for all in Bloomfield Township.

Respectfully Submitted,

The Strategic Planning Committee



Dani Walsh



Michael Schostak



Amy McKaig



Susan Bowlin



Patti Voelker

Introduction



The Township's strategic plan is a living document that creates a framework and the steps needed to meet and exceed our community's needs over the next several years. The process for completing the strategic plan was overseen by a Strategic Planning Committee, and the content of the plan was determined through broad input from the Bloomfield Township community, Board of Trustees, department leaders, and staff. The plan will be implemented by department staff with guidance and direction from the Township Board. The Board will receive regular reports from staff on their progress implementing the plan and the Board will report progress to the Township community so residents, businesses and stakeholder organizations can track the Township's performance and understand the impact of the strategic goals and objectives in their daily lives.

Regular meetings of the Board of Trustees are typically held the second and fourth Monday of each month at 7:00 P.M. in the Town Hall Auditorium, 4200 Telegraph Rd, Bloomfield Township, MI, 48302.



Dani Walsh, Supervisor
Michael Schostak, Treasurer
Martin Brook, Clerk
Neal Barnett, Trustee
Stephanie Fakih, Trustee
Christopher Kolinski, Trustee
Valerie Murray, Trustee



MARTIN BROOK
CLERK

DANI WALSH
SUPERVISOR

MICHAEL SCHOSTAK
TREASURER

Who We Are



Our Mission



Bloomfield Township delivers best-in-class services in a fiscally responsible manner, fostering a premiere community where all can thrive, while protecting our natural resources.

Our Vision



Bloomfield Township is a safe, inviting, and vibrant community where residents' quality of life is enhanced with outdoor recreation opportunities, well-maintained infrastructure and natural spaces, leading-edge technology, and an exemplary Township government.

Values



Stewardship

We are committed to careful management of public funds and resources to ensure long-term financial viability.

Excellence

We strive for best-in-class service and continuous improvement through visionary leadership that places the needs of the community first.

Integrity

We uphold honesty and transparency in all our interactions by fostering trust and respect within our organization and throughout the community.

Innovation

We embrace forward-thinking, aspirational solutions and positive change to continually enhance our services and community impact.

Collaboration

We work together with approachability and friendliness to build strong partnerships and effectively address community needs.

Strategic Priorities



Why a Strategic Plan?



What does it do?



We know our community has big dreams for Bloomfield Township and want to see them come true. Our strategic plan charts a course for the future that identifies the results we want to achieve.

The strategic plan defines a shared vision for the future and focuses the Township's resources on five clearly defined priorities – *Vibrant Lifestyle*, *Welcoming Community*, *Enhance Community Character*, *Reliable Infrastructure*, and *Best-in-Class Government* – along with goals, objectives, and clear measures for tracking progress and accountability.

At its core, the strategic plan maximizes our chances of realizing the Township's vision by balancing the short-term, immediate reality with long-term goals that help us prepare for and navigate a changing environment. It provides a "*north star*" direction that keeps us on track and working together to keep our commitment to the Township's mission and reach our desired destination.



Vibrant Lifestyle

Our Goal...

Support outdoor recreational and cultural activities for all ages and abilities while encouraging a thriving retail and hospitality presence.

Objectives

- A. Explore opportunities that will enhance and promote community and cultural events by partnering with other cities, villages, townships (CVTs), and community organizations to develop or expand programming to the community.
- B. Build relationships with the local restaurant and business communities to foster business start-up, retention, and expansion that creates a bustling restaurant scene.
- C. Develop a recreational strategy that is fiscally sustainable to offer green space settings, park amenities, outdoor activities, performance space, and recreational programs for all ages.
- D. Develop an action plan to create outdoor spaces for more recreational opportunities.
- E. Create a Vibrant Lifestyle community board to collaborate and support community events.

Outcomes

- Board of Trustees approval of an actionable plan to develop new parks and recreation opportunities.
- The Township is more bike-friendly.
- Community events are created and supported by the Township in partnership with other organizations.
- The Township has the information it needs to seek funding for the creation of parks and green spaces.



Performance Measures

- Create a list of potential partners with community, recreation, and gathering spaces by June 2025.
- Number of Township initiated events.
- Number of ribbon cuttings.
- Develop one community event at Bowers Farm by December 2026.
- Engage in one co-sponsored community event with CVTs by December 2026.
- Cost of community events in comparison to attendance.
- Maintain/increase resident satisfaction with community engagement (measured by annual community survey).
- Complete an inventory of potential green spaces and conduct a feasibility study of their viability within 18 months of inventory completion.
- Maintain/increase resident satisfaction with the recreational opportunities in the Township measured by a community survey within three years.
- Percentage increase in funding available for parks and green spaces.
- Increased participation in recreational programs and opportunities (measured through program registration and counting program attendance with a clicker).
- Complete a needs analysis for multi-use space.



Welcoming Community

Our Goal...

Build and enhance avenues of communication among residents, the Township, businesses, and other stakeholders in support of a safe, vibrant, and welcoming community.

Objectives

- A. Recreate an ambassador program to welcome new residents and introduce them to Township services, amenities, and attractions.
- B. Explore and develop partnerships to expand and promote community events that appeal to a broad range of interests.
- C. Produce a calendar of events to be distributed throughout the Township so residents are aware of activities and opportunities for enjoying life in their community.
- D. Develop a brand identity for Bloomfield Township that highlights its unique characteristics and differentiates the community from surrounding towns and cities.
- E. Promote the brand identity with specific messaging focused on safety, diversity, and the Township's natural beauty through all available channels.



Welcoming Community



Outcomes

- Residents feel welcomed and knowledgeable about Township services, amenities, and businesses.
- The Township has a distinct and recognizable identity.

Performance Measures

- Number of people attending events.
- Number of events per year.
- Maintain/increase resident satisfaction with Township communication and community engagement efforts (measured by annual or biennial community survey).
- Number of welcome packets delivered.
- Increase in community participation in available communication channels and activities measured year-over-year.
 - Website clicks
 - Newsletter participation
 - Social media platforms
 - Podcast meetings



Enhance Community Character

Our Goal...

Preserve the Township's history and natural resources to maintain our unique community character and neighborhood design elements for current and future residents.

Objectives

- A. Create a multimedia campaign to inform Township residents about code enforcement and building code resources to ensure the safety of residents and assist them with enhancing and improving their properties.
- B. Encourage use of safety paths by informing the community through multi-faceted channels to ensure a sense of safe and connected neighborhoods.
- C. Revisit the Township's tree preservation and protection policies and amend current zoning ordinances to further define levels of required preservation and enforcement so that green spaces and tranquil settings are maintained.
- D. Collaborate with HOAs to inform residents about Township residential lot regulations and to protect and maintain wetland areas.
- E. Engage with Preservation Bloomfield, Bloomfield Historical Society, and the Bloomfield Hills School District to promote their educational opportunities regarding the Township's rich history.
- F. Update the Township's master plan to allow the evolution of the Township in a way that is consistent with community character and neighborhood designs.



Enhance Community Character



Outcomes

- Trees and greenspaces that provide a tranquil setting are preserved.
- Large lots and density requirements are protected.
- The Township Master Plan is updated by December 2027.

Performance Measures

- Number of enforcement actions, wetland violations, and HOA lot splits.
- Reduction in number of zoning and building violations.
- Number of informational campaigns that were developed and attended.
- Number of tree preservation applications.



Reliable Infrastructure

Our Goal...

Continue to invest in reliable and modern infrastructure and systems that meet the Township's expected levels of service, while evolving with the changing needs and potential growth of the community.

Objectives

- A. Invest in technology to analyze, improve, and provide resilient infrastructure that meets needed service levels of the community.
- B. Continue the execution of the Township's Capital Improvement Program through proactive and solid fiscal planning, while including options for clean technologies where possible.
- C. Continue to advocate for more improvements in the utility providers electric, internet and cellular communications infrastructure.



Reliable Infrastructure



Outcomes

- The Township public safety facilities are updated/renovated.
- The Township's Capital Improvement program is funded and implemented through the Five-Year Asset Management Plan.
- Infrastructure solutions and needs are met through partnerships.

Performance Measures

- Number of Capital Improvement projects completed.
- Maintain/increase resident satisfaction with public utilities by hosting an annual Town Hall with utility providers.
- Completed comprehensive, organization-wide technology assessment to identify needs of the Township by April 2028.
- Number of cellular tower applications received.



Best-in-Class Government

Our Goal...

Deliver best-in-class government services to the community by developing and maintaining an exemplary workforce, while continuing to be an innovative leader in local government.

Objectives

- A. Establish an employee retention plan that includes competitive total compensation, professional development and training plans focused on leadership, emotional intelligence, and employee wellness to maintain a positive and thriving workforce culture.
- B. Establish an employee recruitment plan that streamlines the hiring process and develops a talent pipeline to attract top talent and be a sought-after employer of choice.
- C. Create community outreach programs and partnerships with community stakeholders to develop a talent pipeline to attract top talent and to become a sought-after employer of choice.
- D. Continue our strong and efficient financial management practices that prioritize the use of all resources to maintain high levels of service to the community.
- E. Maintain involvement with community stakeholders, community outreach programs, and professional organizations to continue to learn and develop resources and best practice policies.



Best-in-Class Government



Outcomes

- Maintain regional leader status in public service delivery.
- Partnerships are developed with other service providers and the community participates and is informed.
- A Human Resources and Performance Management Program is established.

Performance Measures

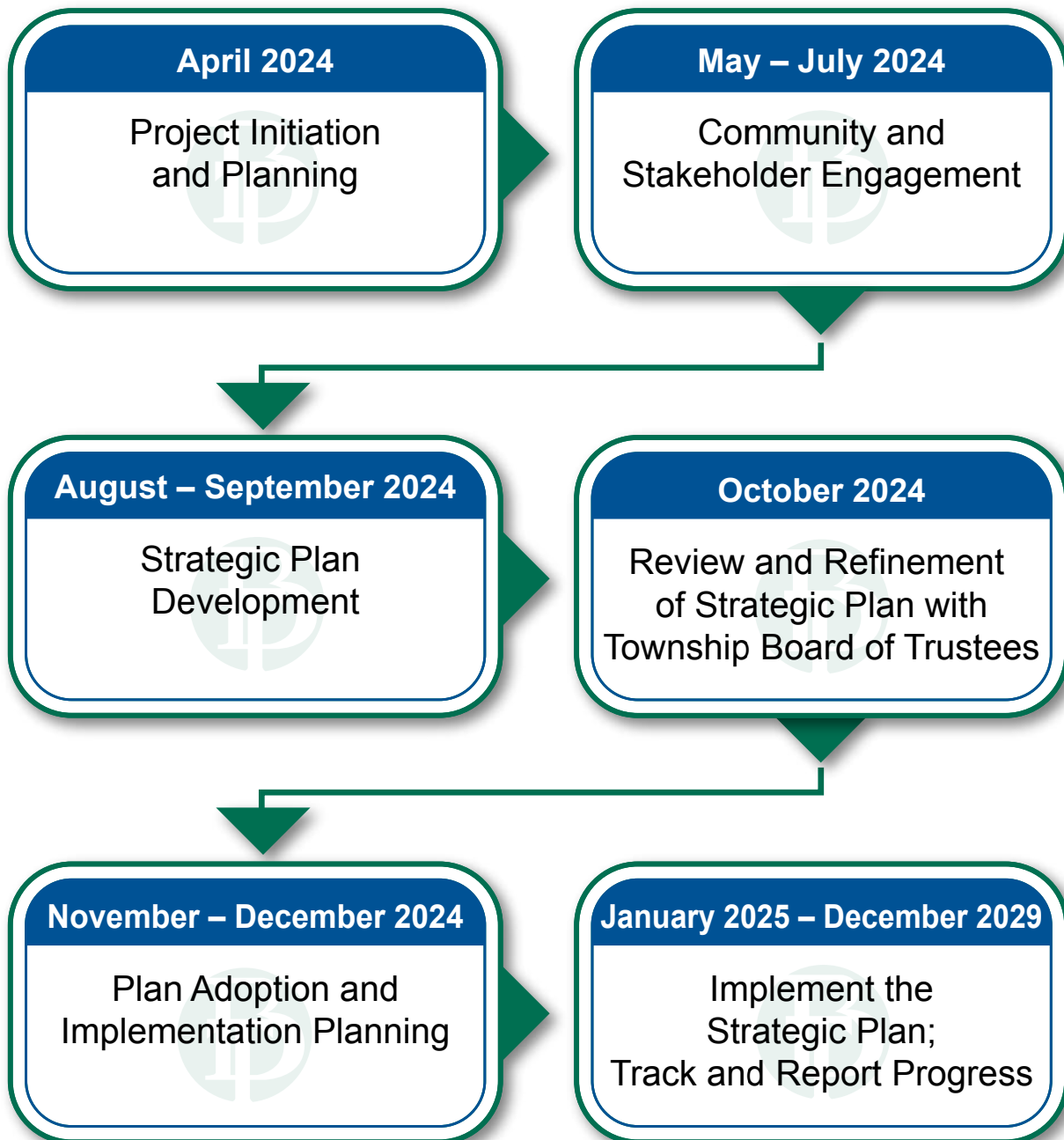
- Increase in grant funding.
- Reduction in staff vacancy rate.
- Number of training hours completed annually.
- Number of Employee Assistance Program (EAP) contacts.
- Change in rate of staff turnover.
- Percentage increase in employee satisfaction with total compensation (measured by annual employee engagement survey).
- Maintain/increase employee engagement (measured through an employee engagement survey annually).
- Maintain/increase resident satisfaction with the quality and value of Township services (measured by annual or biennial community survey).



How Did We Arrive at this Plan?



The strategic planning process is as important as the final document itself. Input was incorporated from across the community and the Township organization, including the Township Board, employees, leadership, residents, businesses, educators, youth, seniors, community-based organizations, and other community stakeholders. This helps ensure that we are being responsive to community priorities and needs and that Township resources are aligned with those needs as well as with the government's organizational needs.



What's Next?



We understand our community's high standards and aspirations. Our shared goal is to maintain the high quality of life we enjoy today and ensure Bloomfield remains an exceptional place to live. The Strategic Plan's five-year timeline allows us to thoughtfully sequence initiatives that support this goal.

With the Strategic Plan in place, we're developing an implementation framework that translates our priorities, goals, and objectives into actionable steps, with clear responsibilities and timelines. This approach fosters collaboration among Township departments as we work toward our desired future. Regular monitoring and evaluation systems will support continuous improvement and ensure alignment with the Township's vision and strategic priorities.

We are committed to focusing resources on the priorities that best serve our community, aligning the Strategic Plan with the Township's annual budget process to ensure efficient resource use and support for our key goals. As needs and opportunities shift over the plan's lifetime, we'll address necessary adjustments as part of our budget review. Guided by the Strategic Plan, other Township initiatives will also align, keeping all efforts moving in a common direction. The values expressed in this plan will shape decision-making, service delivery, and the daily work of Township employees.

Keeping Track of Progress

The Township will monitor progress toward strategic plan goals and objectives and report on performance measures. Tracking keeps us transparent and holds us accountable.

We will provide the community with an annual report and year-end presentation to the Board of Trustees. Community members can expect to understand what we are working on and the benefits that will result for our residents, businesses, and the community overall.

Monthly –

Township staff will discuss and evaluate progress on strategic goals and objectives.

Quarterly –

Township leadership will provide the Township Supervisor with progress updates for each strategic plan priority.

Twice a Year –

The Township Supervisor will prepare an update to the Board for each strategic priority, including progress updates, successes, wins, and challenges.

Annually –

The Township Supervisor will prepare a year-end update detailing progress on each strategic priority, goal, and objective. The report will be presented to the Board of Trustees and shared with the community on the Township's website bloomfieldtwp.org

Engagement Summary



2,243

Online Interactions with Social Pinpoint
Virtual Engagement Platform



162

Ideas Wall
Comments



110

Attendance at 3
Community Forums



80

Interviews and
Focus Group Participation



424

Statistically Valid Community
Survey Responses



4

Plan Development
Workshops

Statistical Validity indicates how much one can rely on the conclusion derived from a survey sample. The combinations of proper sampling methods, adequate sample sizes, and unbiased data collection improve the reliability of survey results. To achieve a level of confidence of the survey results, the goal for the random sample was to reach 400 completed surveys from residents of Bloomfield Township. The 424 responses ensures that the survey results are statistically significant based on the population so that the results of the survey have a 95% level of confidence within +/- 3.57%.

Acknowledgements



This strategic plan results from the combined efforts of our Township's elected officials, employees, and community members. Bloomfield Township would like to extend sincere thanks to everyone who saw the importance of this plan and dedicated their knowledge, guidance, and time over the past several months to bring it to life. Your contributions are the bricks that build the foundation for our future.



Strategic Planning Committee

Dani Walsh, *Township Supervisor*
Michael Schostak, *Township Treasurer*
Patti Voelker, *Director of Planning, Building and Ordinance*
Amy McKaig, *Digital Content Coordinator*
Susan Bowlin, *Administrative Assistant to the Township Supervisor*



Work Session Committee

Corey Almas, *Director of Engineering and Environmental Services*
Wil Babinchak, *Director of Information Technology*
James Gallagher, *Police Chief*
Mary Jevahirian, *Deputy Treasurer*
Darrin Kraatz, *Director of Assessing*
John LeRoy, *Fire Chief*
Carrie LeZotte, *Director of Cable and Community Relations*
Noah Mehalski, *Director of Department of Public Works*
Deana Mondock, *Deputy Clerk*
Jason Theis, *Director of Accounting*
Christine Tvaroha, *Director of Senior Services*
Patti Voelker, *Director Planning, Building and Ordinance*



Stakeholder Panelists

Imam Shaykh Abdullah Al-Mahmudi, *Muslim Unity Center*
Lynn Alexander, *Senior Advocate for Oakland County*
Corey Almas, *Engineering and Environmental Services Department Director*
Wil Babinchak, *Information Technology Department Director*
Duane Barbat, *Barbat Organization President*
Neal Barnett, *Bloomfield Township Trustee*
Joe Bauman, *Birmingham Bloomfield Chamber of Commerce President*
Matt Beatty, *Bloomfield Christian School Head of School*
Derk Beckerleg, *Secrest, Wardle, et al. Bloomfield Township Attorney*
Scott Bednas, *Boy Scouts of America Troop 1022 Scoutmaster*
Dean Begley, *Township DPW Foreman & Supervisor Union President*
Jason Beidelman, *Penske Corporation Vice President Manufacturer Relations*

Acknowledgements



Stakeholder Panelists Continued

Jeffrey Bellefleur, *The Rotary Club of Bloomfield Board Secretary*
Jim Bellinson, *Riverstone Growth Partners, Mex, and Beau's Grillery Owner*
Martin Brook, *Bloomfield Township Clerk*
Pam Carmichael, *Bloomfield Historical Society and Preservation Bloomfield Board Member*
James Clark, *Robertson Brothers Chief Executive Officer*
John Clark, *Giarmarco, Mullins, Horton PC, Township Labor Attorney*
Vincent D'Angelo, *D'Angelo Brothers Incorporated Owner*
Michael J. Dul, *Michael J. Dul and Associates Owner and Preservation Bloomfield President*
Jason Dungjen, *Detroit Skate Club Director and Coach*
Patrick Dunn, *48th District Court Administrator*
Rana Emmons, *Township Financial Sustainability Commission Board Member*
Stephanie Fakih, *Bloomfield Township Trustee*
Natalie Finerty, *Bloomfield Youth Association Board Member*
Katie Fotherby, *Township General Employee Labor Council Union President*
James Gallagher, *Police Department Chief*
Yuliya Gaydayenko, *Jewish Family Services Chief Program Officer of Older Adult Services*
Dani Gillman, *Bloomfield Township Library Board President*
Jocelyn Giangrande, *Township Zoning Board of Appeals Vice Chair*
Ned Greenberg, *Island Lake Board Riparian*
Tom Haji, *Chaldean Chamber of Commerce and Chaldean Cultural Center*
Paulina Hakopian, *Bloomfield Hills School District PTOC President*
Brian Henry, *Zoning Board of Appeals Chair*
Carlos Hesano, *DRYmedic Restoration President & Wabeek Country Club Owner*
Robert Higgins, *Schwartz and Company Investment Advisors*
Geoff Hockman, *Bloomfield Sports Shop Owner & Bloomfield Village Fire Department Chief*
Alan Jaros, *Bowers School Farm Director & E.L. Johnson Nature Center Director*
Shanna Johnson, *Henry Ford West Bloomfield Hospital President*
Scott Jorgensen, *Foxcroft Home Owners Association Board Member*
Jerry Keller, *Department of Public Works Union President*
Christopher Kolinski, *Bloomfield Township Trustee*
Darrin Kraatz, *Assessing Department Director*
Angel Lau, *Friends of Bowers Farm Board President*
John LeRoy, *Fire Department Chief*
Carrie LeZotte, *Cable and Community Relations Department Director*
Gordon Light II, *American Quality Cleaning Owner*
Carol Mastroianni, *Birmingham Bloomfield Community Coalition Executive Director*
Steve Mazur, *Bloomfield Tennis Club and Fitness Owner*
Keith McDonald, *Bloomfield Hills School District Superintendent of Human Resources*
Joe McGrail, *Township Fire Union President*
Tim McGrane, *M1 Concourse Chief Executive Officer*

Acknowledgements



Stakeholder Panelists Continued

Noah Mehalski, *Department of Public Works Director & Director and Deputy Union President*
Tera Moon, *Bloomfield Township Library Director*
Valerie Murray, *Bloomfield Township Trustee*
Ed Okuniewski, *Brother Rice High School Principal*
Chris Pero, *Max Broock Realtors Real Estate Agent*
Rishiv Ramesh, *International Academy High School Student*
Tom Riney, *Township Police Union President*
Dr. Embekka Roberson, *Superintendent of Birmingham Public School District*
Laura Rubin, *Meadow Lake Board Riparian*
Jeremy Salomon, *International Academy High School Student*
Jeff Salz, *Planning Commission Chair*
Jay Sawmiller, *HUB International*
Pastor Niklaus Schillack, *Beautiful Savior Lutheran Church*
Michael Schostak, *Bloomfield Township Treasurer*
Addy Shattuck, *Pet Supplies Plus Bloomfield Owner*
Shane Spradlin, *Penske Corporation Executive Vice President & General Counsel*
Effie Steele, *Forest Lake Board Riparian*
Karyn Stickel, *Hubbell Roth and Clark Senior Associate*
Bob Taylor, *Township Board of Review Member*
Jason Theis, *Accounting Department Director*
Christine Tvaroha, *Senior Services Department Director*
Rebecca Van Loon, *Brooklyn Bagel Deli Owner*
Patti Voelker, *Planning, Building and Ordinance Department Director*
Dani Walsh, *Bloomfield Township Supervisor*
Dale Watchowski, *President & CEO of Redico and American House*
Erin Watson, *Friends of Johnson Nature Center Board President*
Cathy Weissenborn, *Bloomfield Village Manager*
Cathy White, *Bloomfield Area Cable Board Member*

And to the *thousands* of residents who engaged and participated in the multiple surveys, the online idea wall and/or the many in-person community forums,

we thank you!



We would also like to thank the BerryDunn Consulting team for their facilitation of the process.

Seth Hedstrom, *Principal*
Michelle Kennedy, *Project Manager and Facilitator*
Jen Ferguson and Keith Linton, *Facilitators*
Maddi Powers Spencer, *Facilitator and Research Analyst*



2025-

2029



STRATEGIC PLAN



CITY OF JANESVILLE

Wisconsin's Park Place

STRATEGIC PLAN 2025–2029



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Letter from the City Manager



Dear Janesville Community,

Over the past several months the residents and stakeholders of Janesville came together to have a spirited and interesting discussion on the City's future. The results of those discussion is the City's new 2025-2029 Strategic Plan. It serves as a framework to guide our priorities and actions over the next five years, ensuring we stay aligned with the goals and values expressed by you — our community members.

The plan encompasses our Mission, Vision, Guiding Principles, and Strategic Priorities. These were carefully chosen to address and enhance critical areas in our community. Our priorities will shape our operational strategies, budget allocations, and program implementations, ensuring that we meet the diverse needs of our city.

The Strategic Plan is only valuable if it is put to work. Now that the document is complete, it is time for our city leaders to work together to accomplish the aspirational goals and objectives it outlines. To this end, we will be incorporating this plan into the way we operate for years to come and reporting back regularly on our progress.

Your input has been invaluable in shaping this plan. Through online engagement, community forums, and direct conversations, we have gathered insights that are crucial to our collective vision for Janesville. This document is not merely a guideline for city operations; it is a testament to our commitment to work transparently and collaboratively with you all.

I encourage you to read through the Strategic Plan and consider how you might get involved in its implementation. Your engagement is essential as we move forward. Together, we will continue to be a great place for people to live and visit. Thank you for your continued support and collaboration.

Sincerely,

Kevin Lahner,
City Manager, City of Janesville

Why a Strategic Plan?



CITY OF JANESVILLE
Wisconsin's Park Place
STRATEGIC PLAN 2025–2029

What does it do?

We know our community has big dreams for City of Janesville and want to see them come true. Our strategic plan charts a course for the future that identifies the results we want to achieve. The strategic plan defines a shared vision for the future and focuses the City's resources on seven clearly defined priorities – community engagement, economic development, financial sustainability, housing for all, infrastructure, organizational excellence, and vibrant community – along with goals, objectives and clear measures for tracking progress and accountability.

At its core, the strategic plan maximizes our chances of realizing the City's vision by balancing the short-term, immediate reality with long-term goals that help us prepare for and navigate a changing environment. It provides a “north star” direction that keeps us on track and working together to keep our commitment to the City's mission and reach our desired destination. Track the progress of the City's strategic goals by visiting our Park Place Performs! dashboard at www.janesvillewi.gov/strategicplan.



Who we are



Mission Statement



An adaptive and welcoming community enriching lives.

Vision Statement



A vibrant and diverse community to discover life's opportunities.

Guiding Principles



Adaptability

We are creative and flexible in response to our community.

Respect and Diversity

We embrace diversity, empathy, and collaboration through a foundation of mutual respect.

Service

We serve with kindness, integrity, and professionalism. We are accountable for making ethical and innovative decisions that reflect community-driven goals.

Communication

We value honest and clear communication.

Equity, Inclusion, and Belonging

Through inclusive and equitable practices, we create spaces that reflect the diverse perspectives of our community and foster a culture of belonging.



Plan at a glance

The City of Janesville 2025-2029 Strategic Plan serves as the road map over the next five years to guide our community's vision. The City's strategic plan is a living document that creates a framework and the steps needed to meet and exceed our community's needs over the next several years. The mission tells us *"what"* we are to be doing. It keeps our elected and appointed officials and staff focused on the tasks to be done. The vision tells us *"where"* we are going. It keeps us focused on the destination and the future we are trying to create. The guiding principles tell us *"how"* to do what we are doing. They remind us of the way we intend to serve the people and community of Janesville.



Community Engagement



Our Goal



Strengthen our community by fostering an open and engaging environment, increasing participation in local initiatives, and collaborating with local partners to build a more connected, vibrant city.

Objectives

1. Promote a consistent, positive image of the city to attract and retain residents and businesses.
2. Utilize a variety of media outlets to encourage two-way dialogue with community members.
3. Foster stronger public confidence in the city through active communication and engagement.
4. Continue to promote city interests to county, state, and federal elected officials.
5. Continue to share the city's strategic goals to communicate progress and instill public trust.





Outcome Measures

- Develop a plan to enhance current communication outlets and conduct outreach with new outlets by May 2025.
- Publish a strategic plan update annually on the city website.
- Increase social media and digital engagement year over year by tracking metrics such as post reach, follower growth, and interaction rate (likes, shares, comments).
- Increased partnerships with local partners (measure the number of collaborations and partnerships with community groups, nonprofits, and businesses).



Economic Development



Our Goal



Promote businesses and growth throughout the city to maintain a positive business environment.

Objectives

1. Attract, retain, and expand businesses to diversify industries and jobs for better wages and community prosperity.
2. Support and develop entrepreneurs through existing community partnerships.
3. Sustain growth and development of downtown to boost the local economy.
4. Develop a new redevelopment plan for the former GM/JATCO Site.
5. Market and promote the business community to developers, brokers, and investors to foster relationships.
6. Advocate for development that positions the city as a desirable place to conduct business.
7. Continue to work with our partners to foster a regional business community that promotes the Rock County business environment.
8. Rewrite zoning code to maintain flexible zoning codes for evolving residential, commercial, and industrial developments.



Outcome Measures

- Increase in taxable value
(metrics: building permits, capital investment).
- New and existing employers adding new jobs.
- Complete a new zoning code update by December 31, 2025.
- Increase in median income.
- Number of new businesses created in the city.
- Continue implementation of the Arise plan.
 - Identified sites in Arise are developed and no longer vacant
 - Increase in residential units
- Increase in Tax Incremental District (TID) tax increment year over year.



Financial Sustainability



Our Goal



Maintain long-term financial responsibility through prudent management, varied revenue streams, and cost optimization.

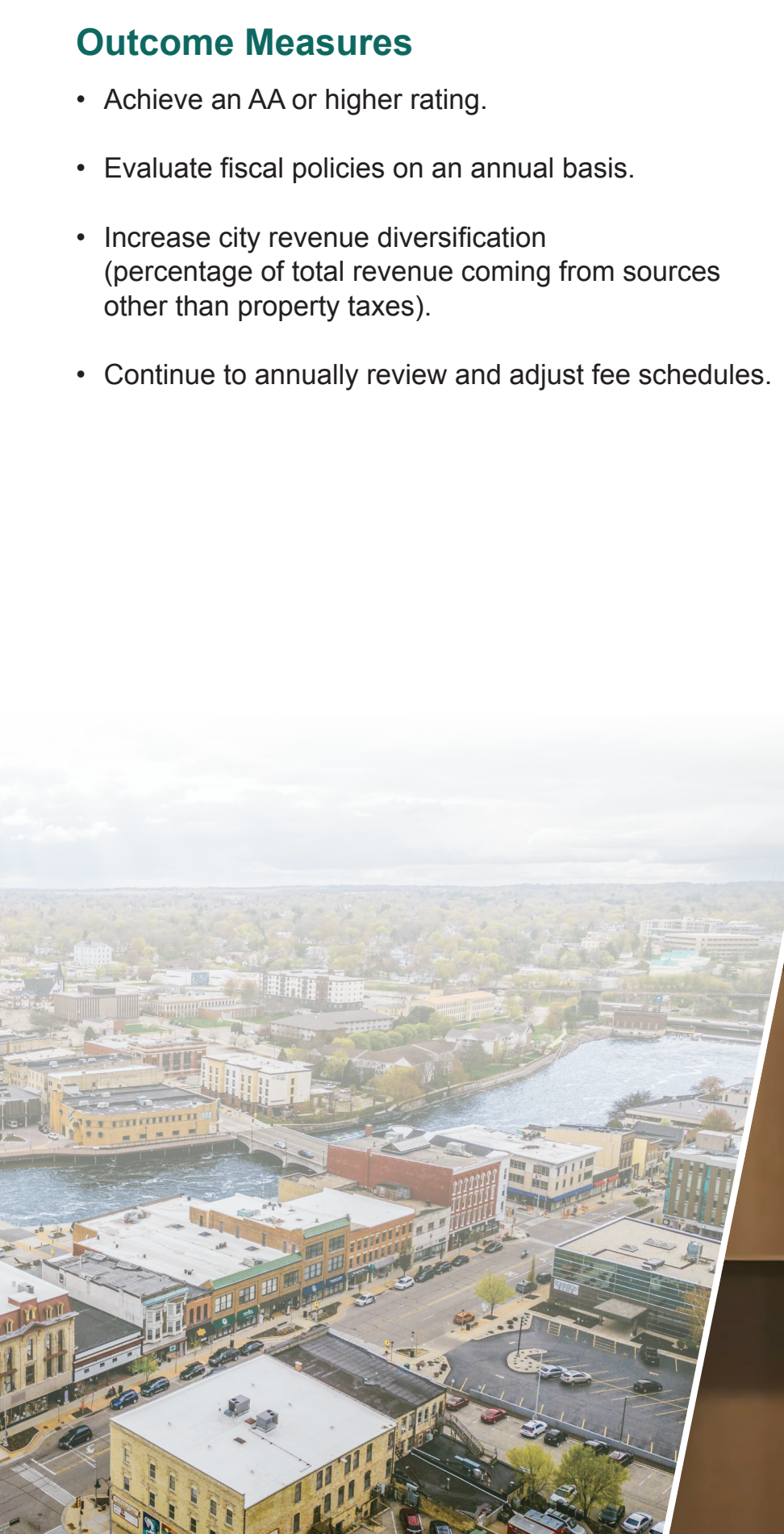
Objectives

1. Maintain fiscal policies that will result in an AA or higher bond rating.
2. Maintain procurement practices that result in the best product or service at the lowest cost.
3. Maximize equipment/product life cycles to minimize overall costs.
4. Collaborate with the community and leverage public-private partnerships (P3s) to be good stewards of limited city resources.
5. Explore and maximize revenue diversification opportunities to decrease the burden on property taxpayers.
6. Continue to advocate for a more equitable calculation and distribution of state-shared revenue rules.



