



PROPOSAL

City of Foley

Strategic Plan

(RFP #COF-050423)

BerryDunn

2211 Congress Street
Portland, ME 04102-1955
207.541.2200

Seth Hedstrom, Project Principal
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Michelle Kennedy, Project Manager and Facilitator
mkennedy@berrydunn.com

Proposal Due Date:
May 4, 2023 before 2:00 p.m.



May 4, 2023

City of Foley, Alabama
Attention: Logan Eberly, Purchasing Agent
407 East Laurel Avenue
Foley, Alabama 36535

Dear Logan Eberly:

On behalf of Berry, Dunn, McNeil, & Parker, LLC (BerryDunn), I am pleased to submit this proposal in response to the City of Foley's (the City's) Request for Proposals (RFP) #COF-050423 for a Strategic Plan. 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 120 calendar days from the proposal deadline of May 4, 2023.

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

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

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



Our decades of relevant strategic planning and organizational development experience

BerryDunn's Local Government Practice Group is dedicated to serving the public sector and provides a wide variety of services, informing and enhancing our ability to support our clients with strategic planning initiatives. We are skilled at facilitating, communicating, and visioning. In fact, our proposed project manager and facilitator, Michelle Kennedy, has nearly three decades of strategic planning experience and facilitated more than 60 strategic planning processes over the course of her career, and our proposed project principal, Seth Hedstrom, has overseen nearly all our firm's strategic planning engagements. This broad exposure to the strategic planning process gives us an in-depth understanding of the importance in establishing trust and credibility with stakeholders; effectively engaging said stakeholders in the planning process to build buy-in for a common vision and commitment to action; and developing first-time strategic plans through a process that is both easy and enjoyable.



Our strong facilitation approach and communication skills

We understand that reaching consensus can be difficult as individuals seek to advocate for the needs and concerns they believe in most and that represent the interests of their constituencies. Our approach is based in the Institute of Cultural Affairs' (ICA) Technology of Participation® (ToP®) facilitation methodology and designed to meet the needs of stakeholders, including elected and appointed officials, managers, frontline staff, and the public. Throughout the process, we will

keep stakeholders informed and involved, helping to ensure the City's strategic planning effort is inclusive of all perspectives and reflects a shared vision.



Our highly skilled project team and their commitment to local government

All our project team members exclusively serve local government clients and the majority have prior experience working in local government organizations prior to joining BerryDunn. Having served dozens of local governments across the country, our team has a deep understanding of these organizations, as well as the opportunities and constraints associated with the public-sector landscape. In addition to those proposed on our project team, we are proud to offer a pool of over 300 consulting resources who can be pulled as needed to benefit the City's requested work effort. These resources have robust experience and expertise gained from public service as well as consulting projects in our firm's specialized practices, such as community development and planning; justice and public safety; parks, recreation, and libraries; health and community services; among others. Collectively, we are well-qualified to support the City as it seeks to improve, transform, and innovate, as well as achieve its desired future state.



Our approach is proven, flexible, and scalable

We take pride in our ability to meet clients where they are and customize our approach to reflect the size, complexity, and scope of the engagement. Of note to the City, we have experience serving small- to mid-size organizations, many of which were new to developing strategic plans. As active partners in the process, we are sure to guide our clients every step of the way as they seek to preserve who they are and achieve their North Star visions. We are excited at the prospect of serving as co-author to the City's first strategic plan and hope for the chance to be partner on this initiative.

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

Sincerely,

A handwritten signature in black ink, appearing to read 'S Hedstrom', with a long horizontal flourish extending to the right.

Seth Hedstrom, PMP®, LSSGB, Principal

2211 Congress Street, Portland, ME 04102-1955

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

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Bid Name: Strategic Plan for the City of Foley
Requisition # COF-050423

REQUEST FOR PROPOSAL FORM

PROPOSALS TO BE OPENED AT: **2:00 P.M. CST**
DATE: **Thursday, May 4, 2023**

Sealed proposals will be received by the City of Foley, Alabama, at its office in Foley until the above date and time, and then opened as soon thereafter as practicable.

Logan Eberly
Purchasing Agent

SPECIFICATIONS: SEE ATTACHED

If you are unable to furnish an item as specified and desire to offer a substitute, give full description of the item. No errors will be corrected after proposals are opened. Substitutions will be treated as "approved equivalent or equal" which is discussed in paragraph 1.05 of the proposal documents **GENERAL CONDITIONS**. Please refer to Paragraph 1.05 prior to offering any substitutions. No prices shall include State or Federal Excise Tax. Tax exemption certificates furnished upon request. City reserves the right to accept or reject all proposals or any portion thereof.

We are in a position to complete this project per the attached proposals within 90 calendar days after receipt of notice to proceed. Any attachment hereto is made and becomes a part of this inquiry and must be signed by the company.