Outcome Measures

- Achieve an AA or higher rating.
- Evaluate fiscal policies on an annual basis.
- Increase city revenue diversification (percentage of total revenue coming from sources other than property taxes).
- Continue to annually review and adjust fee schedules.



Housing for All



Our Goal



Promote and encourage the development and redevelopment of housing to increase accessibility and availability of housing across the economic spectrum.

Objectives

1. Leverage P3s to incentivize the creation of housing options that meet the needs of all residents throughout the city.
2. Revise zoning codes to better enable the production of diverse housing types and lot sizes at various price points.
3. Partner with county, state, and federal programs intended to boost housing repair and maintenance.
4. Continue to find and market residential development opportunities to investment partners.
5. Promote infill projects and revitalization efforts to encourage the utilization of vacant or underused land.



Outcome Measures

- Increase the total units added by occupancy type.
- Preservation of existing housing stock
(# of homeowner rehabilitation loans provided).
- Establish new partnerships and maintain current relationships
to increase the number of housing units.
- Development of infill lots (building permit issuance).



Infrastructure



Our Goal



Utilize best practices for routine maintenance, rehabilitation, and updates for city infrastructure, facilities, and assets.

Objectives

1. Maximize the life cycle of the City's assets (i.e., public infrastructure, streets, roadways, facilities, fleet, and equipment) through routine preventative maintenance and capital improvement programs (CIP).
2. Develop and maintain an efficient, safe, and varied transportation system based upon adopted long range plans, standards, and best practices.
3. Recognize the critical nature of information technology (IT) in public services and allocate resources accordingly to maintain and upgrade the City's IT hardware and software infrastructure.
4. Leverage technology in all work areas to improve efficiency and customer service.
5. Maintain resilient water, wastewater, and stormwater systems through active upkeep and Capital Improvement Plan that meet or exceed state and federal standards to maximize system redundancy and reliability.
6. Continue growing, sustaining, and ensuring the health of the landfill to achieve self-sufficiency.



Outcome Measures

- Decrease the number of water main breaks per year.
- Increase miles of water main replaced annually.
- Annual capital improvement investment in city building facilities based on Capital Improvement Plan (CIP).
- Increase the average street Pavement Surface Evaluation and Rating (PASER).
- Increase miles of street rehabilitated or reconstructed annually.
- Increase hardware and software replaced or upgraded annually.
- Track the number of help desk tickets resolved annually to establish a baseline of average time to resolve tickets.



Organizational Excellence



Our Goal



Continually strive for organizational excellence by valuing diversity, continuously improving and empowering our teams to deliver high-quality outcomes.

Objectives

1. Recruit, onboard, and retain a more diverse workforce that reflects the diversity of the community.
2. Enhance staff training opportunities to foster a more inclusive, equitable, and engaging work environment and promote a culture of continuous advancement.
3. Continue advancing the Diversity, Equity, Inclusion, and Belonging (DEIB) committee's work to promote the City's DEIB efforts and initiatives.
4. Implement and act on feedback from the City's cultural assessment.
5. Review and update City personnel policies to promote equity, inclusion, and workplace efficiency.
6. Continue to conduct after-action reviews (AARs) following significant city events to improve future planning, promote continuous improvement, and enhance emergency preparedness.
7. Empower employees to pursue innovative solutions and create an engaging workforce.





Outcome Measures

- City staff demographics.
- Decrease staff turnover rates.
- Increase staff training hours.
- Increase City investment on staff training and conference opportunities.
- Establish an annual review cycle of city policies.
- Conduct an After-Action Review (AAR) within 30 days following a significant city event.



Vibrant Community



Our Goal



Promote a safe and healthy community with amenities and activities to attract and retain a multi-generational community.

Objectives

1. Provide quality public safety services aligned with best practices and safety standards.
2. Train employees to help ensure emergency management preparedness.
3. Promote partnerships that enhance public safety, seek community involvement, foster a sense of ownership, and strengthen neighborhoods.
4. Provide various cultural and recreational opportunities that promote a sense of belonging and quality lifestyles.



Vibrant Community

Outcome Measures

- Decrease response times.
- Tracking emergency preparedness training attendance via sign-in sheets.
- Increase positive survey responses related to public safety year over year.
- Increase community event participation.
- Increase public safety events/hours.



How Did We Create This Plan?



The strategic planning process is as important as the final document itself. Input was incorporated from across the community and the City organization, including the City Council, employees, and leadership, residents, businesses, educators, youth, seniors, community-based organizations, and other community stakeholders. This helps ensure that we are being responsive to community priorities and needs and that City resources are aligned with those needs as well as with the government's organizational needs.



How Did We Create This Plan?



1,908

Online Interactions with Social Pinpoint
Virtual Engagement Platform



108

Ideas Wall
Comments



154

Survey Responses



3

Community Forums



37

Attendance at 3
Community Forums



35

Interviews and
Focus Group Participation



Plan Development Workshops

2



Direct emails to

3,244



Social Media with Post Reach of

13,140

What's Next?



We know our community has high standards and aspirations for the City of Janesville. We enjoy a high quality of life here and want to remain an excellent place to be. The plan's five-year timeline allows for thoughtful sequencing of initiatives that will make our continued high quality of life possible.

With the strategic plan in place, the City is building an implementation plan to translate the priorities, goals, and objectives into action steps with assigned responsibilities and established timelines. This will allow City departments to work together to achieve our desired future. Regular monitoring and evaluation systems will be put in place to help ensure continuous improvement and ongoing alignment with the City's vision and strategic priorities.

We are committed to focusing resources on the priorities that best serve the needs of the community as captured in this plan,, so we will align the strategic plan with the City's annual budget process so we can ensure that resources are utilized efficiently and directed toward the most important priorities. As needs or opportunities shift during the life of the plan, the City expects to address any needed changes as part of the annual budget process. And, with the strategic plan as a guide, other City plans and initiatives can be built to align so that everything is flowing in a common direction. The values expressed in this plan will drive how the City makes decisions and delivers services, and employees will apply these principles in their day-to-day work.

Keeping Track of Progress

The City will monitor progress toward strategic plan goals and objectives and report on performance measures. Tracking keeps us transparent and holds us accountable. We will provide the community with an annual report and year-end presentation to the City Council. Community members can expect to understand what we are working on and the benefits that will result for our residents, businesses, and the community overall.

Monthly –

City staff will discuss and evaluate progress on strategic goals and objectives.

Quarterly –

City leadership will provide the City Council with progress updates for each strategic plan priority.

Twice a Year –

The City Manager will prepare an update to the City Council for each strategic priority, including progress updates, successes and wins, and challenges.

Annually –

The City Manager will prepare a year-end update detailing progress on each strategic priority, goal, and objective. The report will be presented to City Council and shared with the community on the City's website www.janesvillewi.gov.

Acknowledgements

This strategic plan results from the combined efforts of our City's elected officials, employees, and community members. The City of Janesville would like to extend sincere thanks to everyone who saw the importance of this plan and dedicated their knowledge, guidance, and time over the past several months to bring it to life. Your contributions are the bricks that build the foundation for our future.



City Council

City of Janesville Staff

Community Leaders

Forward Janesville, Inc

Residents of Janesville

We would also like to thank the BerryDunn Consulting team for their facilitation of the process.



Principal: Seth Hedstrom

PM and Facilitator: Charline Kirongozi

Facilitator: Jen Ferguson

Research Analyst: Maddison Powers Spencer



CITY OF JANESVILLE

Wisconsin's Park Place

STRATEGIC PLAN 2025–2029





City of
Waukesha
STRATEGIC PLAN • 2024-2029

FROM THE MAYOR

On behalf of our elected officials and City staff, I want to thank you for your contributions to the City of Waukesha. As we strive to be a place of choice for people, businesses, and community, it is crucial to have a compass to guide the organization. My last 10 years as Mayor have shown me the importance of the city-wide Strategic Plan: to lead the City in decision making and actions. It is the Strategic Plan that provides a comprehensive framework to focus the work and priorities of the City staff and Common Council toward accomplishing specific goals for the next five years.

The Plan contains our Mission Statement, which describes our purpose and reason for existing. Our Vision Statement defines our desired future and provides direction for where we want to go as a community. Our Core Values state how the organization and City staff will conduct its business, make decisions, and deliver programs and services to the community. Strategic Priorities and the supporting Objectives and Performance Measures define the specific factors the City staff will focus on.

I believe the Strategic Plan will lead us into a bright and wonderful future for ours and future generations. I am especially grateful to our elected officials and the many community members who actively participated in this important and significant process.

*Thank you for making Waukesha
a desired place to be.*

Thank you,

Mayor Reilly



FROM THE CITY ADMINISTRATOR



Thank you, City of Waukesha community, for participating and being a part of the Strategic Plan for the City's future. The Strategic Plan has been adopted by the Common Council and will serve to guide the work of the City for the next five years. This plan reflects the hard work of your elected Councilors, residents, businesses, advisory boards and committees, a broad array of community groups, department heads, and employees.

In this document you will find our City's Mission, Vision, Core Values, Strategic Priorities, and Goals. There are specific steps, the actions that must be taken if we are to arrive at the desired destination. It is important to view this document as a road map. Our continued success will depend on following the direction and objectives provided to make our Vision for Waukesha a reality.

Thanks to all of you for your many meaningful contributions to this Strategic Plan.

We look forward to implementing the Strategic Plan in collaboration with all of our internal and external partners.

Anthony Brown



Our Government

The city of Waukesha operates under a mayor-council form of government.

At the helm is the mayor, who serves as the chief executive officer, and a City administrator who oversees day-to-day operations. Supporting the mayor are the Common Council members, who are elected representatives from various districts within the city. The Common Council plays a crucial role in legislative decision-making, including passing ordinances, approving budgets, and setting policies. Collaboration between the elected officials and administrative staff helps ensure efficient governance and responsiveness to the needs of Waukesha residents.

Regular meetings of the Common Council are held in the City Hall Council Chambers on the 1st and 3rd Tuesdays of each month.

www.waukesha-wi.gov/CityCouncil



Mission Statement



(Where we're headed)

We are dedicated to fostering a high quality of life in Waukesha through efficient, effective, and engaging government.

Vision Statement



(Our shared idea of the future)

Waukesha is an accessible, vibrant, and desirable community where diversity is celebrated, and sustainably sound and innovative practices are prioritized.

Core Values



(Expectations for City decision making and service delivery)

Be of Service

To each other by enhancing, innovating, and providing high levels of customer service to the community.

Be Open

By connecting, listening, responding, and engaging.

Be Accepting

By supporting change, showing consideration, and being inclusive.

Be Responsible

By forward-thinking, owning the work, and showing accountability and integrity.

Above All

Be focused on ensuring the community is safe and secure.



***Our Goal** (Where we're headed)*

We will manage resources in ways that focus on fiscal stability, resilience against economic challenges, and balanced approaches to funding the needs of the community.

Objectives/Performance Measures

(What we'll focus on to get there | How we'll know we're successful)

OBJECTIVE 1

Develop a five-year financial plan that forecasts budget balancing challenges, opportunities for efficiencies, and capital investment needs.

Performance Measure

1. Number of balanced years in annual updated General Fund five-year projection

OBJECTIVE 2

Review and update (if necessary) all financial policies and management tools to include organizational and departmental strategies that are modern and based on best practices.

Performance Measures

1. All financial City policies will be updated by December 2026.
 - Progress of updating existing policies and/or drafting additional policies will occur in each year leading up to December 31, 2026
2. Number of financial policies reviewed, updated and/or created in the year.
3. Number of interim financial reports produced each year.
4. Maintain a bond rating of Aa2 and strive to increase to a bond rating of Aa1 by April 2029.



OBJECTIVE 3

Review existing debt obligations and potential new debt for capital investments so that the City's principal balance decreases annually.

Performance Measures

1. Decrease levy-supported General Obligation (GO) debt balance.
2. Develop a 10-year asset inventory for fleet, facilities, and equipment by December 2025.
3. Annually update asset inventory for fleet, facilities, and equipment.

OBJECTIVE 4

Review all current revenue sources and identify possible new non-levy revenues to pursue.

Performance Measures

1. Annually review property tax-based support for all departmental operations that have revenue-generating activities.
2. Develop a citywide sponsorship/partnership fundraising approach that is coordinated across all departments.
3. Increase parking revenue by 15% by instituting surface lot automated pay structure by December 2029.
4. Increase Drop-Off Center revenue by 15% to get closer to budget neutral by December 2029.
5. Increase City garage revenue by 15% by providing additional inter-governmental services by December 2029.
6. Annually review, and increase, if reasonable, the cost recovery for City services that have revenue-generating activities.

OBJECTIVE 5

Review all current expenditures and cost savings opportunities.

Performance Measures

1. Decrease operational costs at the Clean Water Plant by \$100,000 by December 2029.
2. Reduce credit card processing fees by consolidation of services used by multiple departments by December 2029.
3. Complete Department based service inventories and ranking of tasks by priority by December 2025



Our Goal (Where we're headed)

We will encourage an organizational culture that embraces diversity, learning, and innovation in service delivery.

Objectives/Performance Measures

(What we'll focus on to get there | How we'll know we're successful)

OBJECTIVE 1

1. Conduct an organizational assessment and create a long-term staffing plan that meets and maintains City obligations and commitments.

Performance Measures

1. Develop departmental training plans as part of the annual budget process.
2. Establish cross-training opportunities across departments and implement a plan by December 2026.
3. Develop an Employee Engagement Survey Plan by December 2025 and conduct an annual survey to measure engagement.
4. Create succession plans within all departments by December 2025.
5. Update Departmental Strategic Plans (every five to eight years).
6. Develop a Comprehensive Master Plan for the Cemetery Department by December 2026.

OBJECTIVE 2

Leverage technology solutions to enhance efficiencies in service delivery to streamline processes, reduce costs, and improve the quality of services.

Performance Measures

1. Develop processes to reduce time from application to time of hire by December 2025.
2. Complete software, subscription, and hardware inventory organization-wide by December 2024.
3. Eliminate redundant, underused software by March 2025.
4. Identify a system to conduct customer feedback surveys by December 2025.
5. Implement new permit software to increase the number of city services available online by December 2027.



OBJECTIVE 3

Recognize, encourage, and reward creative thinking, innovation, experimentation, and calculated risk-taking through enhanced employee recognition programs.

Performance Measure

1. Create enhanced employee recognition programs by December 2025.

OBJECTIVE 4

Provide resources to develop an employee recruitment and retention program that includes training and professional development activities.

Performance Measures

1. Hold full City Leadership Program classes (at least 12 participants) every year.
2. Offer at least six programs for the Leadership Alumni Group every year to have an engaged and informed workforce and continue to nurture leadership skills.
3. Offer one Tony Time training topic every month.
4. Track number of applicants received via job fairs/table events.
5. Develop an internship program with schools by December 2025.
6. Develop a mentorship program for new hires with initial emphasis on high-turnover departments by December 2026.
7. Create a safety committee to track improvements in employee safety by March 2025.
8. Serve the community through volunteering efforts within the City two to three times a year.
9. Establish clear onboarding procedures for all new employees and in each department by June 2025.



Our Goal (Where we're headed)

*Stimulate economic and community vibrancy
where all can live, gather, work, and recreate.*

Objectives/Performance Measures

(What we'll focus on to get there | How we'll know we're successful)

OBJECTIVE 1

1. Focus capital investments on new and existing mobility and accessibility infrastructure, neighborhood cohesiveness, culture and recreational spaces, and transportation improvements.

Performance Measures

1. Positive change in Livability Score the American Association of Retired Person (AARP) and satisfaction focused on community accessibility initiatives (baseline: 59, increase 2 – 3 points in five years).
2. Implement the Freidman Alley Placemaking Plan by December 2028.
3. Track the number and types of community plans developed/updated.

OBJECTIVE 2

Update Standard Development guidelines on a biannual basis and require new development to adhere and build to the standards.

Performance Measure

1. Increase the number of workforce style housing units year over year.

OBJECTIVE 3

Update all zoning codes to promote the construction of additional housing and make it easier to redevelop parcels in the City.

Performance Measure

1. Update zoning code by the end of December 2025.

1. "The AARP Livability Index is created from more than 50 unique sources of data across the seven livability categories. Using these metrics and policies, the AARP Livability Index scores communities by looking at how livable each neighborhood is within the community."



OBJECTIVE 4

Implement items approved in the 2023 – 2027 Waukesha Area Transit Development Plan.

OBJECTIVE 5

Implement improvements from the adopted 2023 Sidewalk Plan to increase pedestrian safety and mobility by increasing sidewalk connectivity.

Performance Measures

1. Complete all areas identified as high priority in the Sidewalk Plan.
2. Update the Bicycle/Pedestrian Plan by December 2028.

OBJECTIVE 6

Update the Park and Recreation System Master Plan (Park and Open Space Plan) that focuses on maintaining and improving existing park and open space. Require projects to adhere to plan priorities.

Performance Measure

1. Number and type of park and/or bicycle and pedestrian-focused improvements completed.

OBJECTIVE 7

Review City facilities for meeting Americans with Disabilities Act (ADA) guidelines and create a comprehensive plan to update facilities not meeting the mandated requirements.

Performance Measure

1. Track the number of ADA improvements made annually (once the City identifies the list of improvements needed that will establish the annual goal).

OBJECTIVE 8

Partner with and create a Business Recruitment Plan (including a list of financial incentives that are available for desired development projects) to attract and support new businesses in the downtown Business District.

Performance Measure

1. Create the Business Recruitment Plan by December 2026

OBJECTIVE 9

Collaborate with other governmental entities to review underutilized parcels in the City owned by other governmental entities to develop a plan to repurpose said parcels.

Performance Measure

1. Develop a plan by December 2025



Our Goal (Where we're headed)

Promote open communication and active participation, information-sharing, and a sense of belonging within our community.

Objectives/Performance Measures

(What we'll focus on to get there | How we'll know we're successful)

OBJECTIVE 1

1. Inform the community about City accomplishments, roles and responsibilities, and progress toward strategic initiatives through all City communication channels.

Performance Measures

1. Increase the use of WisVote for creating registrations and absentee requests or obtaining poll/ballot information by 20% by calendar year end through additional public outreach areas.
2. Annually review and update the Resident Guide.
3. Increase Department of Public Works (DPW) events/public outreach for the personal care product and Municipal Separate Storm Sewer System (MS4) responsibilities.
4. Increase engagement on social media year over year.
5. Review options to provide paperless City communications to identify whether waste and expense can be reduced by December 2025.

OBJECTIVE 2

Develop multilingual communication methods to enhance the community experience for all residents.

Performance Measures

1. Create a plan for communicating with multilingual audiences by December 2025.
2. Maintain ADA, Section 508, and Web Content Accessibility Guidelines (WCAG AA) compliance on all digital items related to the public (website, social media, kiosks, message boards, etc.) to ensure consistent and equal experiences for as many residents as possible by conducting a yearly compliance audit.



OBJECTIVE 3

Implement a periodic community survey program that serves as a tool to update and enhance communication and services to a diverse community.

Performance Measure

1. Conduct biannual community survey.

OBJECTIVE 4

Encourage and provide opportunities for partnerships between social, civic, church, and community support organizations.

Performance Measures

1. Increase the number of volunteers (hours) annually.
2. Unify volunteer efforts across all departments and programs to increase engagement and opportunities for the community.

OBJECTIVE 5

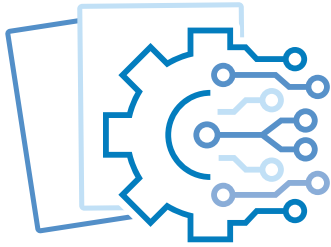
Provide a variety of engagement opportunities for residents to seek information about the community.

Performance Measures

1. Fill classes (at least 20 participants) in the Local Government Academy annually.
2. Increase the number of community events (table/booth) where a City representative/information is present.
3. Develop a community-focused survey to target Community Safety topics by December 2025.
4. Increase outreach to the community and the number of Community Safety programming year over year.
5. Increase the rating of “residents’ connection and engagement with their community” as asked on the National Community Survey (increase from 58% by December 2029).
6. Investigate options for a centralized Citywide citizen request portal and app by December 2025.
7. Identify systems for targeted communications to residents (so the City can communicate directly with businesses, neighborhoods, dog owners, etc.).



HOW DID WE BUILD THIS PLAN?



Documents + data sources
reviewed and used for
environmental scan **24**



Online interactions
with Social Pinpoint
1,100



Survey responses **90**



Ideas Wall
comments

132



People interviewed **56**



Community forums **3**

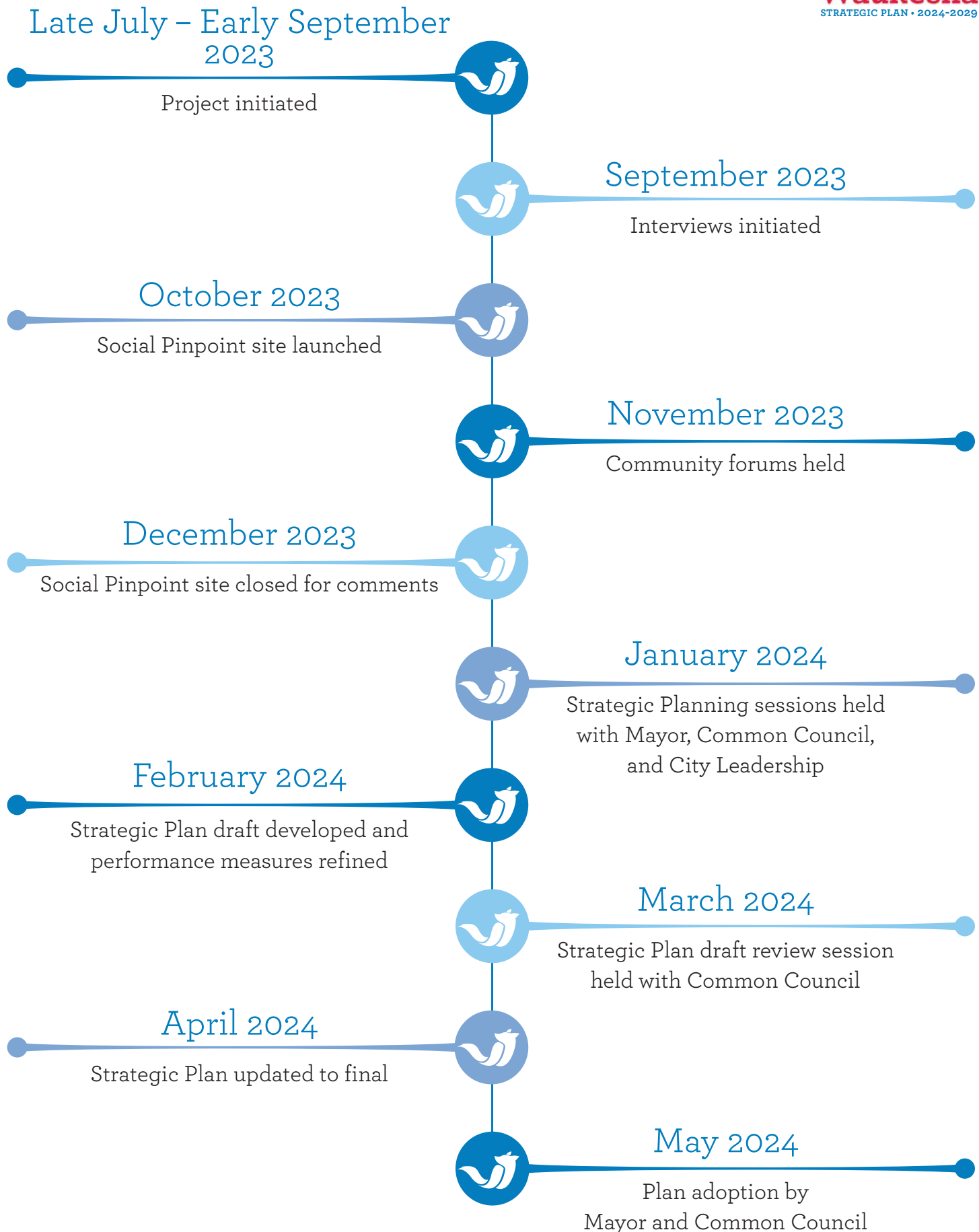


Council workshops
and presentations **3**



City Leadership meeting **1**

HOW DID WE BUILD THIS PLAN?



Putting the Plan into Action

Now that the plan has been adopted, the focus shifts towards implementation and execution. This involves breaking down the plan into actionable steps, assigning responsibilities, and establishing timelines. Regular monitoring and evaluation are essential to help ensure alignment with organizational goals and adaptability to changing circumstances. Additionally, communication plays a crucial role in keeping stakeholders informed and engaged throughout the implementation process. We hope you stay involved as we work through accomplishing our vision.

Keeping Track of Progress

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

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

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

Monthly

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

Quarterly

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

Twice A Year

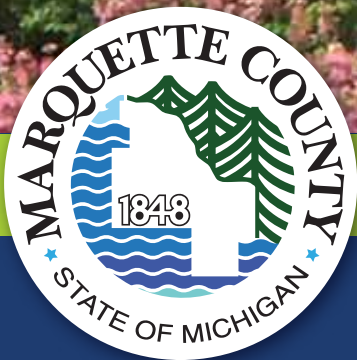
The City administrator will provide the Common Council with an update on progress toward each strategic priority and goal, including successes and challenges.

Annually

The City administrator will provide a year-end report detailing progress on each strategic goal and objective. The report will be presented to the Common Council and posted on the City's website, www.waukesha-wi.gov/strategicplan, for community access.



City of
Waukesha
STRATEGIC PLAN • 2024-2029



STRATEGIC PLAN • 2023-2028

EMPLOYER
OF CHOICE

TECHNOLOGICAL
INNOVATIONS

SUPERIOR
STREAMLINED
SERVICES

STRONG
ECONOMY

SAFE AND
HEALTHY
COMMUNITY

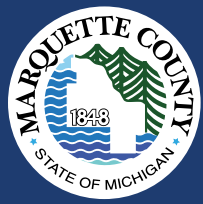
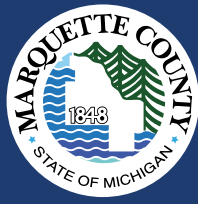


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BOARD CHAIR LETTER



BOARD CHAIR LETTER

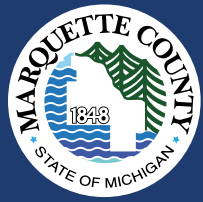
Marquette County, its elected officials, its management team, and its employees take seriously the stewardship entrusted to us for the County's resources, along with the County's rich history and promise of a bright future.

This strategic plan is an essential tool in laying out ways we can make Marquette County stronger. While we continue with our clear focus on delivering excellent service each and every day, this document represents our commitment to work at a higher level and to achieve the County's vision.

This plan is a starting point toward a better future – its success depends on all of us working together – the County Board, County staff, and elected officials – to implement the plan, report and evaluate its progress and make the adjustments necessary to continue moving the County forward.

Though the strategic plan is an essential tool for Marquette County, we also hold the strategic planning process in high value. The strategic planning process was educational, engaging, and collaborative. A great foundation to move forward with implementation is established and we look forward to the work ahead.

Gerald Corkin



OUR MISSION & VISION

MISSION STATEMENT

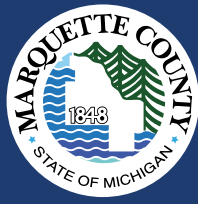
Through leadership, innovation, and collaboration, the County of Marquette is committed to using its resources wisely to provide services that improve quality of life and foster a county-wide sense of community.

VISION STATEMENT

Marquette County is a regional leader providing superior services by investing in its employees and supporting its businesses and regional partnerships to encourage a thriving economy, preserve its natural beauty, and create a safe, healthy, and connected community where all are supported.



GUIDING PRINCIPLES



OUR GUIDING PRINCIPLES

Engaged and Empowered Employees

We enhance dialogue and reciprocal information sharing with our county workforce in ways that engage them in decision-making and empower them to carry out their work in the most effective ways possible.

Collaboration

We partner inter-departmentally, with neighboring governments, and with community groups to leverage our collective resources, knowledge, ideas, and experiences to proactively address issues and solve problems at the source.

Embracing Diversity

We create an inclusive community where everyone is welcomed, diversity is celebrated and the perspectives and opinions of all are used to develop, support, and maintain superior services that are equitable and accessible.

Accountability and Integrity

We respect our commitment to the public by communicating in ways that are open, honest, and proactive so that we can increase awareness and understanding and always remain committed to serving with high ethical standards.

Financial Health and Sustainability

We utilize financial resources in creative ways to maximize efficiency, ensure solvency, and support the responsible growth of our community.

Resilience and Tenacity

We employ local solutions and the fortitude and endurance of our community to rise above challenges, celebrate successes, and remain strong into the future.

Innovation

We pioneer new ideas, new conversations, and new methods of service provision and problem solving to move our community forward.



EMPLOYER OF CHOICE

Implement flexible, creative, and diverse methods of training, retaining, and communicating with our workforce so that all feel valued, recognized and can take pride in the work environment.

Objectives

- Develop and support meaningful and effective employee recognition and benefit programs that can be sustained over time
- Develop processes, procedures and training that enhance the employee experience and increase job knowledge and effectiveness
- Complete a comprehensive classification and compensation study
- Implement security measures to ensure the safety of the County's employees

Outcome Measures

- Employee Training Needs Assessment completed by end of 2023
 - Develop Training Needs Implementation Plan by end of 2024
- Complete Flex Time Analysis by end of 2023
- Establish program and benchmark measurements for employee onboarding by end of 2023
- Increase number employees participating in wellness activities year over year



SUPERIOR STREAMLINED SERVICES



STREAMLINED SERVICES

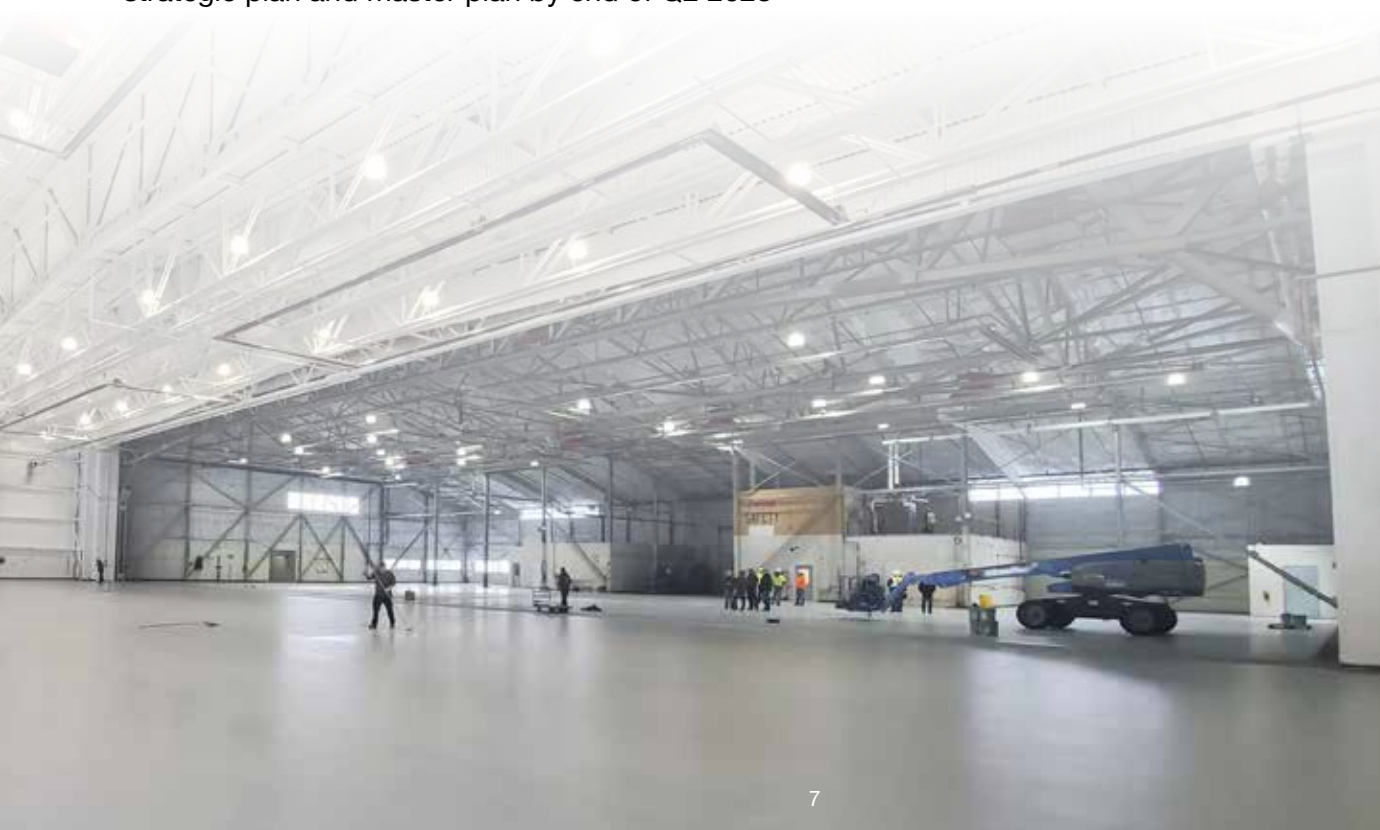
Develop and implement processes and systems that provide cost-efficient, equitable access to superior services and programs through collaboration, use of technology, increased communication, and centralization.

Objectives

- Expand access to County services by increasing online capabilities
- Maximize the use of County facilities and spaces for efficient county functions
- Enhance external communication processes and methods to increase information sharing and understanding
- Establish a structure and process for leadership to develop and implement collaborative goals, objectives, and projects

Outcome Measures

- Analyze current services offered online by Q2 2024
 - Develop milestones/measures for online services once analysis is complete
- Establish County space utilization ratio for benchmarking (in use/vacant, etc.)
- Establish benchmark measurement for public engagement (community survey) and increase % year over year
- Develop branding and design guidelines for the County logo and mission statement by end of 2025
- Develop a centralized social media/communications strategy by end of 2024
- Rewrite capital improvement program ranking criteria to align with the county strategic plan and master plan by end of Q2 2023





TECHNOLOGICAL INNOVATIONS

Implement streamlined, integrated, and holistic technology solutions that increase efficiencies, improve effectiveness, and enhance service provision now and in future years.

Objectives

- Conduct a County-Wide IT Needs Assessment
- Develop an IT Master Plan that aligns with findings of IT Needs Assessment
- Fill position to address technological-related opportunities

Outcome Measures

- IT Needs Assessment developed by Q2 2024
- IT Master Plan developed by Q4 2024
 - Develop 5-year Capital Plan based on Master Plan by Q4 2024
- Create and fill new position to oversee systems integration and workflow streamlining by end of 2024
- Complete virtual courtroom upgrades by end of 2023
- Upgrade servers by end of 2023
- Upgrade jail intercom and cameras by end of 2023



SAFE AND HEALTHY COMMUNITY



SAFE & HEALTHY COMMUNITY

Pursue initiatives, programs and or conversations that protect the community's health, safety, and the environment that align with our strong local culture.

Objectives

- Ensure the community's safety by providing appropriately resourced law enforcement and exploring alternatives to incarceration where feasible
- Maximize use of opioid funding to decrease substance abuse
- Facilitate discussions and outreach with health educators, health care providers, universities, and other key community leaders to increase access to mental health services and decrease substance abuse
- Reduce the County's carbon footprint internally and community-wide by promoting educational opportunities and applying sustainable practices (i.e., electric vehicles, EV charging stations, recycling)
- Increase awareness of healthy lifestyles and pursue funding to do so

Outcome Measures

- Establish staffing capacity benchmark for Sheriff's Department
 - Fill all open positions
- Develop Opioid Addiction Action Plan using Opioid settlement funds by Q2 2023
- Establish benchmark measurement(s) to evaluate substance abuse service provisions by end of 2023
- Establish benchmark measurement(s) to evaluate mental health service provisions by end of 2023
- Pass a Climate Resolution by Q2 2023
- Develop benchmark measurement(s) to monitor reduction of the County's carbon footprint by end of 2024, such as:
 - number of climate resolutions passed with the County's assistance by X date
 - X% increase in products recycled by X date
- Increase the number of healthy lifestyle events partnered by County





STRONG ECONOMY

STRONG ECONOMY

Support and promote a resilient economy that attracts and retains a diversity of businesses, workers, and industries that enhance and support the quality of life in Marquette County.

Objectives

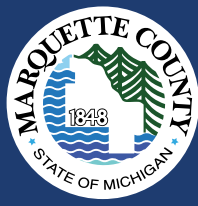
- Support economic development and attainable housing in collaboration with local partnerships (monitor performance of the County's contracted EDO and ensure the County is leveraging and making the best use of available resources)
- Reduce barriers to development and redevelopment of county-owned properties in the Sawyer industrial area
- Streamline development processes to reduce barriers and enhance support for small businesses and entrepreneurs
- Continue to support renewable energy initiatives to potentially stabilize energy costs locally
- Foster the County's relationship with the Marquette County Transit Authority to modernize service and simplify user interfaces
- Explore options for supporting community-wide broadband using ARPA funding

Outcome Measures

- Meet with EDO quarterly to monitor and assess performance
- Ready for new development at Sawyer by Q1 2024
- Complete Airport Terminal Renovation by end of 2026
- Complete Airport Rebranding by Q2 2023
- Update Airport Layout Plan by end of 2023
- Invest transit ARPA allocation by December 31, 2023
- Invest broadband ARPA allocation by December 31, 2023



ACKNOWLEDGEMENTS

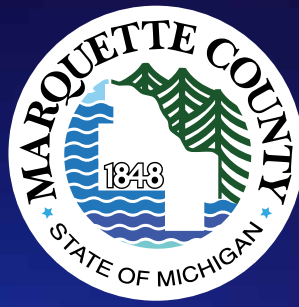


This Strategic Plan is the result of the combined efforts of our employees, appointed members of County committees, department heads, elected officials, and the Board of Commissioners. Marquette County would like to thank all those who participated in the process of providing knowledge and insights that informed the development of the plan.

We would also like to express gratitude to the BerryDunn consulting team who provided direction and expertise throughout the planning process.

ACKNOWLEDGEMENTS





STRATEGIC PLAN

2023 - 2028



SBRAND SOLUTIONS

PROPOSAL FOR CITY OF NOVI, MICHIGAN

STRATEGIC PLANNING SERVICES



Strategic. Sustainable. Success.

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@sbrandsolutions.com | (970) 208-6633

www.facebook.com/SBrandSolutions
www.linkedin.com/company/sbrand-consulting

{SBrand}
HELPING YOU FILL IN THE BLANKS



January 20, 2025

Victor Cardenas, City Manager
Finance Counter, 2nd Floor
City of Novi
45175 Ten Mile Road
Novi, Michigan 48375

Request for Proposal: Facilitation of Community Strategic Planning Process

Dear Mr. Cardenas;

I are excited about the opportunity to collaborate with the team at the City of Novi in facilitating a process to create a community driven strategic plan (Novi 2050). Our experienced team, with over 55 years of combined expertise in strategic planning and organizational assessments, has a strong history of working with and for local government organizations, and we've collaborated on communities who have never done strategic planning to agencies who have a long and successful history of implementing strategic plans. We've worked with several cities across the country and are well aware of the applicable statutes, regulations and other relevant issues governing public agencies in Michigan.

With my background in key local government roles such as Assistant County Administrator, Economic Development Director, and Community Development Director, I possess a nuanced understanding of the challenges faced by cities and public organizations nationwide. The resulting document will be a guide or roadmap for community priorities and goals and will include timeframes, realistic measurements, and measurable results.

I'm excited by the opportunity to work with the City of Novi, in large part because your stated outcomes and values for this project directly align with our values and methodology:

- Broaden the conversation to incorporate a wide range of perspectives
- Be inclusive in our efforts, reaching out to hear from voices that may not have participated in the past
- Involve the community in a meaningful way, building consensus so that they understand and support the final results (that feeling of ownership)
- Create a shared vision and innovative, adaptable goals that are a roadmap to the future



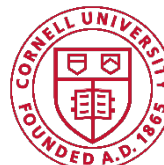
- Develop actionable results that can be measured
- Be completely transparent throughout the project
- Adopting a living strategic plan, one that is applied in both practical and visionary ways that will continue the discussion about the future of Novi

As a Certified Master Facilitator™, I lead a hand-picked team dedicated to delivering tangible results **based on engagement, collaboration, and consensus building**. Our process emphasizes engagement involving your community members, staff, stakeholders, partners in the community and even regional and state organizations. An [article published in ICMA Magazine](#) highlights our approach to inclusive engagement.

We appreciate the longer time frame for this work – the depth and breadth of community engagement often takes months (especially over the summer). We do believe we could deliver this work by January of 2026, but our timeframe does follow the request in the RFP for May 2026 adoption. This proposal is our offer which is good for a one hundred eighty (180) calendar day period from the date of opening. We submitted this proposal without any collusion with any other person or entity submitting a proposal pursuant to this RFP. I would be the person responsible and authorized to make representations for the firm.

Thank you for considering us as a partner. I am eager to further discuss our proposal and explore the potential collaboration that lies ahead and look forward to the opportunity to contribute to your strategic planning efforts.

Respectfully,



Sheryl Trent
Owner, SBrand Solutions
2850 SW 50th Terrace
Cape Coral, Florida 33914

www.sbrandsolutions.com
(970) 208-6633
sheryl@sbrandsolutions.com



Statement of Addendum

We are in receipt of Addendum 1 and Addendum 2 for this RFP.

Qualifications and Experience: Firm Overview

Established in January of 2011, SBrand Solutions is a woman owned LLC firm with unique expertise in working with local government clients to solve problems and “fill in the blanks.” As a professional strategic planning and facilitation firm, we partner with your team through solutions *and* implementation. SBrand Solutions has successfully facilitated and implemented numerous Strategic Plans for cities and government organizations similar to your organization. You can view several examples of the Strategic Plans and Implementation Plans that we create with our clients at our [Google Drive project example archive](#).

We have five areas of core expertise:

- ✓ **Consensus Focused Facilitation**
- ✓ **Results Based Strategic Planning**
- ✓ **Systematic Organizational Assessments**
- ✓ **Collaborative Team Development**
- ✓ **Inclusive Community Engagement**

This is what makes us different: What sets us apart is our genuine understanding of city operations, thanks to our real-life experience working as employees in this sector. Additionally, our team consists of certified facilitators who are trained in the specialized tools and methods necessary to deliver the results you require. Over the years, we've collaboratively crafted more than 100 strategic plans for local government clients. Our approach combines this unique perspective on strategic planning with innovative methods to gather information and feedback, making us the ideal choice as your partner.

We always employ a strategic framework and a proven methodology that not only encourages but necessitates diversity, equity, and inclusivity to achieve the best results. With our deep-rooted experience in local government, professional facilitation certifications and strategic planning expertise, we know how to pose the right questions to the right people, in the most effective manner (the R3 principle).



The SBrand team is a diverse group of professionals with expertise spanning various areas, including government finance, economic development, community development, parks and recreation, public works, community safety, civic engagement, team assessments, communications, board, and team development and much more. We deliberately limit our client base to ensure that we provide the exceptional service that is our hallmark, and we tailor our results and interaction to meet your specific needs. Our approach is based on a proven methodology that is tailored to your unique requirements. As your strategic partner, we work collaboratively to develop a strategic framework and implementation plan, complete with measurements, progress tracking methods, and clearly designated roles and responsibilities for your staff.

As a boutique firm, we offer our clients the following which is one of our many distinguishing characteristics: **You will ALWAYS collaborate with the people in this proposal.** We will NEVER assign you to a less qualified staff. "Who you see here is who you will be working with on the project." That allows us to build a true relationship with you (over 60% of our work is with a prior client, and an additional 15% of our work is from a referral) over the course of the project and better understand all the complexities of your situation.

Profiles of Key Team Members



Sheryl Trent

Sheryl will serve as primary business contact, project manager and lead facilitator. Sheryl served as a city manager, assistant city manager and department director in cities and counties for over 28 years. Additionally, she is one of fewer than 50 Certified Master Facilitators® in the world and is a Certified Virtual Facilitator™. She also holds a certification from Cornell University in Diversity, Equity, and Inclusion. Her real-life experience includes managing long range plans, strategic plans, comprehensive plans, multimillion-dollar capital projects, economic development agencies and Urban Renewal Authorities; and, in combination with her nonprofit City Council service, her experience provides a unique understanding of the needs of clients.

She serves on [the Board of the International Institute for Facilitation](#), the world's leading institution for facilitation research and innovative learning. She is a member of the Association for Strategic Planning, the National Center for Deliberative Debate, several local government associations and groups and a regular speaker and contributor to various platforms on facilitation and inclusion. She has an MPA from the University of Washington and holds a CPM from ICMA.



Zach Ratkai

Zach Ratkai is a government collaborator and champion of the public sector with over 21 years of experience working in and with municipalities throughout Colorado and Washington. He is the Local Government Programs Director with the Benton-Franklin Council of Governments and specializes in collaborating with communities and non-profits to create functional and collaborative cultures to serve their missions.

Zach holds a master's degree in public administration and a graduate certificate in public management from the University of Colorado. He also holds a bachelor's degree in Applied Geography from the University of Northern Colorado. Zach's work in government experience includes economic development, city planning, government administration and political advocacy, -- a journey that has taken him to the Colorado and Washington State Capitols, the US Capitol, and the White House to advocate for the interests of local communities.



Mitzi Rapkin

Mitzi will serve as a second lead facilitator and is a Certified Structured Facilitator, Certified Virtual Facilitator™, and is certified in Foundations in Public Participation by the International Association for Public Participation. Her portfolio includes work helping nonprofits, libraries, educational institutions, volunteer boards, and governments articulate and achieve their goals. She has worked in communications and public engagement for more than 15 years and has 30 years of experience as a journalist, interviewer, and writer. She is the producer and host of a literary podcast called *First Draft: A Dialogue on Writing* and has interviewed more than 400 authors in the last decade.

Mitzi's passion is helping individuals and groups reach and achieve their potential and distilling big, complicated, abstract ideas into concise and digestible language. She is a creative thinker and inspires groups to approach themselves and solve problems in new ways.

She holds an MS in Journalism from the Medill School of Journalism at Northwestern University, an MFA in Creative Writing from Warren Wilson College, and a BA in English and Religion from Indiana University. She is also an International Coaching Federation Certified Professional Coach.



Antoine Desabille

Antoine is a professional administrative support executive. He is enthusiastic about helping clients achieve the highest quality solutions, through innovation and amazing customer service. He is a Certified Virtual Facilitator® and provides technical and programming support for our virtual and hybrid meetings. He loves to play the guitar, listen to music, remember useless movie trivia, play basketball with friends, and enjoy the outdoors.

Note that SBrand Solutions has several other professional facilitators available to assist if needed and works with a professional graphic design firm.



References with Example Plans

Please see the following reference projects, along with links to review their completed Strategic Plans.

Abismael Abreu, MPA, *Strategic Initiatives Administrator*

City of St. Cloud

1300 9th Street

St. Cloud, Florida 34769

P: 407-957-8445 | **C:** 407-813-3236

Abismael.abreu@stcloudfl.gov

Project: 2024 Community Strategic Plan (the first one for the community)

Process: The first strategic plan for the City of St. Cloud, a community of over 60,000 near Orlando that has immense growth and a large geographical base. With a community survey, significant public engagement, several Council and staff retreats and meetings as part of the methodology, there were three main deliverables: a new Strategic Plan, an Implementation Plan and a set of City Values.

Outcomes: The Council approved the strategic plan unanimously and the implementation work is underway with regular meetings structured around updates. The budget was aligned with the strategic plan, allowing for new positions to be created, and funded to support the work.

<https://www.stcloudfl.gov/1974/Citys-Strategic-Plan>

Marcus Thorne, Project Manager

ReCAST Lawrenceville/City of Lawrenceville

70 South Clayton Street

Lawrenceville, Georgia 30046

Marcus.thorne@lawrencevillega.org

[\(678\) 407-6653](tel:6784076653)

Project: 2022 - 2023 Community Needs Resource Assessment (CNRA) and Strategic Plan for ReCAST Lawrenceville federal grant.'

Process: Intensive and robust community outreach and engagement focused on at risk youth and families to include personal interviews, community open houses, presentations at partners and nonprofits, surveys including youth surveys, sticky notes, dry erase boards and other inclusive methods culminating in a three-day strategic and implementation planning session.

Outcomes: Federally approved grant for the CNRA and Strategic Plan; focused alignment and direction for the Advisory Group; ongoing implementation direction for staff. Full support from the City Council.

<https://www.lawrencevillega.org/621/About-ReCAST>



Val Covey, County Commissioner

Williamson County Texas Precinct 3

100 Wilco Way, Suite CO 201

Georgetown, TX 78626

Ph: 512-943-3370

Comm3@wilco.org

Project: 2023 (and ongoing) Comprehensive 10-year strategic plan for Williamson County incorporating all 1800 employees, 35 elected officials and 25 department heads. This was the first ever strategic plan for the County.

Process: Utilizing survey of internal and external stakeholders, confidential interviews, multiple focus groups, a Commissioners session, and a leadership strategic planning retreat, we created a strategic plan that supports the Vision and Mission of Williamson County. The Key Goal teams met in a series of implementation meetings to craft the Implementation Plan, and the team agreed to a reporting tool and updating process that is guided by ongoing facilitation work from SBrand Solutions.

Outcomes: Based on the strategic plan, the County hired a new County Administrator, focused their budget conversations around the Plan goals, and created an inter departmental (elected and appointed) team to manage the implementation plan.

<https://www.wilcotx.gov/1146/Strategic-Plan>

Josh Rydell, City Commissioner

City of Coconut Creek

4800 West Copans Road

Coconut Creek, Florida, 33063

jrydell@coconutcreek.net

(954) 973-6770

Project: 2021 Updating Vision 2020 to Vision 2030

Process: Significant and extensive community engagement process utilizing surveys, interviews, social media, website creation, white boards, sticky notes, Advisory Group meetings, community meetings, Department Head meetings, graphic recorder, presentation to community stakeholders, event attendance and public meetings.

Outcomes: Strong community engagement (highest attendance at virtual meetings), education about City responsibilities and accountability, graphic community vision.

<https://www.coconutcreek.net/community-relations/vision-2030>

If you would like to see even more examples of our strategic plans for libraries and other agencies, as well as examples of our community engagement work, please click [this link to the full Google Drive of relevant projects.](#)



City Staff Assistance

SBrand Solutions provides a full level of personal and administrative support to complete the project. The anticipated time and resource commitment from your team would include attendance at a weekly meeting (to give guidance), creating contact information, support selecting and/or reserving meeting space, sharing important documents and information, reviews of draft and final documents and participation in facilitated meetings.

Description of the Approach

The timeline presented in the RFP allowed a full fifteen (15 months) for the strategic plan process, so our proposal aligns with that timeframe, but we do feel it would be possible to complete earlier, even with a very robust and widespread community engagement process. We have a unique perspective on creating the assessment and strategic plan, a deep understanding of the issues facing communities across America, and a proven ability to design facilitated meetings that drive outcomes. Coupled with our expertise in facilitation, we bring an expert level of skill to our work.





Our work is not created in a vacuum by us, rather we will work in a collaborative partnership with the City, staff, and stakeholders to collaborate on an actionable strategic plan to help guide policy priorities and budget allocations into the future. For example, while we will recommend a framework for a community plan, we would want to get input and feedback from staff, stakeholders and most importantly, representatives from the segments of the community that may not have participated or been heard from at the same levels as other segments. It's important to reach out to people in ways that make them feel included, that feel comfortable to them, and that they can easily access and engage with to get the best feedback.

The foundation of SBrand's proven approaches to strategic plan development rests on the following guiding principles:

- ✓ **Customized**
- ✓ **Participatory**
- ✓ **Aligned and Integrated**
- ✓ **Flexible and Adaptable**
- ✓ **Owners and Champions**
- ✓ **Proven Impact**
- ✓ **Accountability for Implementation**
- ✓ **Measurements of Success**
- ✓ **Reviewed and Updated**
- ✓ **Easy to Communicate**

Fees and Expenses: Tasks, Timelines, Phases and Costs

Below please find our proposal, in a "menu" format. We find that the best results happen when we collaborate with you to design a final approach – so some of these options may be great ideas from our perspective but may not work as well based on your real-life experiences and knowledge, as well as the community needs and expectations.

City of Novi

Facilitation of Community Strategic Planning Process

Phases, Tasks, and Timing



Includes all supplies needed for meetings, creation of any/all materials, graphic design and other elements
SBrand invoices for these services monthly for tasks completed during the month.

Phases and Tasks		Deliverables	Proposed Dates	Proposed Cost
Phase 1 - Logistics, Project Management and Foundation			March and ongoing	
Task 1 1	Kickoff and Logistics Meeting (virtual) - 2 hour meeting	Logistics meeting to review framework, process, milestones and deliverables (with the Long Range Strategic Planning Committee)	Week of March 3, 2025	\$ 750.00
Task 1 2	Weekly planning meetings (virtual) with Working Group	Weekly for six months, for updates, feedback, course correction (with the Long Range Strategic Planning Committee)	Ongoing	\$ 3,600.00
Task 1 3	Monthly update meetings	With the Steering Committee (virtual and in person)	Ongoing	\$ 1,500.00
Task 1 4	Creation of Project Management Plan	Timeline, dates, specific projects and details	By March 17, 2024	Included
Task 1 5	Develop a Communication Plan	To include recommendations for tasks, dates, and ownership of social media, graphics, handouts, documents, engagement techniques, events, postcards, school surveys and more	By March 24	Included
Task 1 6	Ongoing calls and emails for life of the project		Ongoing	Included
Phase 1 Investment: Approved project management plan and ongoing communication				\$ 5,850.00
Phase 2 - Research and Review			March 2025 - March 2026	
Task 2 1	Review all related documents	Land Use Master Plan, Parks Master Plan, Fire Master Plan, past plans, etc.	Ongoing	Included
Task 2 2	Review all local, regional and state documents		Ongoing	Included
Task 2 3	Research and compile demographic and other statistical data and information	Demographic, environmental, trends, economic data	Ongoing	Included
Phase 2 Investment: Full review of all documentation and research of materials				\$ -
Phase 3 - Outreach and Engagement			May 2025- Early November 2025	
Task 3 1	Recommend best practices and set up recruitment for Steering Committee	Includes creation of a Steering Committee handout, document and other materials to assist Examples: Leaders in the community in specific areas, chairs of volunteer commissions/boards, agencies that serve underrepresented voices in the community, youth organizations, educational institutions	By March 24, 2025	Included
Task 3 2	Recommended partners for engagement	Examples: Elected officials, department heads, key employees, community stakeholders, and partners		Included
Task 3 3	Recommended list of individual interviewees	Example: Business owners, other governmental agencies, service groups, nonprofit agencies, economic development partners, Chambers of Commerce, school district, youth groups, senior groups, non English speaking, faith based		Included
Task 3 4	Recommended list of groups for outreach	Generate ideas, conduct a "contest", recommend tag lines for adoption		Included
Option 3	Create a tag line for Novi 2050	Based on the tag line and the vision, create 3 logos for consideration for Novi 2050		\$ 500.00
Option 3	Design a logo for Novi 2050	Four separate surveys: internal for staff, external for general community, external for youth (or other specific outreach needs) and external for stakeholders		\$ 1,500.00
Task 3 5	Create draft and final survey questions for approval	Curating and designing questions specific to the interviewees		\$ 2,000.00
Task 3 6	Create draft and final interview questions for approval	For each focus group, designing questions to engage and receive the best feedback		\$ 500.00
Task 3 7	Create draft and final focus group questions for approval	Estimated based on proposal, can be customized to your needs. Includes website, social media design, handouts, attendance at events, presentations to community groups, formal articles or press releases		\$ 12,000.00
Task 3 8	Implementation of the engagement and communication plan	Five specific focus group meetings, 2 hours each, in person		\$ 7,500.00
Task 3 9	Community focus group meetings	Specific Focus Group for previous elected officials, 2 hours in person		\$ 1,500.00
Task 3 10	Previous Elected Officials Workshop	Workshop for the current Board, 2 hours in person		\$ 1,500.00
Task 3 11	Current Board Workshop	Three focus group meetings for employees, 2 hours each in person		\$ 4,500.00
Task 3 12	Employee Focus Groups	Surveys monitored with customized questions		\$ 500.00
Task 3 13	Online surveys released and monitored	30 personal interviews, 1 hour+ each		\$ 6,000.00
Task 3 14	Confidential personal interviews	Anticipate 10 presentations, one hour each, will include feedback and engagement options (Rotary, School Board, volunteer Boards or Commissions, etc)		Included
Task 3 15	Presentations to Boards, Commissions, Community Groups and others as needed	Engagement Report with themes, priorities, and areas of concern		Included
Task 3 16	Full report of engagement data: interviews, surveys, community meetings, and focus groups			\$ 36,500.00
Phase 3 Investment: Engagement, Facilitated Meetings, Survey, Interviews, Feedback Report				
Phase 4 - Facilitate the strategic planning process			January - March 2026	
Task 4 1	Community Visioning Session	In person, with a graphic facilitator to create a vision	Mid January, 2026	\$ 10,000.00
Task 4 2	Community Values Listening Session	In person session, 4 hours	Mid January, 2026	\$ 3,500.00

Trip 1

Trip 2

Trip 2

Task	4	3	Two day retreat to complete all the details of the Strategic Plan	Two full day meetings (6-8 hours) with the Council, Steering Committee, key staff and others as desired	Early February, 2026	\$	18,000.00	Trip 3
Task	4	4	Leadership meetings (based on Priorities or Goals) to complete the Implementation Matrix	Half Day Meeting (4 hours) to created the Implementation Plan with internal leadership team	Early March, 2026	\$	3,500.00	Trip 4
Phase 4 Investment: Facilitated Strategic Plan and Implementation Plan meetings and staff feedback meeting							\$ 35,000.00	
Phase 5 - Create and Review Documents					April - May 2026			
Task	5	1	Strategic Plan Framework Draft	Draft document	By March 31, 2026	\$	2,500.00	
Task	5	2	Community Meeting to Review Draft	1 hour meeting, in person to review draft	Early April, 2026	\$	750.00	Trip 5
Task	5	3	Council Work Session to Review Draft	2 hour meeting to review the draft and gather improvements, in person	April, 2026	\$	750.00	Trip 5
Task	5	4	Strategic Plan Revision #1	Up to three revisions based on feedback (typos and minor revisions included at any time, no cost)	Month of April	Included		
Task	5	5	Strategic Plan Final	Final strategic plan for consideration	Late April, 2026	Included		
Task	5	6	Summary Strategic Plan	Strategic Plan handout with high level summary	May, 2026	\$	500.00	
Task	5	7	Recommended Measurements	Additional measurements to consider implementing over time	May, 2026	Included		
Task	5	8	Recommended Dashboard	Recommendations for dashboard content and creation	May, 2026	Included*		
Task	5	9	Implementation Matrix and Plan	Final matrix with roles, responsibilities, milestones and metrics	May, 2026	\$	1,250.00	
Task	5	10	Executive Summary with Recommendations	Executive Summary of Process and Recommendations	May, 2026	Included		
Task	5	11	Create templates for ongoing evaluation and updates	Create templates and ensure process is in place for review, update and communication about the plan moving forward	May, 2026			
Task	5	12	Present Plan for Adoption	In Person Presentation	May, 2026	\$	500.00	Trip 6
Phase 5 Investment: Strategic Plan, Implementation Plan, Measurement Documents, and Report/Update Documents							\$ 6,250.00	
Total Project Cost						\$	83,600.00	
Travel to be billed at cost						\$	7,500.00	
Total Not to Exceed Cost						\$	91,100.00	

*a dashboard can take many forms (Power BI, purchased software) and we would want to recommend the best approach after we have more information)

Recommended Ongoing Support for Implementation and Integration

Includes Templates, Training and Integration	Does not include travel, does include supplies	Pricing
Monthly conference calls, customized templates	Monthly video conference, written templates, all emails and phone calls. individual and team support	Included
Quarterly Review and Update Meeting	Meetings to update the Implementation Plan	\$3,500.00
Quarterly Review and Update Meeting	Meetings to update the Implementation Plan	\$3,500.00
Quarterly Review and Update Meeting	Meetings to update the Implementation Plan	\$3,500.00
Quarterly Review and Update Meeting	Meetings to update the Implementation Plan	\$3,500.00
Updates to Strategic Plan and Implementation	Updates and presentation of the plan	\$500.00
Deliverable: Full Year of Ongoing Support and Implementation Meetings		\$14,500.00

Scope of Work: Services and Methodology

The attached spreadsheet lists key project milestones, broken into five (5) phases of work. An easy way to think about milestones within the project is to think about the four key questions that the process will answer:

Where are we now?
Where are we going?
How will we get there?
How will we know if we are successful?



Our methodology: Through a customized facilitation process, we engage with stakeholders that have diverse backgrounds, unique perspectives, cultural differences, and divergent views of the future to create alignment using shared values and consensus on the vision for the future. Such input drives the development of an actionable, realistic strategic plan with measurable outcomes.

The **five main phases to our methodology:**

- **Phase 1:** Design and launch the project plan based on a customized process.
- **Phase 2:** Research, review and analyze documents including budget, master plans, current strategic plans, regional plans, documents, and other policies.
- **Phase 3:** Outreach to and engage with the community, the County, stakeholders, and staff.
- **Phase 4:** Facilitate listening and planning sessions and implementation meetings.
- **Phase 5:** Based on the assessment, create the Strategic Plan and Implementation Plan documents. This vital phase will make certain that your strategic planning and implementation documents are actionable, realistic and have measurable short and long-term objectives. Additionally, we will create templates for ongoing updates and a reporting structure to keep the plan a living document.



We adapt our approach to each client: We believe in meeting our clients where they are, offering advice and ideas, giving guidance and strong recommendations when needed, and ensuring ongoing sustainability through templates and actionable support.

About Virtual Meetings

We do prefer to meet with you in person but absolutely understand health and budgetary concerns may require virtual facilitation. As professional facilitators, we know how to create a great and seamless facilitated meeting, whether in-person or virtual. Over the years, we have found that virtual meetings are as complex and complicated and take even more planning than in-person meetings.

We staff ALL our virtual meetings with a minimum of two certified facilitators as standard practice, ensuring a fluid and supported environment. We offer the latest in collaborative online tools, with engaging content that is active and participatory and not only substitutes for in person collaboration but matches it. We also mail a packet to all participants for a virtual meeting that is designed to be engaging, practical and fun.

Phase One: Project Kickoff, Research and Review

The kickoff meeting will cover overall logistics and our weekly updates, phone calls and emails will continuously guide the overall project. This interface is the key to building our relationship and charting the course of the project. We will review and determine all the details about the schedule, process and deliverables and discuss the specifics of interviews, workshops/focus groups, document review, dates, and other logistics.

We recommend a weekly check-in video conference throughout the process and all phone calls and emails throughout the life of the project are included at no charge in our proposal. This allows us to update your team regularly, get feedback, address any questions, and make any changes or course corrections immediately during the process. These calls serve as a vital part of the communication mechanism we utilize to keep your team informed of progress, updates, and changes.

Phase Two: Research, Document Review

In this phase, we conduct all our document review and research to gain a deeper understanding of the culture and needs of the organization and community. We review all relevant documents, including the current recommendations, budgets, master plans, current and past strategic plans, regional plans, partners/stakeholders plans and more. Our research also includes community and regional demographics that affect strategic planning, best practices deployed by your peer communities in the state and partner plans that can potentially integrate with or leverage results for your current goals.



Phase Three: Engagement and Outreach

We realize that some engagement and outreach has already taken place, and we would also propose to conduct other opportunities including an employee survey, community wide survey, partner survey, personal interviews and focus groups to drive engagement and feedback. We will use the data gathered during our process (research data and meetings with the Steering Committee) as a baseline, which will inform some of the questions and approaches for engagement. Because we craft the questions for engagement very carefully, we can distill the responses into common themes, ideas, and concepts. Those concepts are incorporated into the design of the process in three ways:

- 1) The agenda, techniques, tools, and processes used during the strategic plan retreat meeting
- 2) The content and structure of the strategic planning document, implementation documents and reporting documents, and
- 3) The final report and recommendations created at the end of the process will identify key organizational short and long-term goals and objectives and fiscal constraints and opportunities to achieve those goals and objectives over the next two years.

Community Engagement and Communication Plan

A great community engagement plan benefits from a thoughtful, thorough design process so it can be as inclusive, broad, and deep as possible. With a March start, we will want to have at least a 7-month engagement process to cover the summer months and school sessions. Being nimble and adaptable is also key – we’ve found that as we reach out, we discover additional community members that should be involved in the feedback process. We start with a basic framework ([here are a few for your review](#) that become the basis for a deeper conversation with you and your community).

A good example of some deep community outreach was our work for [ReCAST Lawrenceville](#) and if you scroll down on that report to page 34, you can see the different types of outreach, especially to undocumented immigrants, youth and families who were non English speaking, and the homeless community. These are traditionally difficult individuals to reach, and building trust in a short period of time can be hard. We relied heavily on community contacts who already had established services and relationships and asked them to help us with the outreach, providing them with questions, supplies and tools. It was amazing!

The below covers the basic framework of our community engagement process, and we design and create the process as well as all of the supporting documents and tools



needed to conduct outreach. **Here are our initial recommendations for your community engagement process:**

Survey Process

The survey process is focused on community, stakeholder, and employee engagement, with specific questions focused on the future and strategic planning. We are recommending four separate surveys for this reason: one for partners/stakeholders, a second one for the wider range of community members, one for youth in the community and one for staff. We suggest a baseline of 3% of your community overall respond, but we also recommend we set some goals for specific representation from segments of your community such as youth, over 65, differently abled, or non-English speaking.

Focus Groups, Listening Sessions, and Workshops

Our focus groups are facilitated meetings where we engage participants in deeper conversations about current status, priorities for the future, trends, best practices, and opportunities. This engagement style allows participants to not only share their ideas but to listen to one another and create a dialogue that is iterative and builds connection and understanding. Based on our current understanding, we would recommend:

Five (5) general community focus groups to allow as many people as possible to attend.
One (1) focus group for former elected officials, after we have some survey data.
One (1) focus group for current elected officials, after we have some community data.
Three (3) staff focus groups.

Confidential Personal Interviews

The personal interviews are intended to provide additional in-depth insight and allow interviewees to feel comfortable sharing information they might not otherwise. We would recommend thirty (30) interviews and will help guide that selection process.

Social Media Engagement

As a part of our work, we will create weekly [social media posts with graphics](#), photos and texts for City approval. Some will include video and will be created for all the platforms that the City might use (Facebook, Next Door, Website). This will include a graphic designer.

Website

We will design and create a web page (which we can host for the life of the project, or the City can host so it can be updated and maintained in perpetuity) for the process and the resulting plan documents. This will include a graphic designer.



Handouts

We will create a handout for the Steering Committee (recruitment if needed and a handout about the strategic planning process), a community facing handout about the strategic planning process and how to participate, postcards with questions (to handwrite) and QR codes (to go to survey on line) and other documents as needed to promote participation and feedback. These documents will be translated into any languages necessary. We've found handouts sent home with school aged community members can be targeted to age groups (one for the school parent, one for the school child). This will include a graphic designer.

Attendance at Community Events

Face to face conversations always work well when gathering data. With the City's help, we will map out a calendar of significant community events and determine what capture methods will work best: a postcard to take home, a QR code to take the survey on the spot, a handout, sticky notes, a dry erase board or other tools needed to gather data. We will make every effort to coordinate our planned trips to coincide with the events so that we can be there in person, up to 5 events over the project.

Presentation to Community Groups

All communities have groups of people who gather on a regular basis, and could include school boards, Rotary or other service organizations, nonprofit boards, volunteer boards and commissions of the City, Chambers of Commerce and others. We will be happy to do short in person (or virtual if the meeting is virtual) presentations to drive understanding and participation in the process.

Formal Press Releases or Newsletter Articles

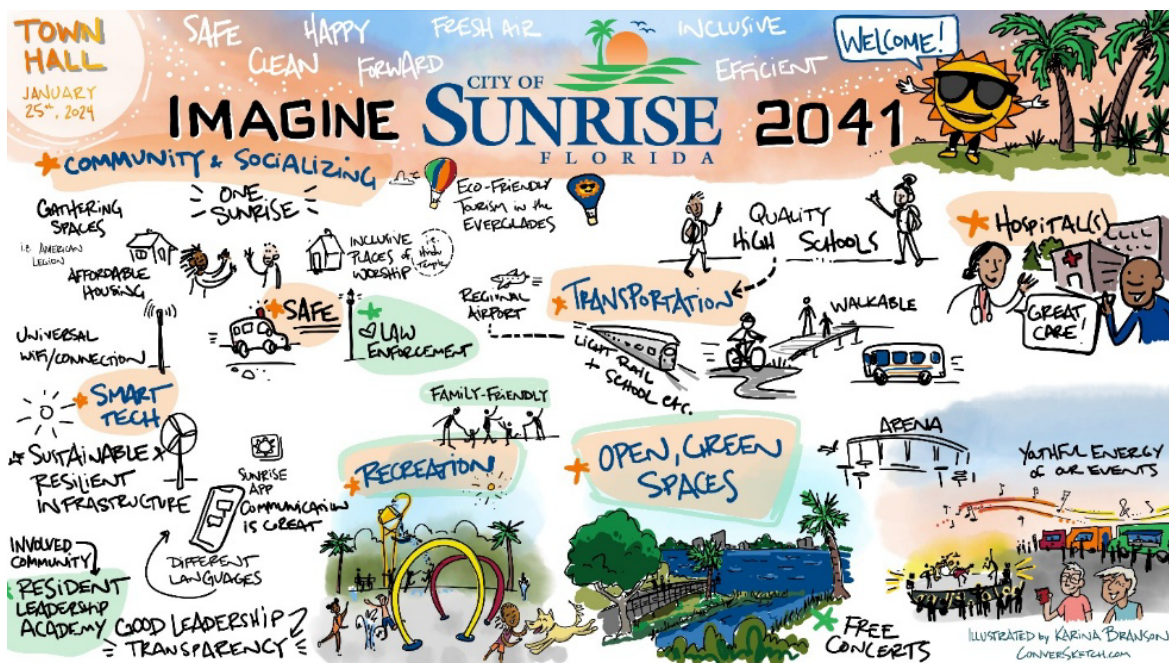
We will draft and finalize up to 10 formal press releases or newsletter articles for the community about the plan. While this often doesn't drive engagement, it will reach a segment of the community that reads online or hard copy materials.

Option: Unique Engagement Tools

With strategic planning outreach, we often use unique engagement tools to reach segments of your community where we need to customize questions or engagement styles. We have implemented **sticky notes** for local nonprofits who work within the community, **brochures** with QR codes for faith-based organizations to hand out, and **dry erase boards** for various organizations such as libraries, the YMCA, or local businesses. You can see some specific examples in [this Google Drive file](#).

Phase Four: Facilitate Strategic Plan and Implementation Roadmap

This is where our background shines! The facilitated meetings are the **heart** of our process and will be the foundation for the components of your strategic plan. Our proposal outlines a series of facilitated meetings over the course of the project. The meetings are designed to build understanding, create support for the goals and priorities, and engage the team in the implementation and final decisions. Our methodology uses consensus and collaboration to guide the strategic plan. As Certified Master Facilitators® and Certified Virtual Facilitators™, we specialize in creating a meeting framework that is engaging, effective and creates the specific desired outcomes.



Community Visioning Session

We are recommending an in-person community session to begin the graphic vision for Novi 2050. Below is a recent example we created for a client over a series of community meetings, with final touches being added by the City Council. This is an amazing way to engage with the community and can be used digitally or the original 4 x 6 version to present to groups to gain more feedback.



Community Values Session

We have found that when values align (and there will be many shared values within the community), conversations about the future can then be guided and driven by the values of the community. We are recommending a community values session.

Note: the vision and values sessions usually happen AFTER the survey so that we have some data to craft the right questions and share information.

Strategic Plan Retreat

We are recommending a two-day retreat with the Council, Steering Committee, and key staff leadership as best practice. The retreat will allow time to have robust and deliberate conversations, fully understand context, discuss unanticipated consequences, and have a better picture of how to achieve the Vision for the future. Not only will teamwork and communication increase but retreat will be fun, engaging, and effective!

We will use all the information from our engagement and outreach phase to inform and guide the conversation around the Strategic Plan components including creating priorities, discussing potential short and long-term goals and objectives, and linking these strategic ideas practically to budget priorities and operational plans. The conversation will include how best to deploy, integrate, and update the plan seamlessly into the operations over the next two years and beyond.

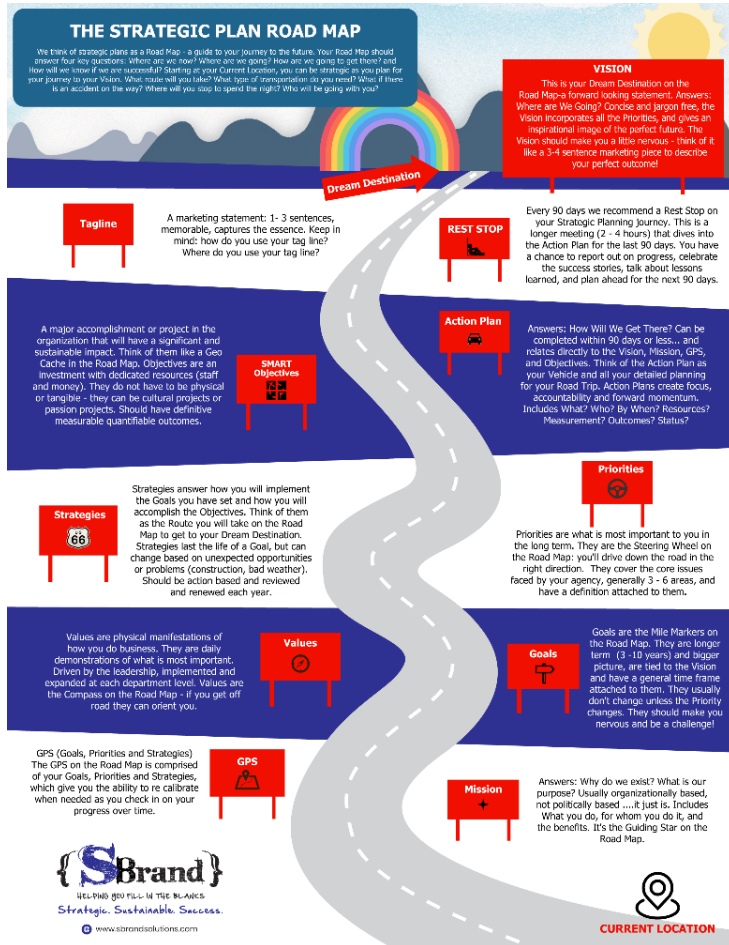
Implementation Roadmap Meeting

In our experience, the group that is often overlooked as a part of the strategic plan process are the employees who implement the plan. We are recommending a series of facilitated meetings to operationalize the policies and strategies from the retreat into an Implementation Plan. The **Implementation Plan** will be the actionable, realistic, “rubber meeting the road” part of the process and will include roles, dates, responsibilities, and resources—all of which will be aligned to the agency’s varied work programs. This detailed, tactical level conversation will take place in a separate meeting once the overarching strategic framework is near completion.

Phase Five: Create Strategic Plan and Implementation Plan Documents

The comprehensive **Strategic Plan** is the guiding document created from all our work. This is your *framework*, your *road map*, your *guide* to the future of the organization, and the *key* to measuring your successes. Our plans are customized to our clients but there are components to any Strategic Plan that are critical to long-term success.

Every great strategic plan will include at least the following components:



- ✓ Vision
- ✓ Mission
- ✓ Core Values and Guiding Principles
- ✓ Priorities/Pillars/Key Areas of Focus
- ✓ Strategic Goals and Outcomes
- ✓ SWOT analysis
- ✓ Initiatives and Projects
- ✓ SMART Objectives
- ✓ Key Performance Indicators or Measurements
- ✓ Critical Success Factors
- ✓ Adaptive Strategies

The **Strategic Plan** and **Implementation Plan** together form the roadmap to guide the team into the future.



The **Implementation Plan** is the tactical and operations side – the “how do we get it done” document. It includes:

- ✓ **Framework for introduction of Performance Measures**
- ✓ **Specific Action Steps**
- ✓ **Owner**
- ✓ **Due Date**
- ✓ **Occurrence**
- ✓ **Resources**
- ✓ **Measurables and Performance Metrics**
- ✓ **Current Status / Evaluation / Updating the Plan**

Summary

Thank you for your consideration of our services! We appreciate and value your time and we are confident that our collaborative and inclusive approach will successfully achieve your outcomes. We look forward to collaborating with you and are happy to provide any additional information or resources that might be helpful to you in your consideration of our proposal.

Appendices

Sheryl Trent Resume
Zach Ratkai Resume
Mitzi Rapkin Resume
Strategic Planning Philosophy
Facilitation Philosophy



Sheryl Trent

(970) 208-6633
sheryl@sbrandsolutions.com
2850 SW 50th Terrace, Cape Coral, Florida 33914
www.sbrandsolutions.com

summary of qualifications

- 28+ years of experience in public and non profit sector leadership and management
- A Certified Master Facilitator®, one of fewer than 40 in the world
- Expert at facilitating complex and confrontational topics in a manner that makes them easy to understand and allows consensus to be built
- Executive team development and team building with both Strengthsfinder and DiSC process.
- Customized methodology and deliverables that build capacity and enhance shared values and vision
- Proven success and long term results across the country
- Unique inclusive community engagement design and tools
- Experienced virtual facilitator for large and small meetings using multiple platforms
- Hundreds of successful, comprehensive strategic plans for cities, counties, state organizations, federal agencies, special districts, non profits and membership organizations
- A Certified Virtual Facilitator
- Certified by Cornell in Diversity and Inclusion
- Created over 100 strategic plans for local governments (city, county, state, and federal agencies)

professional management and leadership experience

since 2011

OWNER, SBrand Solutions, LLC

prior

**COMMUNITY AND ECONOMIC
DEVELOPMENT DIRECTOR**

City of Evans, Colorado

EXECUTIVE DIRECTOR

Evans Redevelopment Agency

TOWN ADMINISTRATOR

Town of Milliken, Colorado

**COMMUNITY DEVELOPMENT DIRECTOR
(ACTING)/ ECONOMIC DEVELOPMENT
MANAGER**

City of Grand Junction, Colorado

INVESTMENT REPRESENTATIVE

Edward Jones Investments, Yreka, California

COUNTY ADMINISTRATOR

(ACTING)/ASSISTANT COUNTY ADMINISTRATOR

County of Siskiyou, Yreka, California

ASSISTANT TO THE CITY ADMINISTRATOR

City of Santa Paula, Santa Paula, California

ASSISTANT TO THE CITY MANAGER/INTERN

City of Federal Way, Federal Way, Washington



past and present

education

- BA Political Science, University of Washington
- MPA Public Administration, University of Washington
- Certified Master Facilitator®
- Certified Virtual Facilitator™
- Rocky Mountain Leadership Program
- Grand Junction Area Chamber of Commerce Leadership Program
- Credentialed Manager with ICMA
- Certified Life Coach
- Consistent ongoing training and coursework
- Certified in Diversity, Equity and Inclusion, Cornell University

professional affiliations

- ICMA Member
- CCCMA Member
- INIFAC Board Member
- ICSC Member, Government Relations
- IEDCC Member
- Downtown Colorado Member
- Strategic Planning Member Association
- Small Business Development Center Board Member
- Leadership Council, Upstate Colorado
- Adjunct Faculty, Front Range Community College
- Strategic Planning Member Association and
- National Coalition for Dialogue and Deliberation Member
- Chair, International Institute for Facilitation

highlights

- Facilitates the creation of customized strategic plans for public and non profit clients that build capacity, inspire action, ensure accountability, and focus on results.
- Creates fun and engaging team building retreats that increase communication and results in forward momentum and alignment.
- Cultivates curiosity that drives learning and listening through shared values.
- Designs specialized training (in person, manuals and videos) for facilitation skills, strategic planning, Board development and team building.
- Negotiates and administers contracts and agreements with public and private partners that have resulted in multi million dollar capital projects, grants for both capital and planning projects, and agreements for development and sharing of new revenue.
- Leads multi-functional teams to develop new strategies, adopt controversial plans with support and consensus, create new investments and capital projects, and involve a wide range of affected parties.
- Establishes working groups of stakeholders that successfully collaborate to drive implementation, forward momentum and accountability.
- Speaks at keynote engagements on how to effectively facilitate meetings and implement strategic plans.
- Offers sought after on line training for strategic planning and board development at www.sbrandsolutions.com

N. ZACH RATKAI



1876 Nova Lane Richland, WA | 303.594.9569 | Zach@SagelandStrategic.com

Leadership | Innovation | Authenticity | Accountability

CORE COMPETENCIES & AREAS OF EXPERTISE

Economic Development
Land Use Management
Policy Development & Implementation
Budget Management

Strategic Planning
Organizational Assessment
Process Improvement
Community Engagement

Leadership & Team Building
Disaster Response & Recovery
Political Lobbying
Business Development

PROFESSIONAL EXPERIENCE

SAGELAND STRATEGIC LLC

December 2019 to Current | Principal

Consulting firm specializing in strategic planning, organizational assessments, and professional development for local governments, non-profits, and businesses. Services include career coaching for government professionals, meeting facilitation, decision-making support, retreats, and community engagement to enhance organizational effectiveness. Experience working with over 13 public sector agencies across the U.S. to develop strategic plans, conduct organizational assessments, and facilitate productive discussions and workshops, all aimed at helping clients achieve their missions and improve community impact.

BENTON-FRANKLIN COUNCIL OF GOVERNMENTS (Richland, WA)

May 2023 to Current | Local Government Programs Director

Directs local government programs and the Federal Economic Development District for BFCOG. As part of the Leadership Team, managed organizational development, economic and community development programs, and compliance with oversight agency requirements. Oversaw regional economic development, including the Benton-Franklin Economic Development District and collaborated with MPO/RTPO staff on planning functions. Led the creation and revision of the Community Economic Development Strategy (CEDS), aligning regional goals for federal funding. Managed the administration of the EDA Partner Planning Grant (\$450,000) and ARPA funding (\$400,000) for staff and community programs. Provided supervisory support to program staff and advisory committees

CITY OF PASCO, WASHINGTON

September 2018 to May 2023 | Administrative and Community Services Director

Directed the activities of the Administrative and Community Services Department. Responsible for the development, recommendation, and implementation of policies, programs, and procedures that accomplish the goals and objectives of the department which includes the following divisions: Information Technology, Facilities, Recreation, Municipal Court (Indigent defense), and the City Clerk in addition to assigned special projects consisting of real estate asset sales and purchasing, facilitation of future bond initiative election for the development of a regional aquatic center, as well as the re-development of the region-wide animal shelter. Responsible for an \$8.4 million general fund budget, a capital improvement budget totaling \$17.6 million for 2020.

CITY OF RICHLAND, WASHINGTON

February 2016 to September 2018 Economic Development Manager (June 2016 to Present) | Redevelopment Project Manager (February 2016 to June 2016)

Managed economic development projects aligned with City Council's strategic goals, focusing on business outreach and recruitment for over 2,100 acres of industrial/commercial land in Richland, WA. Developed retention and attraction strategies targeting job creation, retail growth, and small business support, overseeing a \$12.9M Industrial Development Fund. Supervised a two-person team, coordinating with public works and administrative staff. Served as media liaison for city initiatives, promoting business growth, and led revitalization projects for Downtown and waterfront areas. Represented the Uptown and Parkway Business Improvement Districts, managing planning, design, and budget for local development efforts.

CITY OF EVANS, COLORADO

January 2012 – February 2016 Flood Recovery Manager – Appointed (March 2015 to February 2016) | Community Development Manager (Jan 2013 to February 2016) | Building and Neighborhood Services Manager (Jan 2012 to Jan 2013)

Managed all aspects of the City's comprehensive planning, zoning, growth management, and code administration, including staff supervision (5 employees), contract and budget management, and consulting oversight. Led updates to building and zoning codes and coordinated with Federal, State, and local agencies. Supervised recovery operations from the 2013 floods, including grant acquisition and overseeing \$20 million in reconstruction projects, such as Riverside Park. Facilitated inter-governmental outreach, worked with the Governor's Disaster Resiliency Panel, and maintained relationships with state and federal delegations for legislative and recovery efforts.

TOWN OF SEVERANCE, COLORADO

January 2008 – December 2011 | Town Planner

Management of town historical development information and GIS data. Initiated state-required comprehensive Plan update including a complete overhaul of town land use codes to a form based development regulation document. Assist Town Manager with parks irrigation, personnel matters and finance. Public Information Officer, in charge of emergency notification and community involvement. Town representative for the North Front Range MPO and Upstate Colorado Economic Development.

CITY OF LOVELAND, COLORADO

May 2004 – December 2007 | City Planner I

Project management for current planning review. Coordination of development review team for subdivision review, residential PUD, special use review, annexation, rezoning, architectural/landscape review and field inspection. Project manager for development review software implementation (2007)

EDUCATION

Master of Arts in Public Administration (2014)
Graduate Certificate in Public Management (2012)
Bachelor of Arts in Applied Geography (2004)

University of Colorado
University of Colorado
University of Northern Colorado



Mitzi-Jill Rapkin

STRATEGIC COMMUNICATIONS & FACILITATION PROFESSIONAL

my philosophy

- Strategic planning aligns with organizational values & mission
- Daily work supports long-term organizational goals
- Employees are stakeholders in organization's success
- Internal & external partnerships strengthen organization & outcomes
- Creative thinking pushes innovation & leads to better solutions
- Visionary leadership inspires stakeholder participation
- Communications is transparent and customer service focused
- Collaboration is the foundation of success

executive profile

- Communications professional with proven track record in developing strategic & tactical plans
- Professionally trained and MG Rush Certified Structured Facilitator
- New Ventures West Certified Integral Coach
- IAP2 Certified in Public Participation and Engagement
- Proactively identifies potential problems & provides solutions
- Consistently provide creative ideas to push the communications agenda toward further success
- Deliver customer service and client focused solutions
- Unflinchingly loyal to mission of serving customers with transparent, effective communications
- Persistently evaluating status quo to develop better solutions & more successful outcomes
- Impeccable follow-through
- Strong collaborator with a knack for building partnerships & alliances
- Proponent of continued growth & self-evaluation in order to access excel
- Rise to challenges & produce under pressure
- Highly adaptive & quickly integrates new knowledge to further personal & organizational goals
- Strong balance of left brain critical thinking, logic, & reasoning paired with right brain creativity & imagination

education

MFA Creative Writing | 2016

Warren Wilson College

MS Journalism | 2001

Northwestern University - Medill School of Journalism

BA English & Religion | 1990

Indiana University

Mitzi-Jill Rapkin

STRATEGIC COMMUNICATIONS & FACILITATION PROFESSIONAL

leadership & communications

communications manager

City of Aspen | 2005-2007 & 2011 - present

strategic thinking

- Design and implement City of Aspen's strategic & tactical communications efforts
- Advise city leadership on alignment between policy & communications
- Develop and write communication plans for regular workplan, special projects, & crisis situations
- Communicate organizational vision & policies to community via multi-media outlets
- Create & execute media strategies
- Design & lead citywide training on writing, storytelling, media relations, & engagement strategies

fostering community

- Partner with leadership team to develop & carry-out vision of organization
- Build & cultivate stakeholder relationships within organization & with external partners & community
- Identify & understand the needs of key stakeholders to achieve shared goals
- Facilitate difficult conversations among groups with competing interests
- Design & implement community engagement strategies

execution

- Execute communications projects with focus on successful outcomes & quality product
- Write & edit external & internal collateral such as press releases, marketing materials, & election information
- Compose talking points for City leadership
- Manage & create organization's social media content
- Led project to rebrand City of Aspen, including overseeing project budget

accountability

- Track analytics across multiple platforms to assist with data-driven decisions
- Initiate adoption of new technologies to provide accountability & better organize communications
- Hire & oversee contract communicators, graphic designers, & photographers
- Track budgetary spending

other professional experience

Host & Producer

First Draft: A Dialogue on Writing | 2013 - present

Reporter/News Director

Aspen Public Radio | 2004-2005 & 2007-2011

Filmmaker

Fleisher Films | 2003 - 2004

National Geographic Television

Producer & Editor | 2001 - 2003

Backroads

Guide | 1994 - 2000



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STRATEGIC PLANNING PHILOSOPHY

CUSTOMIZED



While strategic planning process are very similar, each organization has a unique set of circumstances and culture. A customized approach includes asking the right questions of the right people at the right time and meeting everyone involved where they need to be. Creating opportunities for innovation, creativity and openness during the process is our passion.

PARTICIPATORY



We believe in open and welcoming engagement and outreach. "None of us is as smart as all of us" (Ken Blanchard) is something we often say to explain how diverse voices from internal and external participants can improve the content, understanding, and support for the plan. Those who implement the work in the strategic plan must be involved in the creation and development as well as take ownership roles in outcomes.

ALIGNED AND INTEGRATED



As the roadmap for the future of the organization, the plan strategic must be aligned with the budget and other long range or master plans. Every department strategic plan should also connect to and reflect the organization strategic plan.

FLEXIBLE AND ADAPTABLE



The old style of a linear plan that was created once every ten years based on current knowledge simply doesn't work anymore. Our plans are crafted based on current knowledge, foreseeable trends, potential barriers and challenges, and have as their backbone the ability to adapt and be flexible in times of change. Rigorous but not rigid is a guideline, and regular review and update helps keep the plan tied to reality yet changing with needs.

OWNERS AND CHAMPIONS



The plan will only be successful if there is ownership for the outcomes. A champion for the plan (such as a key staff member) will follow through on a review and update process, remind team members to update information, present reports to the leadership, and keep the plan alive and functioning at the highest level.



PROVEN IMPACT

We often hear, "I don't see a role for myself/my department in our old strategic plans." Through a customized participation process, we create ownership and understanding of how every role across the organization has a positive, provable impact on the future. That creates buy in and support for the plan, as well as alignment across the organization.



ACCOUNTABILITY FOR IMPLEMENTATION

A successful plan is a plan that is implemented, and a proven way to guarantee implementation is to create accountability. Using an Implementation Plan process, we ensure that accountability through participation and consensus on the next steps, agreement on the most important objectives and initiatives, and assigning an owner and team to that work.



MEASUREMENTS OF SUCCESS

Only with performance metrics can progress towards achieving goals be set, measured and celebrated. Important yet simple, easy to understand performance measures can be a communication tool externally and internally, with more specific measures of success within each department or division.



REVIEWED AND UPDATED

We leave you with a process and templates for regular review, reporting and updates. This demonstrable progress is a key to making the plan a living document. A regular review allows change and adaptability because consistent review and discussion are taking place at all levels in the organization.



EASY TO COMMUNICATE

The plan document should be created as a way to tell your story and give you a way to communicate clearly and easily what is most important to the organization. We create highly visual documents that capture the imagination and give the most important information in a clear and easy to read way.

WHAT IS FACILITATION?

Think about the biggest dilemma you're currently facing in your organization, the burning questions, the wicked problems, the frustrating issues that you just can't seem to get any traction around....

Now imagine what would it be like to involve your team and work together on the problem in such a way that new ideas emerge? What would it be like to gain new insight from your team's collective wisdom and have the issue you've been stressing over evolve into a collaboratively built vision, the foundation of a solution, supported by your team who will be eager to begin the journey to success?

This is what facilitation does.

And yet, facilitation is an often misunderstood and confusing practice. As professional certified facilitators, we are experts in harnessing the power of participants, empowering individuals, teams, groups, organizations, and communities to create a future of their own making through engaging in intentional conversations. We serve as the guide to solve those wicked problems, resolve deep-seated conflicts, innovate, improve, and thrive.

Professional facilitation involves a process and design methodology. It is the practice of thoughtfully structuring and guiding conversations, dialogues, meetings, events, decision-making processes, and other activities using intentional strategies that help groups converse and collaborate more respectfully and productively. ("Facilitation Principle – Organizing Engagement") *Great facilitation is grounded in the practice of inclusivity, fairness, mutual respect, and shared decision-making.* Participants have the opportunity to listen to, debate and understand the differing perspectives in the room in a structured method that allows respectful consideration and strong consensus.

Facilitation is a skill set: professional certified facilitators have the experience, background, and training to help individuals with different values, beliefs, or cultural backgrounds listen to one another in constructive ways—rather than defaulting to argumentation or stereotyping—which can improve mutual understanding and appreciation for different points of view.

THE BENEFITS OF FACILITATION

The conversations that happen *in* meetings, not the meetings themselves, should be productive, meaningful, and effective. When we create the space for real, collaborative engagement, people do more than just show up for a

meeting. And the results and outcomes are much more than an agreement or a document. Facilitation has amazing impacts in areas such as

- Excitement for the meeting
- Members who are ready to participate and contribute.
- Support and buy in for the outcomes and decisions
- Understanding the process of how the decision was made.
- Improved team morale
- Hearing diverse voices
- Positive working relationships
- Stronger communication
- Higher levels of trust and respect
- Critical thinking skills
- Accountability for the execution and follow through
- Inspiration and innovation
- The “Aha!” moment: Helping participants see things they have never noticed or understood before

The result is a process that participants feel is **inclusive, welcoming, fair, respectful, effective, engaging, fun and well worth their time**. Our facilitation experience has allowed us the honor to see immense change within teams, organization, and communities even in the most challenging of times and passionate of topics. We believe in the power of facilitation to change the current status and change the future in a lasting and positive way.

An additional benefit of working with a professional facilitator is that having someone NOT associated or employed by the organization will allow equity of input and draw out more candid conversations. With established teams, roles are already defined either formally or informally, which creates situations where comments from leaders are deferred to, and conversations can be stilted according to the professional relationships established. With a neutral third-party facilitator, everyone can participate in meetings and outcomes without having to stay within the confines of previously established roles and responsibilities.

OUR FACILITATION PHILOSOPHY

We strongly believe that “none of us is as smart as all of us” and that everyone has the innate ability to collaborate. We trust in the wisdom and abilities of people in the room. We know that when people share their ideas, they build on each other’s concepts, expand their own and each other’s thinking and create new ideas. We believe in applying the rules to everyone equally, treating all participants equitably, and being a behavioral role model.

HOW WE FACILITATE

We collaboratively and thoughtfully design rules and structure, frame topics and issues, pose the right questions, keep track of time, and record the main ideas or outcomes that emerge from a dialogue or process. When needed, we may

take a more active role to keep the discussion focused and moving forward or may intervene when problematic behaviors derail a discussion or compromise the emotional or physical safety of participants.

We provide structure, direction, and guidance to a dialogue or process. To accomplish this, we may ask challenging questions, provide background information, redirect unproductive arguments, request that speakers clarify unclear statements, and contribute in other ways. We use a variety of techniques to engage participants fully, overcome the challenges that might be in the room, and achieve consensus and sustainable success. We don't manage people, issue commands, control discussions, regulate opinions, or determine outcomes.

As facilitators, we want the outcome to derive from the participants within the process – that is, the process is not manipulated to arrive at an outcome that has been determined in advance by those in positions of power or authority. By applying rules to everyone equally, treating all participants equitably, and modeling, demonstrating, and explaining the behaviors expected of all participants, we help groups converse and collaborate more productively so that the eventual outcome—whatever it might be—results from a process that participants feel was inclusive, fair, respectful, and democratic. Our approach also creates buy-in which enables your participants to be the champions of implementation.

OUR FACILITATION PROCESS

In order to help people exercise their innate facilitative abilities, we create specific processes that support collaborative thinking, creativity, inclusivity, and curiosity. The processes are based on an understanding of the creative process, of human nature, of group dynamics and of the generative power of original questions. At time, the processes are simple and easy to apply but many times they are subtle adjustments that require experience, skills, and knowledge to be successful.

STEPS IN OUR FACILITATION PROCESS:

STEP ONE: SCOPE AND PLAN

Purpose

We need to know the “why” of the meeting before we can create the “how.” What is the purpose of this meeting? Why now? What is the intended outcome (a decision, a team building, action steps, creative or innovative ideas)? Is there a deliverable? Have there been past attempts to have these meetings and what was the result? What would be considered success?

People

Having the right people in the room is the most common barrier to success. We encourage a diverse and inclusive view of participants, again with the view that “none of us is as smart as all of us.” Based on our thousands of facilitated meetings, we often brainstorm with clients and help guide a conversation about the benefits and challenges of inviting participants. Once we know who will be attending, we recommend interviewing them prior to the meeting, or gaining some background knowledge of their approach and personalities.

Specific Outcomes of the Meeting

As facilitators, it's important that we know what would be considered a success, and what the priorities for the meeting might be. A question we ask is this, “Imagine for a moment that it is now the day after the meeting, and someone asks you about it: How did it go? Was it successful? You answer: ‘It was the best meeting I could have hoped for! We accomplished everything I wanted and more. I’m thrilled with the outcome.’ What would make you say that or react that way? What happened in the meeting that was so amazing? What did we as facilitators do or accomplish that made you so happy?”

Location and Room

The location of the meeting and the room have a significant effect on the meeting and the participants. Is there enough room to host the meeting? What kind of wall space is available? Are there breakout rooms? Where will food or breaks take place? Is there enough space for team building activities? What is the AV capacity? Are there access needs on the team to consider? Will the design of the room encourage engagement and feel welcoming?

STEP TWO: PREPARE THE PROCESS

Agenda

We collaboratively create an agenda based on all the information gathered in the first steps. The agenda has ground rules, specific topics, and time frames and outlines the tools and techniques that will be used to achieve the outcomes. We have found that the questions we craft, and how we craft

them, have the largest impact on the meeting. We anticipate potential problems, and we always have the ability to pivot and introduce a better tool or technique for the group if needed.

Collaborate on Questions

The design and creation, as well as the method of asking questions during a meeting is truly the difference between mediocre facilitation and amazing facilitation. Once we know the purpose, the people, and the product (outcomes) we collaboratively create the questions that need to be answered during the meeting.

STEP THREE: FACILITATE BASED ON OUR GUIDING PRINCIPLES

Set Up

The meeting room set up is the first thing participants see when they walk into the room. It is welcoming? It is comfortable? Is it inclusive? We pre-create our flip charts, butcher paper and handouts for the meetings prior. We arrive at least one hour early to ensure the AV functions; the room layout is as intended, and all of the materials and supplies are on the tables.

Facilitation

During the meeting we follow our Guiding Principles and the agenda. We make adjustments to time and topics as needed, and document the conversations, actions, and agreements of the group.

STEP FOUR: REPORT AND DOCUMENT

Based on our flip charts, sticky notes, online poll engagement, 3 x 5 cards, butcher paper and all the other methods we have to collect information, we create a report that is easy to read, graphically engaging, and captures the most salient points of the meeting. Having a formalized report shows a tangible result to meeting participants and enables them to continue the work from the meeting.

STEP FIVE: EVALUATE AND REFLECT

Evaluation and Feedback

This is an often-overlooked part of facilitation – to get feedback from the meeting participants. What went well? What was frustrating or confusing? What would they suggest as improvements for the next meeting? Not only is that feedback important for us as facilitators, but it can also help our clients realize how to host better meetings internally as well.

OUR GUIDING PRINCIPLES WHEN WE FACILITATE

PRINCIPLE: Establish a Welcoming, Inclusive and Safe Environment

Participants who feel confident, relaxed, and comfortable will speak up, share their ideas, and engage in potentially difficult or contentious conversations. We pay close attention to physical, emotional, and personal comfort. Choosing the location of the meeting, and even the specific layout of the room can contribute to the overall feeling of the conversation. Setting clear expectations using ground rules and setting the tone for a meeting can intentionally model the behaviors. We specifically demonstrate warmth, openness, curiosity, and a non-judgmental attitude toward all participants. We also monitor emotional cues and responses for signs that participants feel upset, anxious, threatened, or otherwise uncomfortable or distressed. There are several techniques we use to reestablish safety in a variety of ways, such as by calling a break, pulling a participant aside for a one-on-one conversation, or politely but firmly asking certain participants to refrain from making specific comments or engaging in harmful behaviors.

PRINCIPLE: Use an Intentional and Customized Process

We are intentional about creating the process to achieve the purpose of the group. Because we spend time understanding not only the outcomes but also the participants and the project, we craft deliberate and thoughtful exercises using techniques that are proven to work. We carefully craft unique questions that will generate engaged and thorough conversations.

PRINCIPLE: Build Facilitation Capacity within the Group

Because we believe in the innate ability of people, we want to build internal capacity within each organization for the future. Facilitation is a skill set, and we want to leave each team with the tools and techniques they can apply in the very next meeting.

PRINCIPLE: Be a Neutral Guide

As a neutral guide, we don't take sides. In fact, we practice intentional impartiality. We don't agree or disagree with any point of view. We are there to guide the conversation by asking the right questions at the right times and to document exactly what was said during the meeting. We know we are not the subject matter experts in the meeting, and our opinions are not important in a team meeting.

PRINCIPLE: Welcome the Differences

We welcome different points of view and perspectives into the meeting from the very first introduction. Although we do manage conflict and dysfunction, we know how to stay with conflict rather than changing the topic or moving away from the personal point of view when that is helpful to the overall group and not damaging to any participants. Creative, unexpected, and insightful ideas often happen after being able to fully voice opinions and uncomfortable issues.

PRINCIPLE: Share the Power, Honor the Wisdom, and Trust the Participants

We trust that the team has the wisdom and everything else it needs to solve its own problems creatively and innovatively. That means ownership for the participants and a sense of being included. The respect that we offer to the group is also a way to role model the respect we ask for within the meeting.

PRINCIPLE: Hold to the Intention of the Group

We respect the intention of the meeting by focusing on what would serve the team in the long run (based on our understanding of purpose and outcomes). Sometimes there may be resistance from the team about a decision or strong reluctance to move forward to another agenda item, which can mean that there is a topic that's difficult to discuss but needs to be talked about in order for the team to move forward, or it might have more to do with the team's dynamic than it does the topic at hand. We think that having the group struggle like this is beneficial to the process of decision making.

PRINCIPLE: 80/20

We believe that facilitation is at least 80% listening and capturing information. Perhaps 20% is setting the stage, holding to the time frames, enforcing the ground rules, and asking questions.

QUESTIONS WE ASK

We continuously ask ourselves, "How can I best serve the group?" and
"What does this group *really* need right now?"

OUR ROLE AS A FACILITATOR

While our role as professional facilitators changes for each client and adapts in order to achieve the outcomes and work with the unique participants, here are some of the core roles:

BEFORE THE MEETING

- To understand the purpose and intent of the meeting
- To understand the deliverables and outcomes
- To involve the right people and understand who those people are
- To customize the meeting design to the participants and the outcomes
- To understand how to structure a meeting to get results
- To have social and emotional intelligence

DURING THE MEETING

- To recognize the value of the group's time and use it to achieve the desired result
- To stay on time
- To keep the group focused and on target
- To have fun
- To remain unbiased and neutral
- To ask the right questions at the right time
- To be positive and encouraging
- To achieve understanding
- To reach consensus
- To develop next steps
- To listen to understand and listen to learn
- To document what each participant says
- To encourage full and inclusive input from every participant
- To create and maintain a safe and respectful environment
- To manage group dynamics including dysfunctional behavior
- To adapt to the needs of the group and be flexible

AFTER THE MEETING

- To provide documentation of issues, decisions, and actions
- To get feedback from the group on improvements and challenges
- To follow up on any next steps

CITY OF NOVI

PROPOSAL FOR: FACILITATION OF COMMUNITY
STRATEGIC PLANNING PROCESS

January 21, 2025



VERIDUS
GROUP



January 21, 2025

Mr. Victor Cardenas, City Manager
City of Novi
45175 Ten Mile Road
Novi, MI 48375

Re: City of Novi Request for Proposal for Facilitation of Community Strategic Planning Process

Mr. Cardenas,

Veridus Group, Inc. is pleased to submit our proposal in response to the City of Novi Request for Proposal (RFP) for the facilitation of the community's strategic planning process. Our team will leverage extensive experience in strategic planning and community development to support the Long-Range Strategic Planning Committee in developing a forward-looking vision for Novi 2025. By integrating data analysis with stakeholder and community engagement, we will facilitate the Novi 2050 strategic planning process and assist in the development of actionable goals to guide Novi's growth for the next several decades.

Our approach to the Novi 2050 Strategic Plan will comprehensively address the RFP's Scope of Services, including developing a detailed timeline with milestones, facilitating council visioning sessions, and forming a Steering Committee to guide the process. We will prioritize robust community engagement through innovative outreach methods, ensuring actionable, data-driven goals and a performance tracking framework. The final deliverable will be a clear, accessible strategic plan outlining Novi's vision, priorities, and implementation strategies, culminating in a presentation for adoption by the City Council.

At Veridus, we place a strong emphasis on **"People + Process"**. Our commitment to building relationships sets us apart from the competition. The word "Veridus" means "truth in representation." We strive to represent municipalities and communities faithfully in everything we do and believe we can bring value to your team.

To support this effort, our team is backed by the resources of our offices in Michigan, which provide proximity and additional support to our Indianapolis-based team. This presence ensures seamless collaboration and underscores our commitment to serving the City of Novi effectively.

Our team will be led by Jack Woods, Director of Community and Economic Development, who brings nearly a decade of experience in leading strategic planning efforts for towns, cities, and counties across Indiana. Jack will be supported by Director of Government Advisory, Pete Olson. As seasoned government consultant and former Town Manager, Pete will utilize over 20 years of experience to provide indispensable input that will specifically guide implementation strategies. Fulfilling the role of Project Analyst, Kody Leach will perform data analysis that informs decision-making processes and play a key role in the final design process of the strategic plan deliverable.

Thank you again for this opportunity and your consideration of the Veridus Community & Economic Development team.

Sincerely,

Tim Jensen, PE, LEED AP
President / Principal
Veridus Group, Inc.
C: 317-450-7653

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VERIDUS
GROUP

STATEMENT OF
Addendum

Statement of Addendum

We acknowledge receipt of Addendum #1 and Attachment A, provided via email on January 14, 2025, by Ms. Tracey Marzonie. Our team has thoroughly reviewed the materials and utilized the information to inform and shape our proposal. We confirm our agreement with the details outlined in the addendum and attachment.



VERIDUS
GROUP

QUALIFICATIONS AND Experience

Firm Background

ABOUT US



Veridus Group, Inc. was established in 2011 in Indianapolis, Indiana to address a critical gap in the construction industry: the need for a dedicated and true “Owner’s Representative.” Led by Tim Jensen, who brings over 20 years of expertise in real estate, development, and construction, Veridus has consistently focused on advocating for project owners. Tim’s diverse background as a real estate broker, developer, engineer, and construction manager—across projects ranging from hundreds of thousands to hundreds of millions of dollars—revealed that project owners were frequently the most overlooked and underutilized stakeholders. Under his leadership, Veridus has assembled a distinguished team of 35 professionals committed to representing project owners in every aspect of their projects.

OUR MISSION

*“To build better
communities through
great projects.”*



1,000+
contracted projects



\$3 billion
in managed project
costs



95+
communities served

Veridus Group, Inc. expanded beyond Owner’s Representation to include specialized teams in Civil / Site Engineering in 2014 and Community & Economic Development in 2017. This strategic transformation strengthens our ability to deliver greater value to the communities and businesses we serve.

Our **Community & Economic Development (CED) team** works on a broad array of economic development projects, serving as a trusted voice for governments and helping to add capacity and expertise where needed. *We equip counties, cities, towns, townships, and organizations with the relevant data to empower the decision-making process in their communities.*

We primarily service our projects from our office on the northeast side of Indianapolis. Additionally, we have regional offices in Evansville, Indiana, and in Byron Center, Traverse City, and Lansing, Michigan.



317-598-6647



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6280 N. Shadeland Ave.
Indianapolis, IN 46220

Relevant Experience

Our team offers decades of experience in community and economic development, specializing in helping municipalities capitalize on their unique assets and manage growth effectively. Below, we highlight relevant expertise in strategic planning for cities, towns, and counties. The following pages provide detailed narratives and references for four comparable projects to that of the City of Novi, demonstrating our proven ability to deliver customized, impactful solutions for our clients.



Steuben County Economic Development Strategic Plan: Steuben County, in partnership with Veridus, developed a comprehensive county-wide Strategic Economic Development Plan to guide the community's growth and decision-making over the next 5-10 years. This plan was informed by extensive economic research and robust stakeholder engagement, that employed a variety of tools.



Greencastle/DePauw College Community Connections Plan: Veridus was part of the planning team that created a downtown redevelopment plan for the City of Greencastle and DePauw University as part of the Lilly College Community Connections program. The Veridus team was responsible for illustrating residential and commercial market conditions, influencing future development opportunities.



Hancock County Corridor Plan: The Veridus team conducted a housing analysis and strategic plan for Hancock County, Indiana to address housing demand and affordability, particularly workforce housing. They also managed the READI regional development plan submission, securing significant funding, some of which may support workforce housing development.



Rockport Downtown Revitalization Plan: In Summer of 2024, Veridus completed a revitalization plan for Rockport, Indiana featuring assessments of assets, conditions, foundational documents, a SWOT analysis, and a housing study. Collaborating with the Downtown Revitalization Planning Committee (DRPC), the plan defines a vision for the next five to ten years with measurable goals and strategies for growth.



Lincoln Corridor Redevelopment Strategy: Veridus provided demographic, economic, retail, and housing analysis to inform New Haven's Lincoln Corridor Redevelopment Strategy. The team assisted KSM with stakeholder engagement meetings, facilitated focus groups, and identified business opportunities. Veridus also helped draft and present the final report to project leadership.



Speedway Economic Development Strategic Plan: Veridus partnered with the Town of Speedway, Indiana on an Economic Development Strategic Plan, prioritizing catalytic redevelopment projects like the Speedway Shopping Center and an innovation district. The plan highlighted corridor growth, community gateway enhancements, and featured "Big Ideas" such as the completed Town Center project in January 2022.



Town of Plainfield Economic Development Strategic Plan: Veridus partnered with the Town to create an Economic Development Strategic Plan, aiming to diversify industry sectors beyond logistics and distribution. The plan prioritizes talent, innovation, and business attraction, focusing on sectors such as autonomous technology and renewable energy to leverage the town's economic strengths.

Relevant Experience


01: STEUBEN COUNTY STRATEGIC ECONOMIC DEVELOPMENT PLAN

The Steuben County Economic Development Corporation (SCEDC), in partnership with Veridus, developed a comprehensive county-wide Strategic Economic Development Plan to guide the community's growth and decision-making over the next five to ten years. This plan was informed by extensive economic research and robust stakeholder engagement, involving interviews, focus groups, public meetings, and surveys that gathered input from over 200 participants. Veridus analyzed economic development, housing, demographic, and socio-economic trends to craft strategies tailored to the county's unique needs. Key focus areas include housing, talent attraction, business retention, infrastructure improvements, and alignment with local, regional, and state policies.

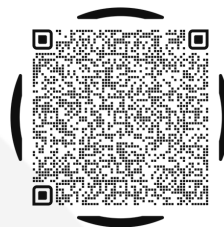
The final strategic plan provides actionable recommendations and a structured roadmap for future development and economic growth while addressing Steuben County's challenges, including slowing population growth and rural sustainability. By emphasizing collaboration and alignment with potential funding resources, the plan prioritizes initiatives such as housing development, workforce cultivation, and the preservation of natural assets. With a clear vision and practical implementation strategies, the plan equips the SCEDC to foster economic vitality, enhance quality of life, and position Steuben County for long-term prosperity.

REFERENCE

Isaac Lee, Executive Director, SCEDC

 260-665-6889

 isaac@steubenedc.com



Scan the QR Code for the full Steuben County Strategic Economic Development Plan.

Relevant Experience

02: WELLS COUNTY MASTER PLAN

In April 2024, Wells County selected Veridus to create a county-wide Master Plan with a budget of \$87,000, building on the recently completed Housing Study. This plan establishes a vision for future growth while leveraging Veridus' expertise in economic development and planning. It integrates existing efforts, such as the county's comprehensive plan and housing study, to define long-term goals and policies for land use, economic development, and sustainable growth.


A cornerstone of the Master Plan is its focus on five distinct sub-areas, representing the county's unique municipalities. Recognizing their varied population sizes, assets, and aspirations, the plan avoids a one-size-fits-all approach. Instead, it tailors strategies to meet the specific needs of each area. These targeted sub-area plans identify vision principles, goals, projects, and action items that align with county-wide objectives while honoring each community's individuality.

Public involvement has been vital, with community engagement and visioning meetings ensuring the plan reflects local aspirations. The result is a localized yet cohesive framework that fosters growth while empowering each municipality to achieve its goals.



REFERENCE

Michael Lautzenheiser, Jr.
Wells County Area Plan Commission
Executive Director

 260-824-6407

 GIS@wellscounty.org

Relevant Experience

03: YORKTOWN DOWNTOWN REDEVELOPMENT

Veridus collaborated with the Town of Yorktown to establish key vision principles that guided the project's direction, ensuring alignment with community values and aspirations. We led multiple public input sessions to engage stakeholders and gather meaningful feedback, fostering broad community support. Our team conducted thorough data analysis to inform decisions on space utilization and business recruitment strategies, tailoring recommendations to meet local needs. Additionally, we delivered multiple public presentations, maintaining transparency and providing clear pathways for implementation. Through the development of SMART (Specific, Measurable, Achievable, Relevant, Time-bound) goals, Veridus created a practical and actionable roadmap that has driven tangible results for Yorktown's downtown revitalization.

With the planning phase complete, Veridus facilitated developer negotiations and structured public-private partnerships that adhered to Yorktown's vision. The Veridus Owner's Representative team represented the town through the construction of each project, culminating in the successful completion of the town hall, Civic Green, and The Oliver. Currently, Veridus is supporting Yorktown in exploring further redevelopment opportunities around the town center and implementing financing strategies to boost local small businesses and entrepreneurship, including pursuing grant funding.



REFERENCE

Chase Bruton, Town Manager



765-759-2203



cbruton@yorktownindiana.org

Relevant Experience

04: CITY OF EVANSVILLE ECONOMIC DEVELOPMENT CONSULTING

Veridus has partnered with the City of Evansville, a community of approximately 115,000 residents, to support the Mayor's Office and its Blue Ribbon Committee in streamlining development approval processes and advancing key opportunities. The engagement involves hosting four structured meetings to evaluate effective practices, address challenges faced by staff and developers, and explore best practices from similar communities. These efforts will culminate in a final presentation with actionable recommendations and a responsibility matrix to position Evansville as a "development-ready" community. The initiative emphasizes creating an incentive toolbox, marketing the city, and fostering a growth-friendly environment.

Additionally, Veridus is providing real estate and development consulting services to support Evansville's housing and retail initiatives. This includes conducting market research to assess demand for residential, commercial, and retail spaces, identifying opportunities based on demographic trends and spending patterns, and analyzing housing needs. Veridus is facilitating developer outreach, organizing strategic roundtables, and crafting marketing materials to attract interest in priority parcels. To further the city's goals, Veridus will assist with project implementation by engaging developers, brokers, and end users, reviewing project details and incentives, and guiding discussions to ensure successful delivery of high-quality developments aligned with the Mayor's vision.



REFERENCE

Stephanie Terry, Mayor



812-436-4962

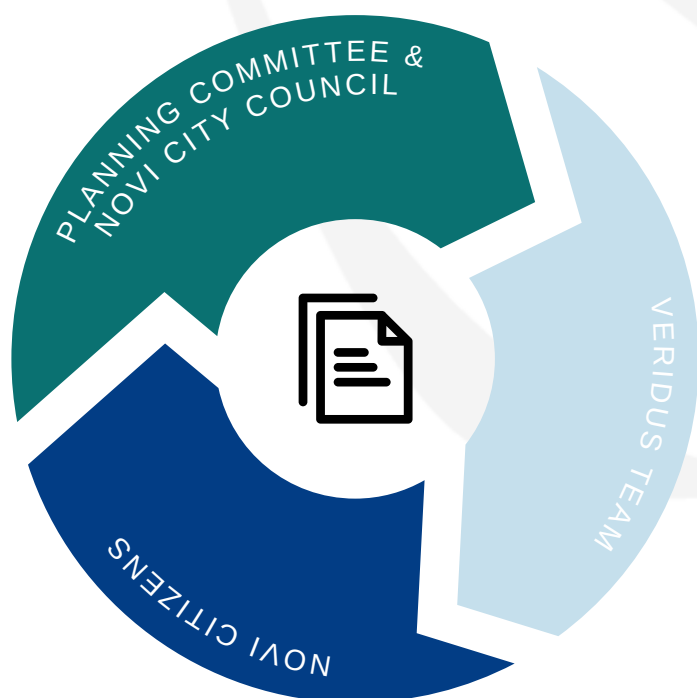


sterry@evansville.in.gov

Project Team

We understand the organization and staffing of the project team are essential to achieving success. Veridus Group, Inc. is comprised of seasoned industry professionals recognized for their commitment to excellence, expertise, and integrity. To ensure seamless communication and efficient project execution, we have designated Jack Woods as the primary point of contact. Jack's expertise in data analytics and community engagement enhances our team's capabilities, ensuring our strategies are both impactful and responsive to community needs. This streamlined structure allows us to draw on the specialized skills of each team member as needed while maintaining a clear and efficient communication channel.

Our Community and Economic Development team will be further strengthened by members of our Veridus Michigan team, who are available to meet in person at any point during the project to support client and stakeholder needs. As members of our Owner's Representative team, they bring valuable insight into the truths and processes of implementation, ensuring recommendations are not only visionary but also practical and actionable. Our Project Executive, Katie Jacobs, brings nearly 30 years of industry experience, including extensive expertise in community input sessions, student and staff surveys, stakeholder engagement, steering committee development and facilitation, master planning, visioning exercises, meeting facilitation, and social media outreach.



Collaboration with the City of Novi's personnel will also be key to the success of this initiative. We are honored to work alongside the Novi City Council and Long-Range Strategic Planning Committee, whose insights and leadership will be vital in understanding the City's vision and goals. Their involvement ensures alignment with Novi's overarching objectives while offering valuable guidance throughout the process. Equally important is the engagement of Novi's citizens. By incorporating their perspectives through community input sessions, we will create a strategic plan that reflects their needs and aspirations, fostering widespread support and buy-in for the final outcomes.

Project Team



Jack Woods

Director, Community & Economic Development

CONTACT



317-441-2100



jwoods@theveridusgroup.com

PROFILE

With nearly ten years of experience in economic development consulting, Jack brings expertise in strategic planning, stakeholder and community engagement, Opportunity Zones, recovery and resiliency planning, and quantitative analysis. His skillset includes workforce forecasting, housing studies, target industry assessments, and sector-specific market analyses.

EDUCATION

Bachelor of Arts, History
DePauw University - Greencastle, IN

RELEVANT EXPERIENCE

- Steuben County Economic Development Strategic Plan - *Project Manager*
- City of Evansville Economic Development Consulting - *Project Lead*
- Wells County Master Plan - *Project Lead*
- Montgomery County Comprehensive Plan - *Project Manager*
- Downtown Seymour Streetscape Plan - *Project Manager*

Additional experience available upon request.



Pete Olson, MPA, ICMA-CM

Director, Government Advisory

CONTACT



765-273-0799



polson@theveridusgroup.com

PROFILE

Pete is a seasoned management professional with over two decades of experience in budgeting, capital project planning, and strategic planning, having served as City Administrator and City Manager in multiple communities. Leveraging his expertise in redevelopment and transparent governance, Pete will offer critical input to guide implementation strategies.

EDUCATION

Bachelor of Arts, Political Science
Fort Hays State University - Hays, KS

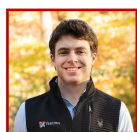
Master of Public Administration
University of Nebraska at Omaha -
Omaha, NE

RELEVANT EXPERIENCE

- Rockport Downtown Revitalization Plan - *Project Manager*
- Wells County Master Plan - *Project Manager*
- Town of Cumberland Market Analysis - *Project Lead*
- Margaret Mary Health Real Estate Consulting - *Project Lead*

Additional experience available upon request.

Project Team



Kody Leach

Project Analyst, Community & Economic Development

CONTACT



317-488-8452



kleach@theveridusgroup.com

PROFILE

Kody leverages his diverse experiences to perform data analysis that informs decision-making processes for municipalities and organizations. His communication skills ensure effective collaboration. Kody will also play a key role in the final design process of the strategic plan deliverable, helping to create a comprehensive, visually engaging, and goal-aligned document.

EDUCATION

Bachelor of Arts, Organizational
Communication and Leadership
Butler University - Indianapolis, IN

RELEVANT EXPERIENCE

- Stueben County Economic Development Strategic Plan - Intern
- Wells County Master Plan - Project Analyst
- Brown County Comprehensive Plan - Project Analyst
- Lincoln Highway Corridor Plan - Project Analyst
- Rockport Downtown Revitalization Plan - Project Analyst

Additional experience available upon request.



Katie Jacobs, AIA, LEED AP

Project Executive, Owner's Technical Representation

CONTACT



269-501-4028



kjacobs@theveridusgroup.com

PROFILE

Katie Jacobs brings nearly 30 years of industry experience to Veridus Group, Inc. She has managed over \$150 million in capital projects, including infrastructure improvements, new buildings, and master plans, all delivered on time and within budget. Katie excels in community engagement, stakeholder collaboration, and master planning, ensuring impactful outcomes.

EDUCATION

Bachelor of Science, Biology
Oberlin College - Oberlin, OH

Masters of Architecture
*University of Wisconsin Milwaukee
School of Architecture and Urban
Planning - Milwaukee, WI*

RELEVANT EXPERIENCE

- Hilltop Village Master Plan, Western Michigan University (WMU)
- Transportation Master Plan, WMU
- Dunbar Hall Addition and Renovation, WMU
- Business, Technology, and Research Park North, WMU
- Arcadia Flats, WMU

Additional experience available upon request.

Project Team



Jon Ackley-Jelinek

Project Manager, Owner's Technical Representation

CONTACT



219-309-4723



jackleyjelinek@theveridusgroup.com

PROFILE

With extensive experience spanning design, construction, non-profit work, and municipal government, Jon champions a human-centered approach to problem-solving. Jon's unwavering dedication to efficient systems and processes significantly enhances the collective impact of the Veridus team for the City of Novi project.

EDUCATION

Bachelor of Landscape Architecture
Michigan State University - East
Lansing, MI

RELEVANT EXPERIENCE

- City of Owosso City Hall - *Project Manager*
- City of Nappanee Fire Station 1 - *Project Manager*
- St. Joe County Public Library - *Project Manager*
- Okemos Public Schools - *Project Manager*
- Mattawan Consolidated School District - *Project Manager*

Additional experience available upon request.



Tim Jensen, PE, LEED AP

President / Principal

CONTACT



317-450-7653



tjensen@theveridusgroup.com

PROFILE

Tim founded Veridus in 2011 to deliver representation for project owners in real estate, development, and construction. He now leads a team of diverse professionals excelling in Community & Economic Development, Owner's Representation, and Civil/Site Engineering. Tim will provide high-level leadership, engagement, and guidance throughout the project.

EDUCATION

Bachelor of Science, Civil Engineering
Purdue University - West Lafayette, IN

RELEVANT EXPERIENCE

- Town of Danville Strategic Plan - *Project Executive*
- Speedway Economic Development Strategic Plan - *Project Executive*
- Steuben County Economic Development Strategic Plan - *Project Principal*
- Yorktown Downtown Redevelopment - *Project Principal*
- City of Lawrenceburg Comprehensive Master Plan - *Project Executive*

Additional experience available upon request.

Project Approach

The goal of the Veridus Community and Economic Development team is to give a community, or organization, a plan they can enact. Our process starts with analysis of current trends in a community, or region, and engaging leaders and key stakeholders to qualitatively understand current conditions. Together, we create a Vision for the future of the community, or region; we plan for the steps needed for the success of that vision. Ultimately, our approach to community and economic development reflects the Veridus belief in focusing on both the **people** involved in the project and the project's **process**.

People + Process

We believe in personal relationships. Understanding the people we interact with in projects, and building relationships with them, will help us better lead the team in delivering a quality project. People need to feel relevant and be heard, and we believe successful projects require team members and stakeholders experience both. We have found that issues and conflicts are much easier solved in the context of relationship.

We believe process is critically important. Each project brings a unique set of circumstances and challenges. Processes help to defuse difficult situations and provide opportunities for tracking and recovery where needed. Successful projects crave predictability but are prepared to overcome challenges as they arise. Process provides guardrails for management and difficult conversations.

UNIQUE TOOLS



Lightcast: A data analytics tool that provides detailed labor market insights, including workforce trends, industry growth, and talent supply-demand analysis. It helps inform strategic decision-making by offering precise, quarterly updated data for community and economic development projects.

Esri Business Analyst: A powerful GIS tool that combines demographic, economic, and geographic data derived from sources like the U.S. Census and American Community Survey (ACS). It provides detailed insights on community characteristics, market trends, and development patterns to support informed decision-making for strategic planning and resource allocation.

QGIS: An open-source Geographic Information System (GIS) software that enables spatial analysis and data visualization through customizable mapping tools. It supports informed decision-making by allowing users to analyze geographic patterns, overlay datasets, and generate detailed maps for planning and development projects.

Chat GPT: An AI-powered language tool that enhances decision-making and productivity by assisting with data analysis, report writing, and content generation. As an additional tool, it complements platforms like Esri Business Analyst, Lightcast, and QGIS by helping synthesize insights, draft summaries, and streamline communication, making it a versatile resource for planning and development projects.

Project Approach

Community Engagement

The Veridus team is dedicated to a comprehensive engagement strategy that ensures meaningful involvement from the City of Novi, Long-Range Strategic Planning Committee, additional stakeholders, and the broader community throughout the project. Our approach emphasizes fostering collaboration, transparency, and effective communication by employing proven strategies tailored to meet the unique needs of each project. Regular meetings with the Long-Range Strategic Planning Committee and key City of Novi Council and staff members will serve as the foundation for this process, providing consistent updates, aligning objectives, and enabling collaborative decision-making. These interactions ensure the Long-Range Strategic Planning Committee's leadership remains informed and actively engaged at every stage. Additionally, targeted stakeholder sessions will engage groups such as business owners, residents, government and non-profit representatives, and other key organizations, allowing their unique insights to inform and enrich the planning process.

To broaden public communication and participation, Veridus employs innovative tools and techniques designed to maximize community input. Public surveys are a key component, crafted to gather detailed feedback and enable residents to voice their priorities and concerns. A dedicated project website serves as a central information hub, offering real-time updates on milestones, timelines, and events while providing an accessible platform for ongoing public input. For those unable to attend in-person meetings, virtual town halls ensure broad accessibility, allowing all community members the opportunity to participate and share their opinions. These tools are complemented by in-person engagement events such as public meetings, visioning workshops, and interactive forums that foster a sense of collaboration and ownership among participants.

In past projects, Veridus has facilitated workshops with diverse stakeholders to balance growth with cultural preservation, capturing feedback from thousands of community members. By combining communication, innovative tools, and inclusive practices, Veridus creates a robust framework for collaboration, ensuring every voice contributes to project success.

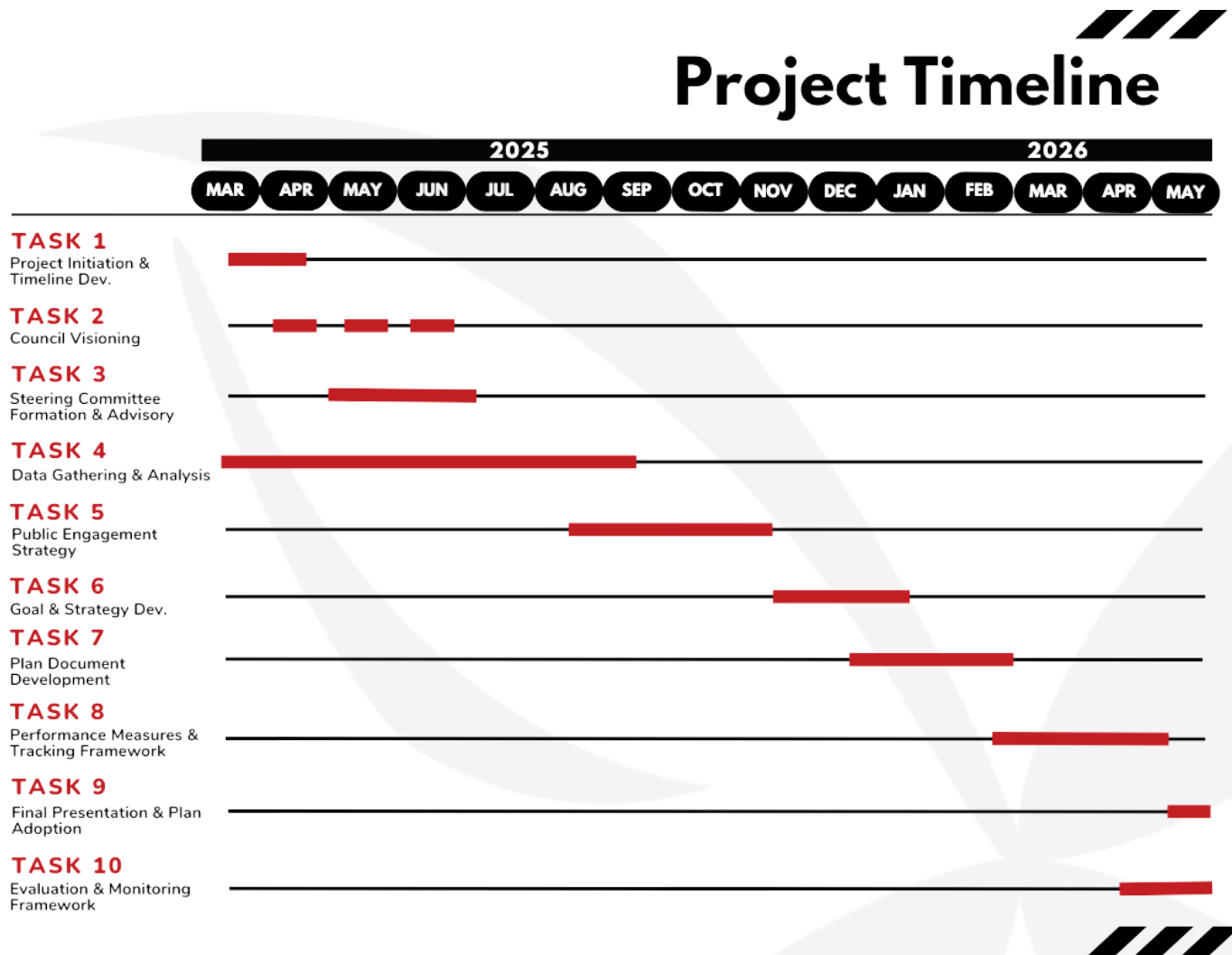
“

*Plainfield is very pleased with the work Veridus has done for the town. They have become an extension of our staff. **Our relationship with Veridus has allowed us to pursue far more projects than we would be able to do alone** and they have been a key element in helping to grow and develop our community.*

– Andrew Klinger, Town Manager, Plainfield, Indiana

Project Timeline

The proposed timeline details all project tasks, encompassing major milestones, phases of engagement, and deliverable deadlines as outlined in the Scope of Work section of this proposal. Aligned with the anticipated start date of late winter or early spring 2025, the Veridus Community & Economic Development team is dedicated to delivering all milestones and deliverables on schedule while remaining adaptable to any adjustments made by the Long-Range Strategic Planning Committee.



PROPOSED CONTRACT TERM

Our team proposes a 15-month contract beginning in early Spring 2025 - around March - and concluding in May of 2026 to align with the City's proposed project timeline. The contract will include phased deliverables to ensure alignment with project milestones. Billing will be based on the percentage of completion for each phase, allowing for transparency and alignment of costs with progress. This approach ensures the City only pays for work completed to date and allows for adjustments based on the project's evolving needs. Regular updates and check-ins will be scheduled to monitor progress and maintain alignment with the agreed-upon timeline.

Cost Breakdown

Based on the tasks identified in the Scope of Work, our team has estimated the cost to successfully deliver these services to the City of Novi. We propose the following fee and cost breakdown to complete the facilitation of the community strategic planning process.

Total Project Fee: \$120,250.00

Task	Cost
Project Initiation and Timeline Development	\$10,960.00
Council Visioning	\$15,910.00
Steering Committee Formation and Advisory	\$10,030.00
Data Gathering and Analysis	\$15,620.00
Public Engagement Strategy	\$19,880.00
Goal and Strategy Development	\$9,900.00
Plan Document Development	\$11,700.00
Performance Measures and Tracking Framework	\$9,900.00
Final Presentation and Plan Adoption	\$8,600.00
Evaluation and Monitoring Framework	\$7,750.00
Total	\$120,250.00

City Collaboration

City staff will play a vital role in the success of the Novi 2050 strategic planning process by providing essential local insights, logistical support, and coordination. We will collaborate closely with staff to access existing data, reports, and community resources, ensuring our work aligns with Novi's current initiatives and priorities. Staff will assist in coordinating community outreach efforts, such as distributing surveys, promoting workshops, and facilitating communication with stakeholders. Additionally, we will rely on their expertise to guide logistics for meetings, including scheduling, venue arrangements, and participant engagement. By leveraging the knowledge and support of City staff, we will ensure a seamless and efficient process while minimizing additional burdens on their time.

TIME REQUIREMENTS

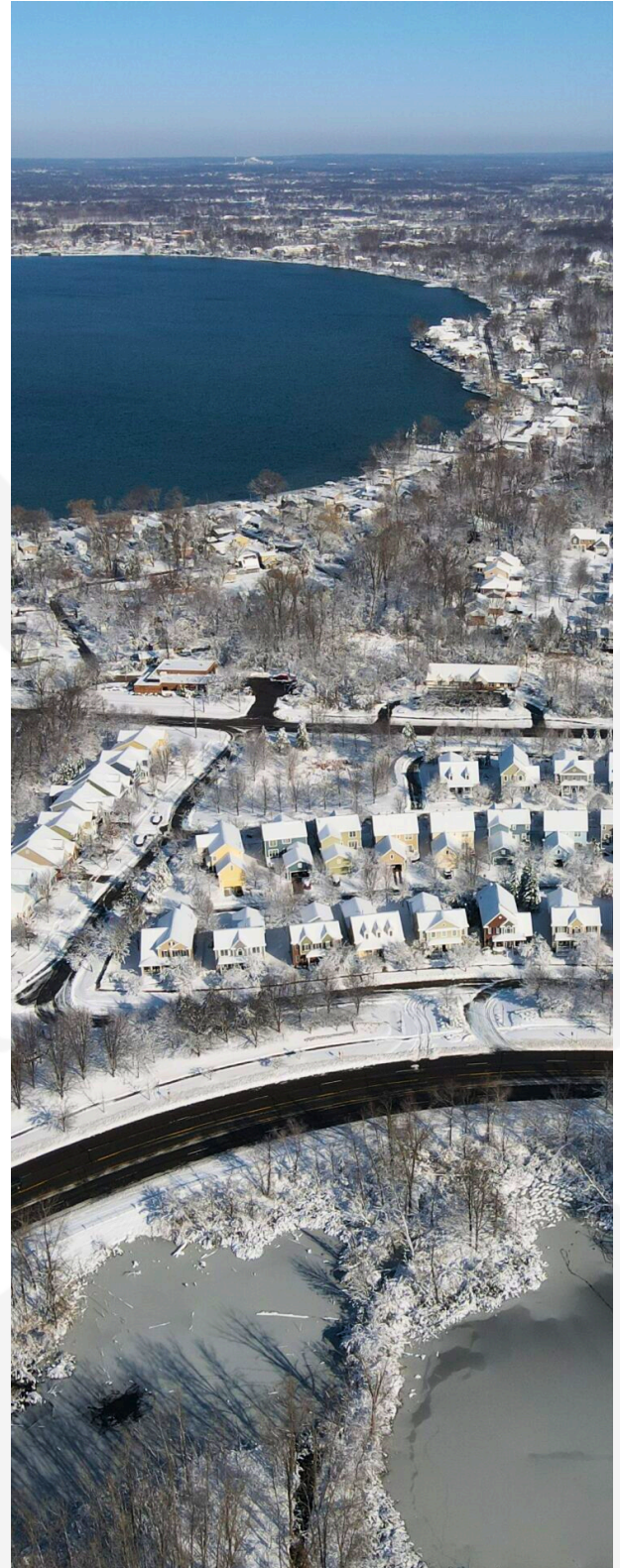
City staff will play a role in supporting the Novi 2050 strategic planning process by providing local expertise and logistical assistance. We anticipate requiring **no more than five hours per week** of staff time during key project phases. Staff will assist in sharing existing data and reports, coordinating community outreach through City communication channels, and managing logistical details for meetings, such as scheduling and venue arrangements. Additionally, their feedback on draft materials will help ensure alignment with City goals and priorities. This focused collaboration will maximize efficiency while minimizing the impact on staff workloads.

DOCUMENTATION

To support the assessment and completion of the Novi 2050 strategic planning process, we will request key documents and information from City staff, including:

- previous strategic and master plans;
- documents regarding City policies and programs;
- stakeholder contact lists; and,
- building permit data and relevant geographic or environmental data, such as maps or GIS information.

These resources will provide the foundation for informed analysis, meaningful engagement, and the development of actionable strategies tailored to Novi's needs and goals.





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FEES AND Expenses

Fees and Expenses

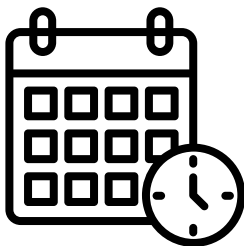
As stated in the “Cost Proposal” section of this proposal, our team has estimated the cost to successfully facilitate the community strategic planning process for the City of Novi to be \$120,250.00. This estimate is based on the below 2025 standard hourly rates. We anticipate billing monthly by percent complete. Monthly invoices will also include reimbursable expenses but will not exceed the total project cost.

Role	Rate / Hour
President / Vice President	\$225
Director	\$210
Project Analyst	\$185
Administrative	\$100

REIMBURSABLES

- Overnight postage, certified mail, and delivery services;
- Reproduction services for plans and specifications;
- Permit or applications fees as paid by Veridus Group, Inc.; and,
- Project-related mileage at the current federal rate.

PAYMENT SCHEDULE



Our proposed payment schedule will follow a monthly billing cycle, based on the percentage of project completion. Each invoice will reflect the percentage of work completed for the corresponding project phase, accompanied by a detailed summary of activities performed and milestones achieved during that period.



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SCOPE OF Work

Scope of Work

Outlined below is our proposed Scope of Work for the City of Novi. While our approach is designed to address all key elements outlined in the Scope of Services provided in the RFP, we welcome the opportunity to discuss any additional items you would like included. Our team is committed to tailoring our services to meet your specific needs and expectations.

1 PROJECT INITIATION AND TIMELINE DEVELOPMENT

The project will begin with a comprehensive kick-off meeting to establish roles, objectives, and timelines, setting the stage for a structured and collaborative process. This meeting will outline project administration protocols and ensure alignment on expectations. Following this, we will finalize a visual timeline encompassing key milestones such as visioning sessions, community engagement efforts, strategy development, and plan adoption. The timeline will ensure clear deliverables and regular touchpoints for progress reviews.

2 COUNCIL VISIONING

To align City Council priorities with the long-term goals of the Novi 2050 initiative, three targeted visioning sessions will be conducted:



Session 1: Setting Core Values and Principles - This session will focus on identifying the guiding principles and core values that define Novi's identity and aspirations. These foundational elements will serve as the lens through which all strategic goals and initiatives are evaluated, ensuring alignment with the city's ethos.



Session 2: Identifying Opportunities and Challenges - In this session, the council will assess key opportunities for growth and improvement alongside potential challenges the city may face by 2050. This collaborative discussion will help prioritize areas of focus, such as economic development, sustainability, and quality of life.



Session 3: Drafting the Vision Statement - The final session will synthesize the outcomes of previous meetings into a cohesive vision statement for Novi 2050. This shared vision will act as a unifying narrative, setting a clear direction for the strategic plan and providing inspiration for the community's future.

Each session is critical to building consensus among council members and establishing a shared commitment to Novi's long-term strategic goals.

3 STEERING COMMITTEE FORMATION AND ADVISORY

The formation of a diverse and inclusive Steering Committee will be a priority. This task includes developing a clear structure for the committee, including roles, meeting schedules, and decision-making protocols. Special attention will be given to ensuring the committee reflects the demographics of the community, promoting balanced and equitable input. Regular advisory sessions will equip the committee with tools and frameworks to facilitate effective collaboration.

Scope of Work

4 DATA GATHERING AND ANALYSIS

Comprehensive data collection and analysis will be conducted to inform the strategic planning process. This includes a deep dive into Novi's demographic, economic, and environmental data to identify trends and implications for the city's future. Specific focus areas will include:

Demographic Analysis: Assessing population growth, age distribution, education levels, and cultural diversity to understand the evolving needs of Novi's residents.

Economic Data: Evaluating local employment trends, business growth, income levels, and industry dynamics, with attention to maintaining Novi's economic vitality.

Environmental Insights: Reviewing land use, green space, and sustainability indicators to support long-term environmental stewardship and resilience.

Advanced analytical tools and visualization techniques will be used to identify patterns and emerging challenges. The findings will guide data-driven decision-making and align strategic goals with Novi's unique characteristics and future potential.

5 PUBLIC ENGAGEMENT STRATEGY

A comprehensive outreach strategy will be employed to involve stakeholders and foster meaningful participation. It includes the following components:



Community Survey: A citywide survey will be conducted to gather insights on residents' values, priorities, and vision for Novi's future. The survey will be designed to be inclusive and accessible, with distribution via digital platforms, email, and physical copies in community centers.



Focus Groups: Three targeted focus groups will engage specific stakeholder segments, such as business leaders, civic organizations, and underrepresented communities. Each session will foster in-depth discussions on key topics and challenges identified in the survey.



Public Workshops: Two interactive public workshops will be held to gather ideas and refine proposed strategies. These workshops will include activities like visioning exercises, priority setting, and scenario planning to encourage broad participation and collaboration.

Frequency and methodology for each component are designed to ensure meaningful engagement and comprehensive input from all sectors of the community. Our team will collaborate with the city to develop inclusive engagement tools and opportunities tailored for residents with limited English proficiency.

Scope of Work

6 GOAL AND STRATEGY DEVELOPMENT

Using insights from data analysis and public engagement, the Steering Committee will work to define clear, actionable goals. Each goal will include tailored strategies that align with city policies and resources, ensuring feasibility and long-term impact. Scenario planning will test the strategies' adaptability to changing circumstances, ensuring they remain comprehensive.

7 PLAN DOCUMENT DEVELOPMENT

The draft Novi 2050 strategic plan will compile the vision, goals, and strategies into a clear and accessible document. Visual aids, infographics, and charts will enhance the presentation, making it engaging for a broad audience. Feedback from stakeholders, including the Steering Committee and City Council, will refine the final plan to ensure inclusivity and alignment.

8 PERFORMANCE MEASURES AND TRACKING FRAMEWORK

A comprehensive performance tracking framework will be developed to measure progress toward Novi 2050 goals. Key performance indicators (KPIs) will be defined for each strategic area, with methodologies for consistent data collection and reporting. The framework will include visual dashboards and templates to facilitate transparency and regular updates. Training sessions for City staff and the Steering Committee will ensure effective implementation.

9 FINAL PRESENTATION AND PLAN ADOPTION

The finalized Novi 2050 plan will be presented to the City Council and community stakeholders. A high-level summary document will distill the plan's key components for broader public distribution. Feedback from the presentations will be incorporated into the final version, ensuring alignment with community expectations and fostering public support.

10 EVALUATION AND MONITORING FRAMEWORK

To maintain the plan's relevance, a structured evaluation and monitoring framework will be established. This framework will include periodic reviews, progress reports, and community feedback loops. Recommendations for updates and adjustments will ensure the plan evolves with emerging challenges and opportunities, aligning with Novi's long-term goals.



Our Approach

Our approach to the Novi 2050 strategic planning initiative is built on **collaboration, data-driven insights, and actionable outcomes**. By prioritizing inclusivity and transparency, we will deliver a plan that reflects community aspirations and provides a clear roadmap for sustainable growth.

We will facilitate meaningful engagement with City Council, residents, businesses, and civic organizations through surveys, focus groups, and workshops. These activities will ensure diverse perspectives shape the vision and goals for Novi 2050. Robust analysis of demographic, economic, and environmental data will guide the development of strategies that address community needs and opportunities.

Key deliverables include a detailed project timeline, facilitation materials, data analysis reports, and a final strategic plan with clear goals, actionable strategies, and a performance tracking framework. Public-facing materials, including a summary document, will ensure accessibility and transparency.

Our work will follow a milestone-based schedule, with compensation based on percent complete in relation to project phases. This phased approach ensures accountability and alignment with the City's goals at every step.

By combining expert facilitation with innovative engagement and data-driven planning, we will equip Novi with a strategic plan that is both visionary and achievable.

WHY VERIDUS?



Our approach delivers maximum value by combining inclusivity, efficiency, and actionable results. *Through meaningful community engagement and robust data analysis, we ensure the strategic plan reflects the community's aspirations while focusing resources on initiatives with the greatest impact.* Our streamlined process, informed by municipal best practices, reduces inefficiencies and aligns strategies with Novi's long-term goals.

Our percent complete-based payment structure ensures transparency and accountability, while leveraging digital tools alongside in-person outreach minimizes costs without sacrificing engagement. By prioritizing targeted, data-driven planning and inclusive collaboration, our approach provides Novi with a high-impact, cost-effective strategic plan that sets the foundation for sustainable success.



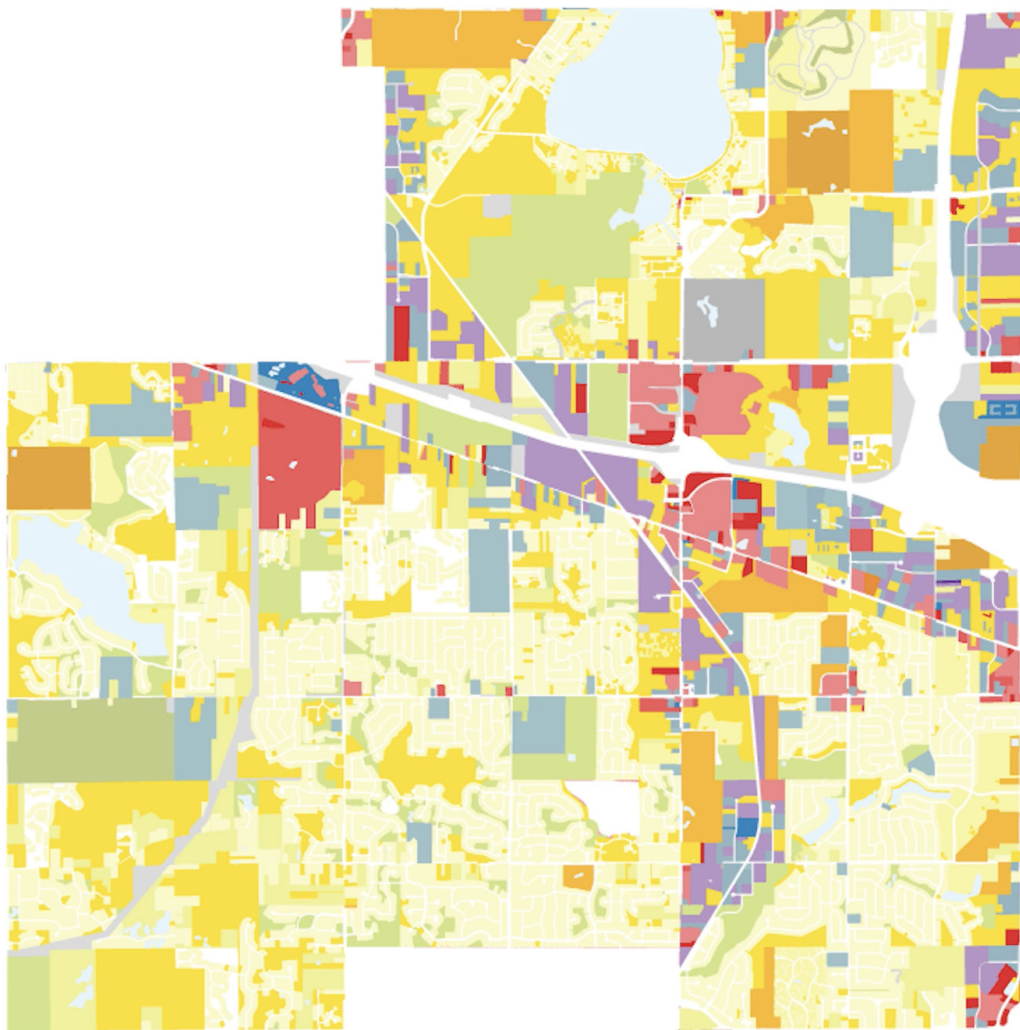
FACILITATION OF THE NOVI 2050 COMMUNITY STRATEGIC PLANNING PROCESS

Prepared for



City of Novi
Finance Counter, 2nd Floor
45175 Ten Mile Road
Novi, MI 48375

P: 248-347-0460
W: <https://cityofnovi.org/>
E: vcardenas@cityofnovi.org
RFP Novi 2050



City of Novi Land Use map 2020

Address

1001 Woodward
Suite 500
Detroit, MI 48226

Contact

Phone : +248-854-1287
Email: salam@9xsdesign.com
Website: www.9xsdesign.com

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9XS Design

PROJECT PROPOSAL

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Letter of Transmittal

Victor Cardenas
City Manager
City of Novi
Finance Counter, 2nd Floor
45175 Ten Mile Road
Novi, MI 48375

Re: Proposal for Facilitation of the Novi 2050 Community Strategic Planning Process

Dear Mr. Cardenas,

On behalf of 9XS Design, I am excited to submit this proposal to facilitate the Novi 2050 Community Strategic Planning Process. With a deep commitment to fostering inclusive, innovative, and actionable strategies, we aim to support the City of Novi in developing a visionary plan that reflects the community's aspirations and priorities.

Our team brings extensive experience in municipal strategic planning, public engagement, and placemaking. Notable projects include Downtown Design Dialogue, which facilitated collaborative conversations around urban design in a dynamic city context; Museum Trail, an initiative that combined innovative mobility planning and public art integration; and Fertile Ground, a citywide public art project rooted in community engagement and funded by Bloomberg Philanthropies. These experiences demonstrate our ability to collaborate with stakeholders, navigate complex urban issues, and deliver actionable, community-centered outcomes.

This proposal outlines our approach to delivering a comprehensive and community-driven process. Our commitment is to facilitate meaningful engagement with residents, City Council members, business leaders, and other key stakeholders, ensuring that the Novi 2050 plan is grounded in collective vision and data-driven insights.

I will serve as the primary point of contact and am authorized to make representations on behalf of 9XS Design. Please do not hesitate to reach out at the contact information listed above with any questions or requests for clarification.

We look forward to the opportunity to partner with the City of Novi on this transformative initiative. Thank you for considering our proposal, and we are excited to contribute to shaping a thriving future for your community.

Cordially,



Salam Rida | Principal | 9XS Design

Statement of Addendum

I, Salam Rida, Principal of 9XS Design, acknowledge receipt of the following addenda issued by the City of Novi for the Novi 2050 Community Strategic Planning Process RFP:

Addendum No. 1, dated 01/14/2025 01:54 PM EST

Addendum No. 2, dated 01/17/2025 04:38 PM EST

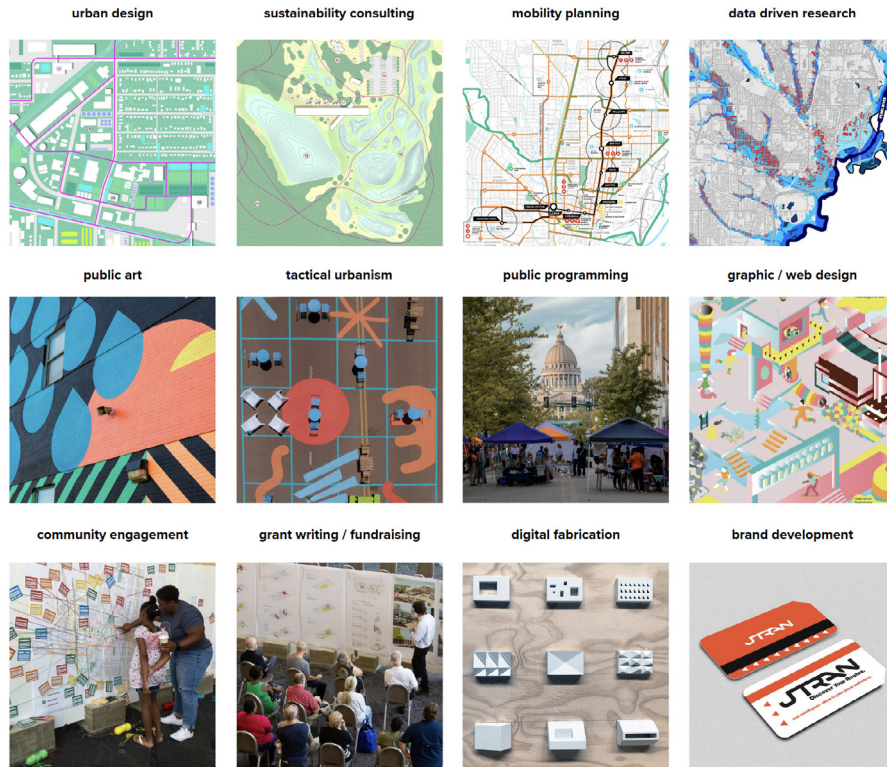
These addenda have been reviewed, and any modifications or clarifications provided within them have been incorporated into our proposal.

Sincerely,

A handwritten signature in black ink, reading "Salam Rida", is positioned above a horizontal line.

Salam Rida | Principal | 9XS Design

9XS Design



About

9XS Design is an interdisciplinary design firm dedicated to creating impactful solutions that bridge the gap between urban design, community engagement, and sustainability. Founded on the principle that thoughtful design has the power to transform communities, 9XS Design specializes in projects that balance innovation with inclusivity. From strategic planning to creative placemaking, our work reflects a deep commitment to amplifying local voices and fostering environments where people thrive. Headquartered in Detroit, we bring a unique perspective shaped by years of experience working in urban environments across the country.

Values

At 9XS Design, we believe that collaboration is the cornerstone of successful projects. Our process begins with listening to communities, stakeholders, and the natural and built environments. Using data-driven analysis and creative thinking, we craft strategies that are as actionable as they are visionary. Engagement is woven throughout our approach, ensuring that every plan is informed by the lived experiences of those it serves. From the first sketch to the final implementation, we prioritize adaptability, allowing our designs to evolve with changing circumstances while remaining grounded in the community's goals.

Process

At the heart of 9XS Design is a commitment to equity, sustainability, and impact. We believe that every project should leave a community better than we found it socially, economically, and environmentally. A key part of our process involves providing accessible visualizations and physical 3D-printed models that allow community members to fully engage with and shape the design process. These tools make complex ideas tangible, fostering dialogue, collaboration, and trust among all stakeholders. Our work is grounded in the principles of environmental stewardship, creating spaces and systems that are resilient and regenerative. Above all, we are committed to fostering joy and connection through design, empowering communities to realize their full potential.

X	X	X
X	X	X
X	X	X

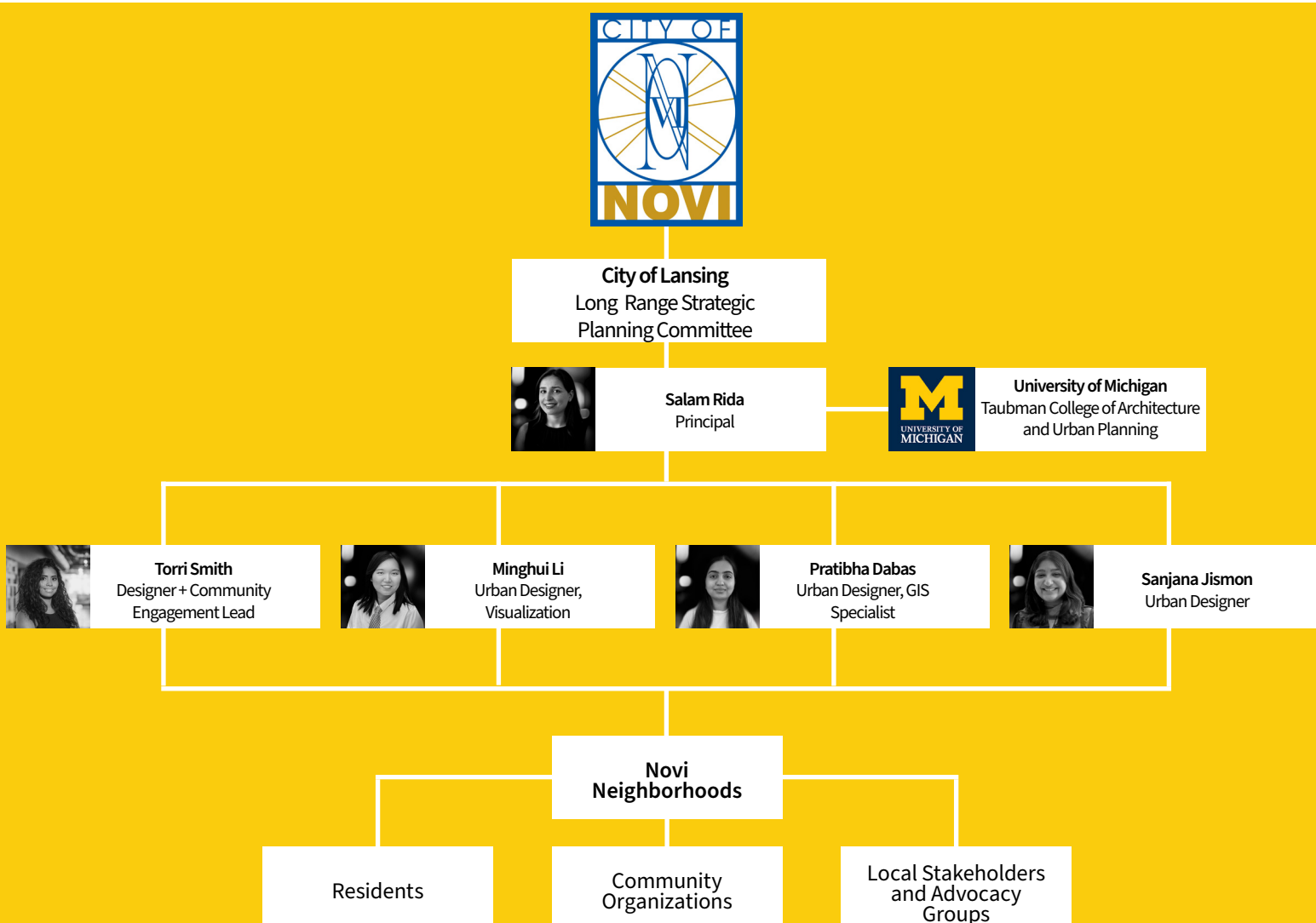
Project Team

The organizational chart demonstrates our commitment to a structured yet collaborative approach that aligns directly with the goals of the Novi 2050 Community Strategic Planning Process. By positioning the City of Novi and its Long-Range Strategic Planning Committee at the forefront, we emphasize their leadership role in driving the visioning process. Our team structure reflects a clear and strategic distribution of expertise, bringing together specialists in strategic planning, community engagement, urban design, and data analysis to support the city's aspirations for a dynamic and inclusive future.

This chart highlights our process of actively engaging with the City of Novi to understand and collaboratively address its unique needs and priorities. Our structure is designed to integrate seamlessly with the City's Steering Committee, ensuring that diverse voices, residents, business leaders, civic organizations, and other stakeholders are effectively engaged at every stage. By emphasizing these connections, we aim to create a collaborative and transparent framework that bridges professional expertise with local insights.

Our team includes specialists in public engagement, equity-focused design, and long-term strategic planning, ensuring that every aspect of this process, from visioning workshops to strategy development, is executed with care, precision, and a commitment to inclusivity. By engaging residents from all segments of Novi's community, including historically underrepresented groups, we ensure that the strategic planning process reflects the full breadth of voices shaping the city's future.

In addition to our focus on inclusivity, our team is experienced in designing actionable frameworks for performance measurement and ongoing evaluation, ensuring that Novi 2050's goals are not only aspirational but also achievable. Together, we bring a unique combination of local knowledge, technical expertise, and innovative methodologies to deliver a strategic plan that positions Novi as a model for thoughtful, inclusive, and forward-looking community planning.



9XS DESIGN

SALAM RIDA

PRINCIPAL



Salam Rida is a designer and educator recognized for her unwavering commitment to advancing spatial justice and equity within the realm of design. She previously established and led the long-range planning division at the City of Jackson, where she worked on transformative projects that addressed systemic challenges across multiple scales. Rida's extensive experience spans the non-profit, government, private, academic, and philanthropic sectors, equipping her with the ability to navigate complex, interdisciplinary projects with ease. She is the founder of 9XS Design, an interdisciplinary practice focused on creative placemaking, tactical urbanism, incremental design, and sustainability. Salam is passionate about the impact of the built environment on quality of life and the responsive role design plays in engaging stakeholders throughout the design process.

EDUCATION

Bachelor of Science

University of Michigan
Ann Arbor

2011

Master of Architecture

University of Michigan
Ann Arbor

2017

RECENT AWARDS

ARIA GRANT

Detroit At Play

Arts Initiative, University of
Michigan

2024

ARTS AND RESISTANCE

Unearthed Currents

Arts Initiative, University of
Michigan

2023

EXPERIENCE

Detroit MI | Design Coordinator 2022-Current

FMP 1 and 5 Detroit Public School District- New construction

Ann Arbor MI | Lecturer 2022-Current

Michigan Mellon Design Fellow- Taubman College

Detroit MI | Designer 2024

Unearthed Currents, Public Art Installation

Jackson MS | Project Manager 2021

Farish Street- Masterplan

Jackson MS | Project Manager 2020-2022

Museum Trail- Masterplan, Brand Identity

Jackson MS | Designer, Co-Founder, Co-Owner 2017-2022

Ecoshed- Adaptive Re-Use Construction

Jackson MS | Project Manager 2018-2020

ONELINE Bus Rapid Transit- Masterplan

Jackson MS | Project Manager 2018-2020

Downtown Convention Center- Masterplan

Jackson MS | Project Manager 2018-2020

Bloomberg Philanthropies Public Art Challenge: Fertile Ground Project

9XS DESIGN

TORRI SMITH

DESIGNER AND ENGAGEMENT LEAD



Torri Smith is a Detroit based designer, artist and educator; her investigations span from environmental justice and design biology to storytelling and urban placemaking. Smith has nine years of design experience within the city of Detroit. She currently works at both Hannah Architects and additionally serves as the Principal + Founder of ARC BAE. In addition, Smith teaches as a Lecturer I faculty in both the Architecture and Urban Technology programs at Taubman College and is the current Director for ArcStart; a pre-college summer program for high school students. Smith currently conducts research related to her interests at the intersection of environmental justice, urban activism and design while simultaneously exploring the ways in which ecological regeneration can address systemic racial inequity.

EDUCATION	EXPERIENCE
<div><div>Bachelor of Science</div><div>Lawrence Technological University</div><div>2015</div></div> <div><div>Master of Architecture</div><div>University of Michigan</div><div>Ann Arbor</div><div>2021</div></div>	<div><div>Detroit MI , Designer 2024-Current</div><div>Michigan Central Station- Tenant Space Interior Design</div></div> <div><div>Ann Arbor MI Director 2024-Current</div><div>ArcStart Pre-College Program- Taubman College</div></div> <div><div>South Bronx NY Principal, Design Lead 2023-2024</div><div>Emerging Leaders Center- Interior buildout</div></div> <div><div>Detroit MI Designer 2023-Current</div><div>North End Landing- Masterplan, New construction</div></div> <div><div>Detroit MI Designer 2021-Current</div><div>Perfecting Church- New construction</div></div> <div><div>Detroit MI Design Lead, Owner 2021</div><div>14801 East Jefferson- Adaptive reuse</div></div> <div><div>Green Bay WI Designer 2017-2019</div><div>Lambeau Field- Interior renovation</div></div> <div><div>Phoenix AZ Designer 2016-2018</div><div>ISM Raceway- Exterior Renovation, New construction</div></div>
RECENT AWARDS	
<div><div>ARIA GRANT</div><div>Detroit At Play</div></div> <div><div>Arts Initiative, University of Michigan</div><div>2024</div></div> <div><div>JASON PETTIGREW AWARD</div><div>Memorial ARE Award</div></div> <div><div>Architects Foundation</div><div>2021</div></div>	

9XS DESIGN

MINGHUI LI

URBAN DESIGNER



Minghui Li is a passionate urban designer and architect actively seeking to make an impact in changing the world creatively focusing on sustainability and the social environment. Her interest is across urban design, landscape, and architecture fields at various scales with varying typologies. Before coming to 9XS Design, she worked as a project assistant collaborating with the Institute of Sociology and Taubman College, using models and animations to visualize and disseminate knowledge of the housing inequality problem and scenarios of initiative solutions in Detroit. She had rich experience working on architecture and urban design projects in China. Her curiosity about the design world drives her to continually explore design methods and cutting-edge technologies while being committed to creating innovative and impactful solutions for urban and building challenges.

EDUCATION

Master of Urban Design

*University of Michigan
Ann Arbor*

2023

Master of Science, Architecture and Urban Design

University of California, Los Angeles

2022

Bachelor of Architecture

Tianjin University

2020

AWARDS

FIRST AWARD

Beijing 798(Art Dist.) International Design Week Brick-Construction Design Award

/ 2016

CERTIFICATION

LEED Green Associate

/ 07.2013 - 07.2025

EXPERIENCE

PROGRAM ASSISTANT

University of Michigan / Ann Arbor / 2022-2023

Designed a series of scenarios and used Cinema4D to produce the animations for the Housing Inequality video, intended to: examine housing inequality, discuss historical context, highlight the racial wealth gap, address contemporary issues, and propose solutions.

INTERN

URBANUS, Architecture and Design / Beijing / 2021

Developed preliminary design for the renovation of the Shenyang Iron and Steel Works. Assisted with schematic design of Baisha Island Mixed-Use Project, Yang's Art Exhibition in Hangzhou, facade design of the Cultural Hall of Zhuozhou. Wrote weekly reports in Sanlian Chengdu magazine.

INTERN

Tianjin Construction Engineering Group Architectural Design Co., Ltd / Tianjin / 2019

Made construction drawings and assisted with design development for a bus stop and residential renovation.

VISITING STUDENT

Senior Students Urban Design- TJU & University of Michigan Joint Design Workshop / Ann Arbor / 2018

Participated in the joint urban design of the Hutong area in Xiguan Avenue, Tianjin. Selected as undergraduate student representative to give the final presentation on Vertical Hutong at Taubman College.

9XS DESIGN

PRATIBHA DABAS

URBAN DESIGNER AND GIS SPECIALIST



Pratibha is an architect from India who recently earned a Master's degree in Urban Design from the University of Michigan. She consistently views design as a powerful tool to influence people's lives positively. Before embarking on her graduate studies, Pratibha worked in an multidisciplinary design firm where she contributed to three city redevelopment projects. While pursuing her studies, Pratibha undertook a thesis project focused on the rapid urban transformation affecting rural land and livelihoods on the urban fringe of New Delhi, India. Her research highlights the importance of incorporating ethnographic methods to integrate local knowledge into design work effectively. Most importantly, in an era marked by climate uncertainty, Pratibha emphasizes the need to develop co-design solutions that are adaptable and responsive to the needs and capacities of citizens.

EDUCATION

Bachelor of Architecture*G.G.S.I.P.U.**New Delhi, India*

2021

Master of Urban Design*University of Michigan**Ann Arbor*

2023

AWARDS

FIRST AWARD*International Institute Individual Fellowship (IIIF)*

/ 2022 - 2023

SECOND AWARD*Merit based scholarship from the University of Michigan*

/ 2022 - 2023

CERTIFICATION*CA/2022/142531*

/ 2022 - Present

EXPERIENCE

RESEARCH EXPERIENCE*University of Michigan / Ann Arbor / 2022-2023*

Proposal: Inside-Out: Delhi's peripheral Urbanities

Researched encroachment issues in Delhi's peri-urban fringes, revealing how unchecked development led to waterlogging and decline of existing villages.

ARCHITECTURAL DESIGNER*Daaki Pvt. Ltd. / India / 2021-2022*

Daaki Headquarters: Mixed-use development: Adaptive reuse and Energy efficient design of an old factory

Co-lead conceptual and schematic design, building construction and 3-d modelling.

DESIGN INTERN*Studio Archohm / India / 2020-2021*

Ekamra Plan Urban Rejuvenation :\$20 million+ District and Citywide master planning and landscape design project.

Hussainabad Heritage Walk, Museum Design: 0.8 mile heritage walk mixed-use development.

H&N Temple Design: Master planning and Landscape design project.

Oranje Castle Group Housing/MVRDV+Studio Archohm: 437-unit housing project on a 7-acre site.

9XS DESIGN

SANJANA JISMON

URBAN DESIGNER



Sanjana is an urban designer and architect who finds her interests deeply rooted in envisioning cities that champion social justice and equity, emphasize resilience, and weave compelling narratives. Her approach to crafting inclusive environments seamlessly merges imaginative urban design tactics with a keen focus on placemaking. With each project, she prioritizes community empowerment, firmly believing that design possesses the power to eloquently convey narratives, enthralling audiences and fostering a sense of belonging. Throughout her career, she endeavors to co-create cities that surmount obstacles and pave the way for a future characterized by egalitarianism, sustainability, and connectivity.

EDUCATION

Bachelor of Architecture

University of Kerala
India

2019

Master of Urban Design

University of Michigan
Ann Arbor

2023

AWARDS

FIRST AWARD

Merit Based Scholarship from
the University of Michigan

/ 2022 - 2023

SECOND AWARD

'Popular Entry' award for Streets
for People Kochi Competition

/ 2021

CERTIFICATION

COA India CA/2020/114283

/ 2020-2025

EXPERIENCE

GRADUATE RESEARCH ASSISTANT

University of Michigan / Ann Arbor / 2023

Collaborated in developing the website for the 'River [hi]stories: Wahnabezee and the Urban Park Futures' project, facilitating community engagement events at Belle Isle, Detroit

JUNIOR ARCHITECT

Studio Recyclebin / India / 2020 - 2022

Worked with local governments and non-profit organizations to develop and implement urban scale proposals and strategies for projects such as the UN HRML Project in Kerala, Slum Rehabilitation in Chennai and art installations at Vellanikalpara Park in Trivandrum.

INTERN ARCHITECT

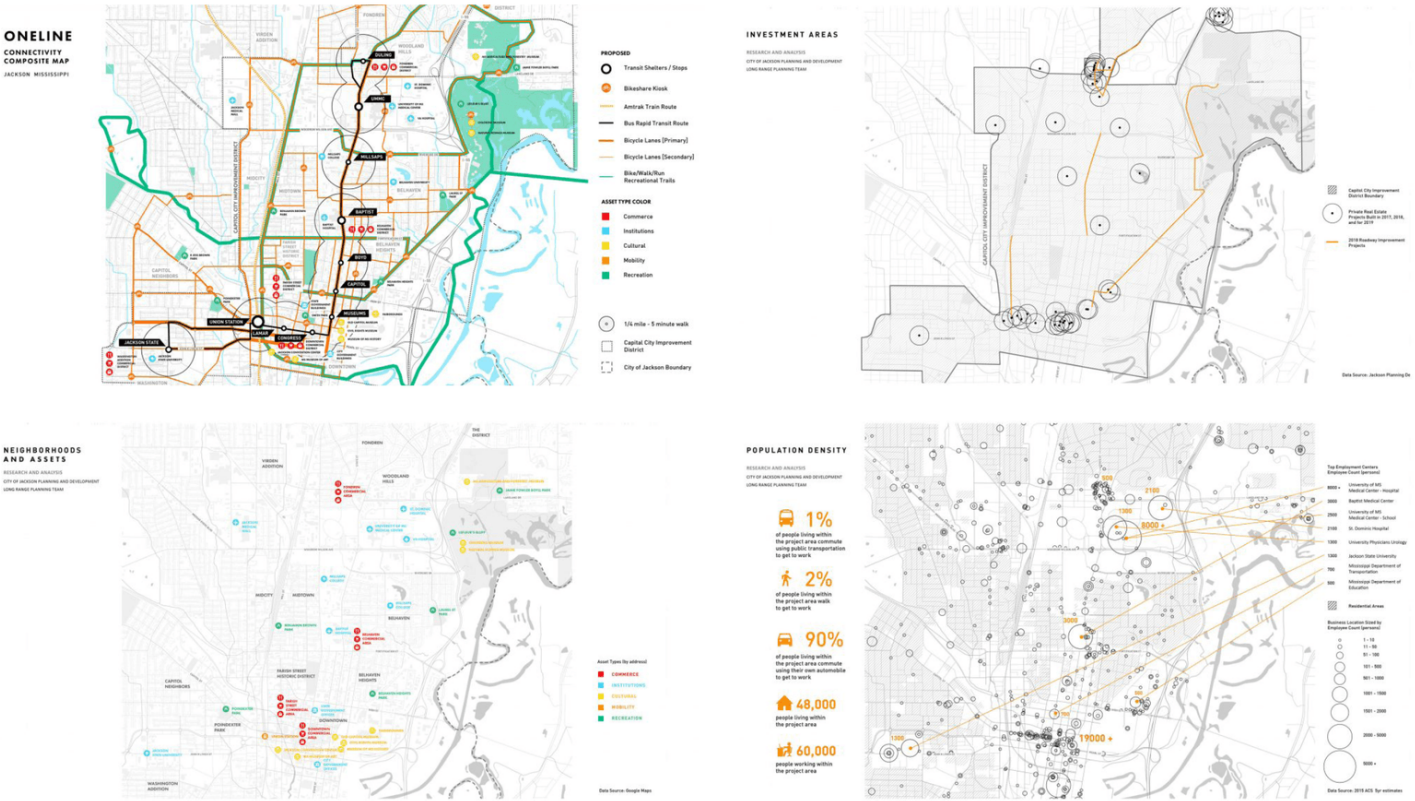
Lacasa Architects and Planners / U.A.E / 2020

Contributed to the design and development stages of hospitality, residential, and commercial projects as well as master planning for multi-use zoned islands in the Middle East.

INTERN ARCHITECT

Binesh Architects / India / 2017

Facilitated effective communication and client satisfaction by coordinating regular meetings with clients, actively discussing design changes, project budget, and material selection for various private residential projects.



ONELINE (click for more info on website)

ONELINE is a 5-mile multi modal corridor that aims to connect neighborhood nodes, institutions, and economic centers. The project is centered around a dynamic BRT (Bus Rapid Transit) system that extends from the Fondren area through Downtown to Jackson State University. This project will provide new infrastructure that prioritizes pedestrians, bicycles, bikeshare, carshare, electric scooters, and the bus rapid transit system. Smart street infrastructure is also deployed throughout the corridor which will include public WiFi, smart cameras, street lights, traffic signals, digital display panels.

PROJECT GRANT AWARD

[\\$1 Million Federal Transit Authority Planning Grant](#)

PROJECT ROLE

- Planning
- MASS mobility evaluation
- Grant Writer
- Designer

TRANSIT SHELTER MODEL M



X	X	X
X	X	X
X	X	X

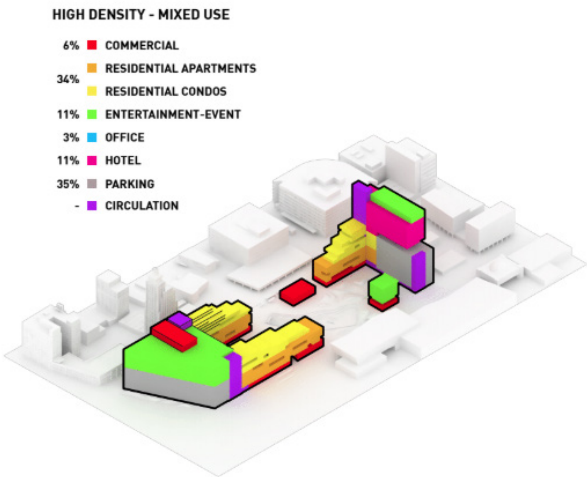


Downtown Design Dialogue
Master plan and
Community Engagement

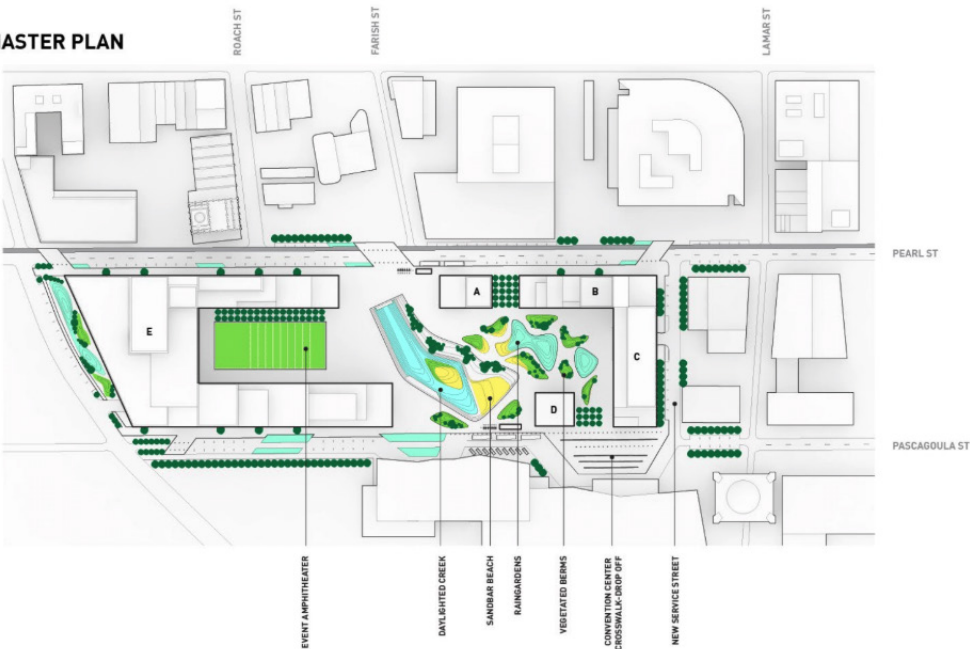
The purpose of the dialogue is to critically engage the public about the future of downtown redevelopment. This dialogue focuses on challenging the standard processes that the Planning Department, developers, and other stakeholders go through when developing a project. This dialogue is about downtown and how a 9 acre undeveloped parcel of land across from the Jackson Convention Complex can completely transform how Jackson’s downtown functions.

PROJECT ROLE

Project Manager
Community Engagement Coordinator
Designer



CONCEPTUAL MASTER PLAN

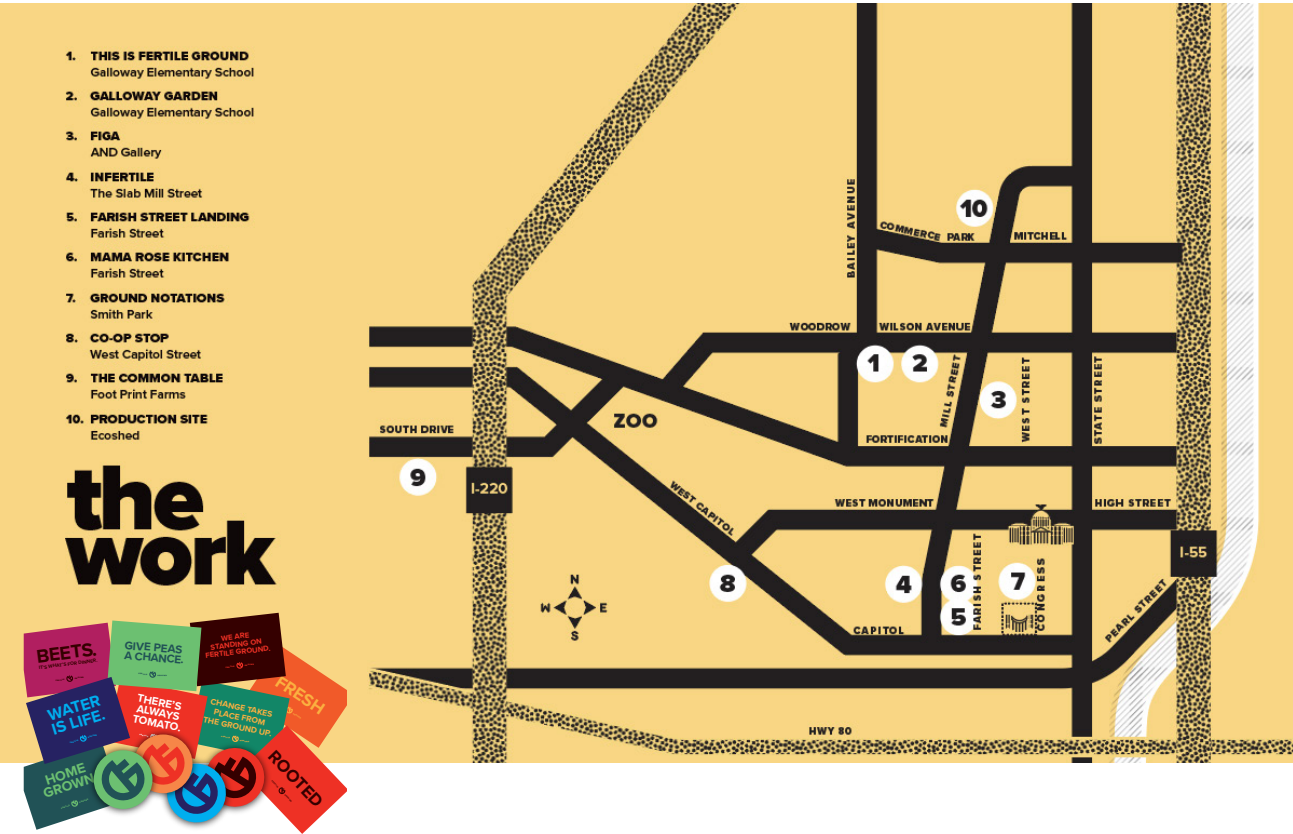


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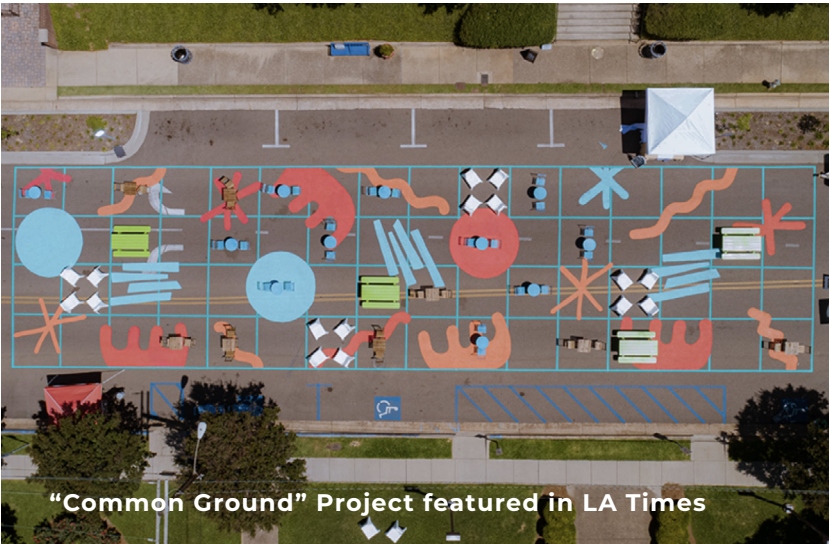
PROJECT ROLE

X	X	X
X	X	X
X	X	X



Fertile Ground

10 project installation located within a food desert. The sites are positioned along the linear path of the railroad in the center of the city that has historically been the segregation “redline” between West and East Jackson. The installations alternate from the east to the west side of the track aiming to bring the segregated communities together within public space to talk about food. The project grant proposal originally concentrated the artwork and activities at three sites but quickly expanded into ten sites after project team discussions. Installations are situated in a variety of urban typologies ranging from government spaces, elementary schools, industrial parks, neighborhoods, and the countryside.



PROJECT BUDGET

\$1 MILLION from Bloomberg Philanthropies

PROJECT ROLE

Grant Writer and Project Manager
Non-Profit Foundation Founder
Creative Director

PROJECT OBJECTIVE

To deploy installations and performances across areas of the city experiencing food access issues, exploring topics such as food sovereignty, nutrition, domestic hunger, and the agrarian landscape. Through tactical art and strategies, the project aimed to raise awareness and stimulate conversation about food access challenges and solutions within the community and state.

DELIVERABLE (link for more)

- 50+ project installations across the City
- [Project Evaluation](#)
- [Documentary: Awarded Southeast Emmy](#)
- [Project Booklet](#)
- Transportation Policy Development

X	X	X
X	X	X
X	X	X



Galloway Learning Garden
Part of Fertile Ground Project

The Galloway Learning Garden is an innovative outdoor classroom installed at Galloway Elementary School in Jackson, Mississippi, as part of a cross-disciplinary collaboration involving students and faculty from Mississippi State University’s landscape architecture, architecture, and graphic design programs. Recognized with an Honor Award for Student Collaboration by the American Society of Landscape Architects, the garden integrates five educational themes—math, science, art, health, and food education—into its design. The project features groundbreaking elements, including 3D-printed concrete benches, and was tailored to the school’s needs through extensive collaboration with educators and stakeholders. By reimagining outdoor learning spaces, the Galloway Learning Garden promotes hands-on, interdisciplinary education while addressing critical topics such as food access and sustainability. This project exemplifies the power of design to transform educational environments and foster community engagement.



PROJECT BUDGET

\$50,000

PROJECT ROLE

Grant Writer and Project Manager
Non-Profit Foundation Founder
Creative Director

PROJECT TEAM

MSU Architecture and Landscape School
MSU Graphic Design Program
Galloway Elementary

Award

Design award from the American Society of Landscape Architects

X	X	X
X	X	X
X	X	X



Ecoshed
Cultivating Creativity,
Nurturing Innovation in
Sustainable Spaces and Adaptive Reuse

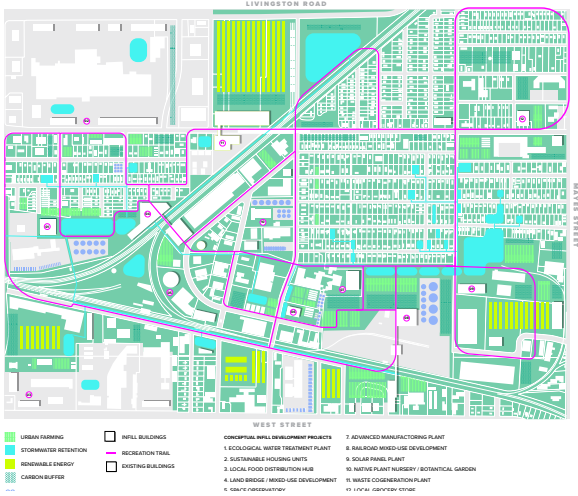
Ecoshed is a creative mixed-use development based in the Industry Park neighborhood of Jackson, Mississippi. The facility features shared workspace for entrepreneurs and offers indoor and outdoor event spaces. Our site exhibits urban farming, water recycling, passive energy systems, and other examples of green infrastructure. The dynamic design and combination of shared uses stimulates creativity, collaboration, and interdisciplinary thinking. We call this unique combination “creative infrastructure”.

PROJECT COST

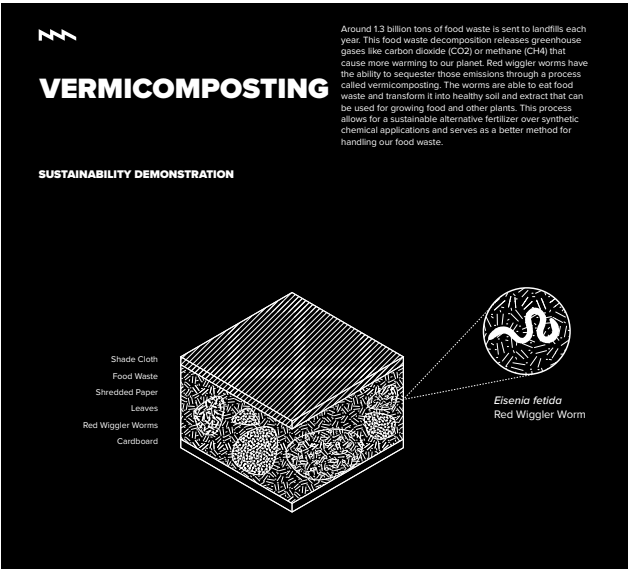
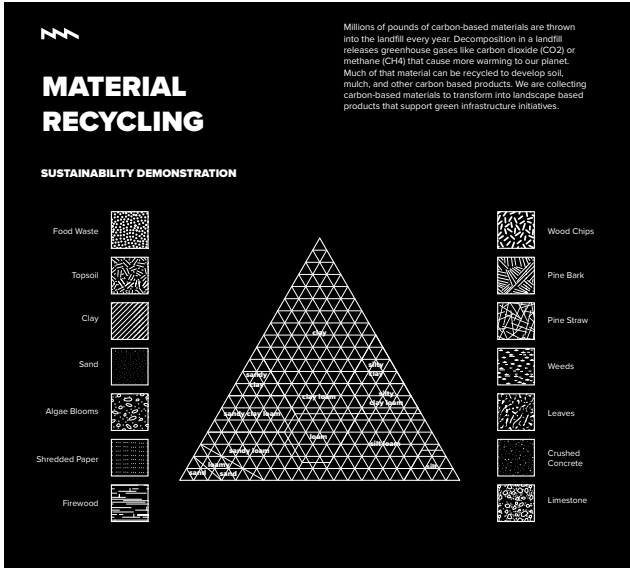
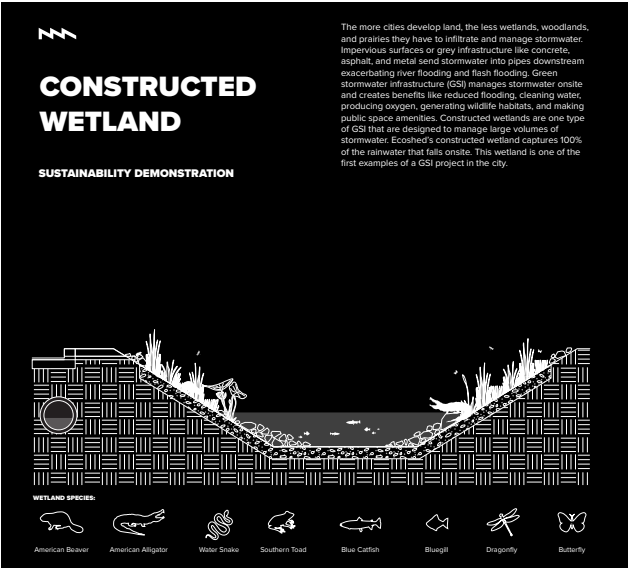
\$2.2 MILLION funded by angel investors

PROJECT ROLE

Co-designer, Co-owner, Co-operator



X	X	X
X	X	X
X	X	X



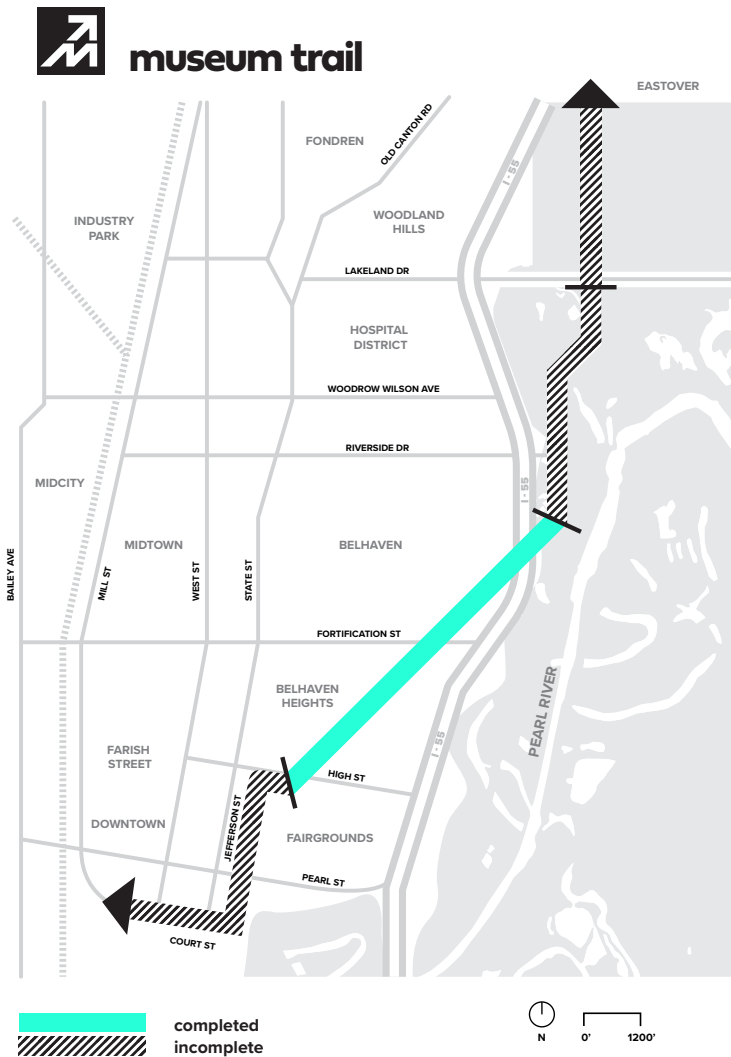
Ecoshed
Environmental Mapping and Educational Signage

This project signage for the Ecoshed integrates sustainability education with community engagement through thoughtfully designed signage and visual materials. These displays, created with durable digital prints on Alumilite, highlight topics such as green stormwater infrastructure, regenerative farming, vermicomposting, and energy-efficient building practices. By combining environmental mapping with engaging graphics, the project educates visitors on critical sustainability practices while promoting awareness of urban ecosystems. This initiative exemplifies how accessible design and educational tools can foster environmental stewardship and inspire sustainable community action.

PROJECT ROLE

Co-designer, Co-owner, Co-operator

X	X	X
X	X	X
X	X	X



Museum Trail

Multi-use trail in Jackson that connects the city to museums, parks, and communities

In 2021, we developed a conceptual development pitchdeck and brand package for the new Museum Trail in Jackson, Mississippi. Our goal was to communicate an energetic brand identity that can catalyze more public and private investment into the trail system. The materials we produced outlines where the trail is today, targets where investment is needed, and offers direction for future public space investment along the trail.

PROJECT ROLE

Planning
 MASS mobility evaluation
 Grant Writer- Received \$50,000 from AARP
 Brand Identity and Social Media



X	X	X
X	X	X
X	X	X

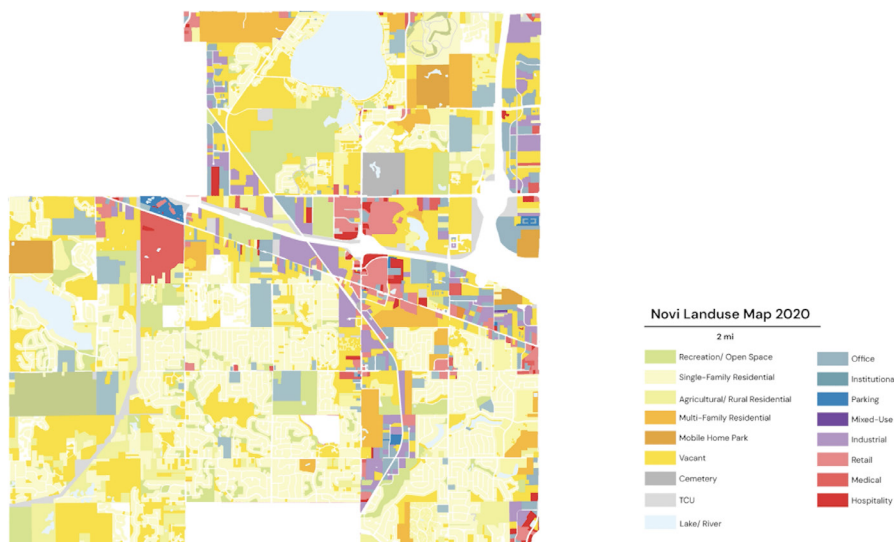
Project Approach

Building a Collaborative, Inclusive, and Actionable Vision for Novi 2050

In Novi, **“Quality of life...is the way of life.”** This guiding principle reflects the city’s commitment to fostering vibrant communities, excellent schools, and a thriving business environment. As Novi looks toward 2050, our approach is designed to honor this legacy while charting a bold and inclusive path forward. At 9XS Design, we believe the foundation of a successful community strategic plan lies in thoughtful collaboration, deep community engagement, and innovative yet pragmatic solutions. Our approach to the Novi 2050 Community Strategic Planning Process centers on three guiding principles: inclusivity, adaptability, and actionability.

Phase 1: Discovery and Contextual Understanding

We begin by immersing ourselves in Novi’s unique character, leveraging existing plans, demographic data, and community assets. Through stakeholder interviews, GIS mapping, and benchmarking comparable cities, we will define the core challenges and opportunities that Novi faces as it looks toward 2050. This phase lays the groundwork for an evidence-based and community-informed approach.



For example, the Novi Land Use Map 2020, created in collaboration with my students at the University of Michigan, serves as an illustrative tool to contextualize land use patterns, zoning, and spatial relationships across the city. This map demonstrates how visualizing data can highlight areas of opportunity and challenges, laying the groundwork for informed discussions and decision-making. Tools like this will guide our efforts in identifying trends, defining critical gaps, and setting the foundation for future scenarios.

Key activities in this phase include:

- **GIS Mapping and Analysis:** Using advanced mapping tools to visualize land use, demographics, and infrastructure data.
- **Benchmarking Peer Cities:** Examining best practices and comparable models for quality of life, sustainability, and growth.
- **Asset Mapping:** Identifying key cultural, natural, and economic assets that define Novi’s character.

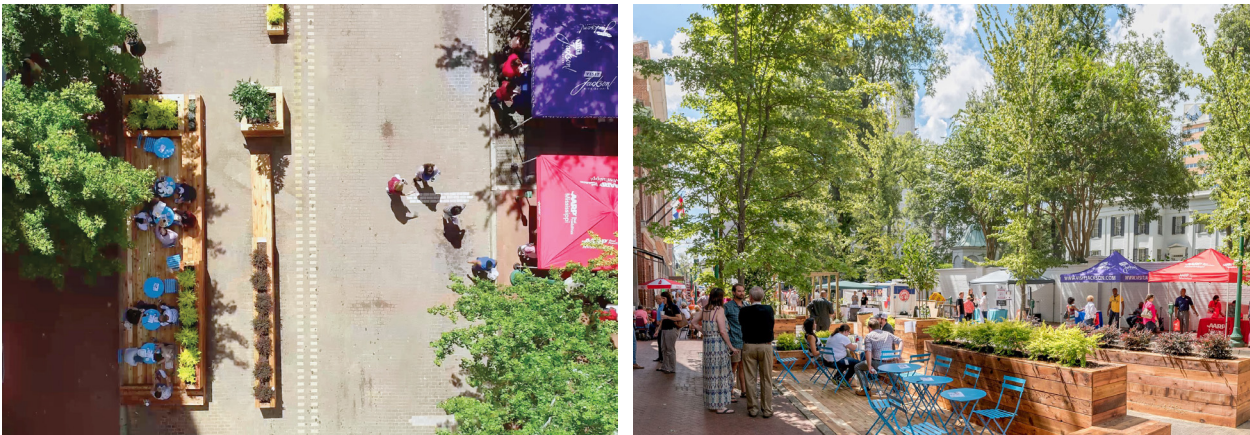
By emphasizing visualization and accessibility in this phase, we aim to ensure that all stakeholders can engage meaningfully with the data, laying a strong foundation for the collaborative and inclusive process that follows.

Project Approach

Phase 2: Visioning and Community Engagement

Engagement is at the heart of our process. We will design an engagement framework that prioritizes diverse participation and fosters a shared vision. Key tactics will include:

- Citywide Workshops to solicit ideas and priorities for Novi's future.
- Neighborhood Listening Sessions to understand hyperlocal concerns and aspirations.
- Interactive Digital Tools for data collection and input visualization.
- Pop-Up Engagement Events to meet residents where they are, ensuring accessibility and inclusivity.



Parking Day Event Funded by AARP allowed us to setup an event where we could interview residents about planning issues.

By fostering open dialogue, we aim to amplify community voices, especially from underrepresented groups, and ensure they directly inform the strategic vision.

Phase 3: Data-Driven Insights and Scenario Development

Using the insights gathered, we will analyze trends, identify critical gaps, and develop future scenarios. These scenarios will test policy ideas, resource allocations, and infrastructure investments, ensuring alignment with Novi's goals. Visualization tools and GIS mapping will help communicate these findings clearly and accessibly.

Phase 4: Strategic Planning and Implementation Framework

The strategic plan will translate vision into actionable strategies. This includes:

- Clear goals and objectives tied to community feedback and data insights.
- Performance metrics for tracking progress over time.
- Short-, Medium-, and Long-Term Action Plans to guide implementation and maintain momentum.
- Our focus will be on ensuring the plan is not only visionary but also achievable, providing a roadmap that can adapt to future challenges.

Phase 5: Communication and Plan Adoption

Finally, we will create an accessible, visually compelling final plan. Through presentations and public open houses, we will support the City of Novi in generating broad buy-in and excitement for Novi 2050.

Public Engagement Plan Overview

Setting clear public engagement goals is essential to ensure the process is inclusive, fosters trust and transparency, and empowers community members to actively shape Novi's future while building long-term buy-in and ownership of the strategic plan.

PRINCIPLES



Engage in Space

Meet residents in locations that are accessible, familiar, and welcoming.



Inclusive by Design

Prioritize equity by removing barriers and creating opportunities for everyone to participate meaningfully.



Close the Loop

Build trust by showing how public input shapes decisions and ensuring clear communication.



Collaborate to Amplify

Strengthen the process through partnerships with local organizations, civic groups, and trusted community leaders.

GOALS & METRICS

20+

Stakeholder and Technical Advisory Taskforce (TAT) Interviews and Listening Sessions

3

Keystone Citywide Workshops

10+

Pop-Ups and Smaller Engagement Events (Targeting Over 1,000 Interactions)

3

Community Surveys (Translated into 3+ Languages to Ensure Accessibility)

12+

Monthly Email Updates Sent to Stakeholders and Community Members

6+

Advisory Group Sessions To Guide and Refine Project Milestones

500+

Youth Participants Through School and Community Engagement Programs

5000+

Unique Website Visitors Engaging Through Interactive Tools and Updates

Public Engagement Plan

Goals of Engagement

- **Inclusive Participation:** Ensure all community segments, including underrepresented groups, have opportunities to participate meaningfully.
- **Transparency and Trust:** Build confidence in the process through clear communication and follow-through on feedback.
- **Informed Decision-Making:** Gather actionable insights that directly inform the strategic framework.
- **Sustained Involvement:** Maintain momentum and engagement throughout the process to foster long-term community buy-in.

Key Engagement Strategies

Community Visioning Workshops

Host three large-scale workshops to bring together residents, businesses, and civic leaders to explore Novi's future.

Activities:

- Vision boards and priority-setting exercises.
- Interactive discussions on challenges and opportunities.
- Live polling for real-time feedback.

Stakeholder and Technical Advisory Taskforce (TAT) Listening Sessions

Conduct 20+ sessions with key stakeholders, businesses, and organizations to guide and refine the plan.

Format: One-on-one interviews and group discussions.

Purpose: Gather specific insights and technical feedback throughout the process.

Pop-Up Engagement Events

Deploy mobile engagement activities at community hubs, such as parks, libraries, and local events.

Features:

- Interactive tools like feedback walls and mapping exercises.
- Casual setups to encourage participation from passersby.

Goal: Reach residents who may not attend formal meetings.

Community Surveys

Conduct three citywide surveys to gather input during key phases.

Focus Areas:

- June 2025: Community priorities and aspirations
- September 2025: Feedback on draft scenarios
- March 2026: Input on final strategies

Public Engagement Plan

Accessibility: Multilingual surveys to ensure inclusivity.

Online Engagement Platform

Create an online platform for ongoing participation and feedback.

Features:

- Surveys with interactive elements (e.g., priority ranking, mapping).
- A live dashboard showing engagement results and updates.

Goal: Attract 5,000+ unique visitors and ensure accessibility for those unable to attend in person.

Email Updates

Provide consistent updates to stakeholders and community members throughout the process.

Frequency: Monthly emails reflecting key milestones, upcoming events, and opportunities for feedback.

Phased Public Engagement Breakdown

PHASE

01

AWARENESS AND OUTREACH

- Launch the project through public announcements and outreach campaigns.
- Form the Stakeholder and Technical Advisory Taskforce (TAT).
- Begin committee planning for the engagement framework.

Deliverables:

- Launch materials (flyers, press releases, social media posts).
- Initial project website with the engagement timeline and resources.
- Committee planning session notes and TAT member list.

PHASE

02

LISTENING AND VISIONING

- Host Council Workshop #1 (May 2025) to align leadership on priorities.
- Launch Survey 1 (June 2025) to collect community aspirations and challenges.
- Conduct Community Workshop 1 (July 2025) for community visioning and idea generation.
- Organize Futurist Workshop #2 (July 2025) to introduce innovative ideas for Novi's future.
- Hold Stakeholder and TAT Listening Sessions to refine early insights.
- Conduct pop-up events in neighborhoods, targeting youth, businesses, cultural organizations, and the school district.
- Launch Survey 2 (August 2025) to establish metrics and performance indicators that allow for regular tracking of the city's progress toward achieving Novi 2050 goals.
- Host Council Workshop #2 (September 2025) to review thematic frameworks and draft scenarios.
- Conduct Community Workshop 2 (September 2025) for follow-up and scenario planning.
- Host Council Workshop #3 (December 2025) to review feedback and project updates.

Deliverables:

- Workshop summaries (visioning, thematic frameworks, metrics, and scenarios).
- Survey results report.
- Stakeholder session notes with actionable insights.
- Pop-up event feedback summaries.

PHASE

03

DATA-DRIVEN INSIGHTS AND SCENARIO DEVELOPMENT

- Develop thematic frameworks based on early input.
- Launch Survey 3 (March 2026) to collect community feedback on the draft scenarios.
- Continue Stakeholder and TAT Listening Sessions to validate strategies.
- Host a Board/Commission Chair Workshop to gather leadership input on the thematic frameworks.

Deliverables:

- Survey 3 results report.
- Stakeholder session notes highlighting refinements.
- Updated thematic frameworks based on community and leadership input.

Phased Public Engagement Plan

PHASE

04

DRAFT PLAN FEEDBACK

- Host final Stakeholder and TAT Listening Sessions for feedback on the draft plan.
- Update the online platform to share the draft plan for public review.

Deliverables:

- Draft plan summary and workshop materials.
- Finalized stakeholder session notes.
- Public-facing draft plan visualization on the project website.
- Review graphics and images meet City standards.
- Ensure goals and metrics aligned with City's vision.

PHASE

05

FINAL PLAN LAUNCH

- Host Workshop 3: a public event to unveil the final plan.
- Present the final plan to stakeholders and the broader community.
- Provide implementation tools and ongoing resources for tracking progress.

Deliverables:

- Final plan document (print and online versions).
- Public event materials (e.g., invitations, summary handouts).
- Final website update with adopted plan and tracking tools.

Timeline

The proposed 15-month timeline for the Novi 2050 Community Strategic Planning Process is structured into five key phases: Pre-Engagement Planning, Community & Stakeholder Engagement, Analysis and Draft Development, Draft Plan Feedback, and Final Plan Launch. This phased approach ensures a comprehensive and inclusive process, from establishing partnerships and gathering community input to delivering actionable strategies, draft reviews, and a finalized plan that reflects the collective vision of Novi's residents and stakeholders. The timeline demonstrates a commitment to sustained engagement, transparency, and alignment with the City's goals, with flexibility to adjust based on the City's evolving needs.

Task	Start	End	Duration (Months)
Phase 1: Pre-Engagement Planning			
Project Kickoff with City	03/01/2025		-
Plan community engagement process with the City	03/01/2025	03/31/2025	1
Identify Key Engagement Groups and Neighborhood Working Groups	04/01/2025	04/30/2025	1
Design & print flyers and digital outreach materials	04/01/2025	04/30/2025	1
Host first Steering Committee meeting	04/15/2025	04/30/2025	.5
Phase 2: Community & Stakeholder Engagement			
Host Council Workshop #1 to define project vision and priorities	05/05/2025		-
Design In-Person Engagement Activities (Pop-Ups, Open Houses)	05/01/2025	07/31/2025	3
Conduct Survey 1 to gather community input on priorities & challenges	06/01/2025	06/30/2025	1
Host Futurist Workshop to discuss forward-thinking themes	07/01/2025		-
Host Community Workshop 1	07/15/2025		-
Launch pop-up events, youth engagement, Workshop 2, and Survey 2	05/15/2025	09/30/2025	4.5
Host Council Workshop #2 to refine thematic frameworks	09/08/2025		-
Synthesize engagement learnings to guide framework development	10/01/2025	12/01/2025	2
Host Council Workshop #3 to finalize frameworks for the community	12/08/2025		-
Phase 3: Analysis and Draft Development			
Analyze Feedback for Actionable Recommendations	12/01/2025	01/31/2026	2
Develop Goals, Benchmarks, and Keystone Projects	02/01/2026	02/28/2026	1
Community Validation Forums and Survey 3	03/01/2026	03/31/2026	1
Phase 4: Draft Plan Feedback			
Share draft recommendations with advisory committees for review	04/01/2026	04/15/2026	.5
Share Feedback Integration Updates	04/15/2026		-
Make updates to the draft plan based on the feedback	04/16/2026	04/30/2026	.5
Phase 5: Final Plan Launch			
Finalize Writing and Design (Print Plan, Pamphlet, Web Versions)	05/01/2026	05/15/2026	.5
Present finalized plan to Steering Committee	05/15/2026		-
Host Workshop 3: a public event to unveil the final plan	05/20/2026		-
Plan adoption with City Council and distribution of final materials	05/30/2026		-

Timeline: Ongoing Activities with City

Bi-Weekly Meetings and Coordination

To ensure clear communication and efficient project management, bi-weekly meetings will be held with the City of Novi project leadership and other key stakeholders. These meetings will serve as a platform to review project progress, address emerging challenges, and align on upcoming tasks and deliverables. Meetings may be conducted in person or virtually.

Structure of Bi-Weekly Meetings:

Agenda Preparation: Agendas will be prepared and shared at least three business days before each meeting. This will provide participants adequate time to review the topics, supporting materials, and relevant data.

Key Discussion Points:

- Review of recent activities and accomplishments.
- Updates on community engagement efforts, including progress on surveys, workshops, and other activities.
- Discussion of feedback received and its integration into project deliverables.
- Planning for upcoming phases, milestones, and deliverables.
- Addressing any challenges or roadblocks requiring resolution.

These bi-weekly meetings will ensure transparency, maintain accountability, and foster strong collaboration between the project team and stakeholders throughout the project duration. By keeping all parties informed and engaged, we will stay on track to meet project goals efficiently and effectively.

Community Engagement Review and Vetting Process

To ensure alignment with the City of Novi's goals and priorities, all community engagement materials, strategies, and activities will be reviewed and vetted by city staff prior to dissemination. This process will ensure consistency in messaging, compliance with accessibility standards, and alignment with Novi's vision for inclusive and effective engagement.

Review and Vetting Process:

1. Development of Engagement Materials:

- Outreach materials, including flyers, surveys, social media posts, and visual aids, will be designed to reflect the project's objectives and meet accessibility standards.
- Materials will include translations into Novi's primary languages and ADA-compliant formatting for individuals with disabilities.

2. City Staff Review:

- Drafts of engagement materials and agendas will be submitted to city staff for review at least five business days before dissemination or use.
- Feedback from city staff will be promptly addressed to ensure materials meet expectations.

Timeline: Ongoing Activities with City

3. Final Approval:

- Revised materials will be resubmitted for final approval by city staff before distribution.
- Only materials that have been approved by the city will be shared with the community or used during engagement activities.

Quarterly Steering Committee Meetings

To ensure alignment with project goals and maintain stakeholder engagement, quarterly steering committee meetings will be held. These meetings will serve as a checkpoint for the overall strategic direction and progress of the project.

Structure of Quarterly Steering Meetings:

- Review of overall project progress and milestones.
- Updates on key engagement outcomes and findings.
- Discussions on major decisions and alignment with city priorities.
- Stakeholder input and guidance on upcoming phases.

Monthly Updates on Project Website and Social Media Platforms

To keep the public informed and engaged, the project website, social media, and Newsletter platforms will be updated monthly with the latest information. These updates will provide:

- Progress Reports: Summaries of activities completed, ongoing tasks, and upcoming milestones.
- Engagement Opportunities: Announcements of upcoming workshops, surveys, and pop-up events.
- Interactive Elements: Online tools, such as surveys, mapping exercises, and feedback forms, to facilitate virtual participation.
- Meeting Summaries: Highlights from bi-weekly meetings and quarterly steering committee discussions.

Project Line Item Budget

Project Planning and Design	Amount	Percentage
Phase 1: Pre-Engagement Planning	\$ 25,000	21%
Phase 2: Awareness and Outreach	\$ 27,500	23%
Phase 3: Community Engagement	\$ 30,000	25%
Phase 4: Feedback and Reporting	\$ 20,000	16%
Phase 5: Finalization	\$18,500	15%
Professional Services	\$ 121,000	-
Reimbursable	\$ 16,500	-
Total	\$ 137,500	

Reimbursable Breakdown	Amount	Percentage
Travel	\$ 5,000	30%
Materials for Engagement: (Printing, Design, Event Collateral)	\$ 4,500	27%
Translation Services: (as needed for multiple languages)	\$ 2,500	15%
Event Support: (Refreshments, Venue Rentals, etc.)	\$ 3,000	18%
Contingency	\$ 1,500	10%
Total	\$ 16,500	

Notes

Validity of Proposal: This budget is valid for 120 days from the proposal submission date or until a contract is executed, whichever comes first.

Flexibility: Elements of the scope and fee structure can be adjusted to better align with the City of Novi's needs or budget constraints.

Payment Schedule

We propose the following milestone-based payment schedule:

- 15% upon contract execution
- 20% upon completion of Phase 2
- 30% upon completion of Phase 3
- 25% upon completion of Phase 4
- 10% upon project finalization and adoption

Prioritizing Inclusive Solutions

Commitment to Diversity and Representation

As a Detroit-based, woman- and minority-owned business, 9XS Design is deeply committed to fostering diversity in every aspect of our work. We prioritize inclusive hiring practices and partnerships, seeking out collaborators, consultants, and community members from underrepresented groups. By ensuring diverse representation, we aim to bring a wide range of perspectives and experiences to our projects, enriching the outcomes and fostering equity.

Equity-Centered Design and Community Engagement

Equity is at the core of our design process. We develop projects that center on community needs, ensuring that traditionally marginalized voices are heard and represented. Through tools like accessible visualizations and 3D-printed models, we create tangible ways for all stakeholders—regardless of background or technical expertise—to engage meaningfully. This approach ensures that our designs are collaborative, inclusive, and directly responsive to the people they serve.

Pro Bono Commitment

In line with our mission to give back to the communities that inspire us, 9XS Design allocates 10% of our annual work hours to pro bono projects in Detroit. These initiatives focus on creating equitable, impactful design solutions for underserved neighborhoods. Whether through tactical urbanism, public art, or community space improvements, we strive to support grassroots organizations and amplify the voices of those who might otherwise go unheard.

Continuous Learning and Accountability

We are dedicated to ongoing growth and reflection in our DEI efforts. Our team participates in regular training and workshops to stay informed about equity and inclusion in design. At the end of each year, we evaluate our DEI initiatives by assessing the diversity of our partnerships, the impact of our pro bono work, and the inclusivity of our community engagement strategies. By sharing these reflections transparently, we hold ourselves accountable and continually strive to improve.

Inclusive Design Practices

9XS Design is committed to creating spaces that are inclusive and accessible to all. This includes ensuring compliance with ADA standards, designing for multi-generational use, and addressing the needs of diverse cultural communities. By integrating universal design principles, we aim to craft environments that are welcoming and usable for everyone, regardless of age, ability, or background.

Partnerships and Local Empowerment

We actively seek to collaborate with local businesses, non-profits, and community organizations that align with our values. These partnerships are designed to empower local voices and ensure that resources and opportunities stay within the community. By prioritizing partnerships with small, minority-owned businesses and Detroit-based organizations, we amplify local talent and create a ripple effect of impact.

Education and Youth Engagement

We believe in cultivating the next generation of designers, planners, and leaders. Through workshops, internships, and mentorship programs, we engage with youth in Detroit and beyond. These programs introduce young people to the fields of urban design and architecture, empowering them with skills, knowledge, and confidence to shape their communities.

Sustainability as a Tool for Equity

Sustainability is an integral part of our DEI approach. We recognize that environmental justice is inseparable from equity, and we design systems and spaces that address disparities in access to green infrastructure, clean air, and safe public spaces. By focusing on resilience and regeneration, we strive to create designs that benefit underserved communities and promote long-term environmental equity.

References

1. Mukesh Kumar (mukeshk@wacotx.gov)

Connection: Worked together at the City of Jackson Planning Department.

Shared Projects: Collaborated on various significant projects, including:

- Fertile Ground: A city-wide public art initiative.
- Oneline: A multimodal corridor project integrating transit and urban design.
- PARK(ing) Day: A tactical urbanism project to reclaim urban spaces for public use.
- Downtown Design Study: Focused on long-range urban planning and design.

Key Strengths: Deeply engaged in community-driven initiatives and long-range planning.

2. Kim Dokes (kim@dokesdesign.com)

Connection: Collaborated on Detroit Public Schools Community District (DPSCD) Facility Master Plans.

Shared Projects:

FMP 1 & FMP 5: Worked specifically on engagement strategies, emphasizing community input and integration into school facility planning.

Key Strengths: Partnership focused on engaging stakeholders and implementing impactful community design solutions.

3. Ahmed Beasley (ahmed.beasley@plantemoran.com)

Connection: Professional relationship through Plante Moran Realpoint during work on the DPSCD Facility Master Plan (FMP 1).

Role: Served as a key point of contact for Realpoint's involvement in the planning and implementation process.

Key Strengths: Collaboration on large-scale, multi-phase planning projects, emphasizing efficiency and stakeholder alignment.

THANK YOU

9XS Design

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Visit Our Site

Thank you for considering our proposal. We appreciate the opportunity to contribute to this transformative project and are excited about the prospect of creating a vibrant cultural legacy for the community. To learn more about our firms please visit our websites for more images and projects.