I hereby affirm I have not been in any agreement or collusion among companies or prospective companies in restraint of freedom of competition, by agreement to bid at fixed price or to refrain from bidding, or otherwise. I am not currently engaged in, nor will engage in, any boycott of a person or entity based in or doing business with a jurisdiction with which the State of Alabama can enjoy open trade.

THIS BID MUST BE NOTARIZED
Sworn to and subscribed before me
this the 4th day of
May, 2023.

Daphne Edwards
NOTARY PUBLIC

BIDS MADE OUT IN PENCIL WILL NOT
BE ACCEPTED. **DAPHNE EDWARDS**
NOTARY PUBLIC
State of Maine
My Commission Expires
January 5, 2030

FIRM: Berry, Dunn, McNeil & Parker, LLC

BY: [Signature]
Signature accepted in ink only

STREET ADDRESS: 2211 Congress Street

CITY: Portland STATE: Maine

TERMS: Net 30
FOR CASH PAYMENT WITHOUT REGARD TO
DATE OF REMITTANCE

ALL COMPANIES MUST USE OUR PROPOSAL FORM(S). NAME AND ADDRESS, BID NAME, OPENING DATE AND TIME MUST BE PRINTED ON THE OUTSIDE OF THE SEALED ENVELOPE. EACH PROPOSAL MUST BE IN SEPARATE ENVELOPES.

2. Company Information Page



Bid Name: Strategic Plan for the City of Foley
Requisition # COF-050423

COMPANY INFORMATION:

Company Name:		
Submitted By:		
Mailing Address:		
Telephone Number:		
E-Mail Address:		
Ethics Disclosure:	Are you a City of Foley Appointed Official? Are you a City of Foley Employee? Are you the spouse of a City of Foley Appointed Official or Employee?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No

ADDENDUM ACKNOWLEDGEMENT:

Company acknowledges receipt of the following addendums and has incorporated the requirements of such addendums into this Request for Proposal.

(List all addendums issued for this proposal.)

No.	Date

No.	Date

No.	Date

No.	Date

No.	Date

No.	Date

3. Company Experience and Qualifications

3.1 Firm Overview

BerryDunn is a nationally recognized independent management and IT consulting firm focused on inspiring organizations to transform and innovate. As a Limited Liability Company formed in 1974 with 54 principals, 29 owners, and nine office locations, **we have experienced sustained growth throughout our 49-year history.**

We employ more than 800 staff members—including more than 300 in our Consulting Services Team. From extensive project experience for more than **400 state, local, and quasi-governmental agencies**, our team brings valuable perspectives to every engagement. Additionally, our team has prior experience serving state and local government agencies, providing them with an in-depth understanding of government operations, staffing needs, budgetary constraints, and the business processes required to provide necessary services to the internal divisions and the constituents the City serves.

Our firm provides a full range of professional services that supports our ability to complete tasks outlined by the City. These include:

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

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

Figure 1: Local Government Practice Group Specialization



Commitment to Diversity, Equity, and Inclusion (DEI)

BerryDunn has advanced community, diversity, and empathy in a workplace where everyone is respected, seen, and heard. We foster DEI by committing to identifying institutional and systemic barriers. We engage in meaningful conversation to learn and grow continuously, and we embrace diverse perspectives and backgrounds regardless of race, ethnicity, age, sexual orientation, gender identity or expression,

religion, or disability. Our CEO Council on Diversity, Equity, Inclusion, Belonging, and Access (DEIBA Council) leads meaningful progress toward being a diverse, equitable, and inclusive organization.

As a firm, we have put practices and tools in place to help ensure we have a culture of DEI within our firm and the community. We offer DEI trainings for our employees that are developed and executed by our DEIBA Council. Further, we partner with organizations and nonprofits in our community headquarters of Portland, Maine to assist in DEI initiatives in the surrounding area. This includes local efforts to combat racism and create a more equitable future for women, the LGBTQIA+ community, and other marginalized minority groups.



In terms of the City's requested work effort, BerryDunn shares the City's focus on and commitment to DEI. That said, the City can expect that we will exhibit care and respect for others, build trust with the City's stakeholders, establish mutual buy-in for the process, and learn from each other.

3.2 Experience

Experience with 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. Of note, we have assisted the City of Mobile, AL with a parks and recreation cost recovery and policy development, as well the Mobile County Health Department with a variety of projects, including an IT strategic plan and strategic plan update. Our full list of clients in the State is provided below:

- Alabama Alcoholic Beverage Control Board
- Alabama Department of Corrections
- City of Hoover
- City of Mobile
- Mobile County Health Department

Organizational Development

BerryDunn has been providing services like those requested for more than 30 years. Through this experience, we have assisted with a variety of related services, including:

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

Strategic Planning

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

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

4. References

Below, we provide reference information for several strategic planning clients who can speak to the quality and satisfaction we deliver on comparable engagements. **Physical work samples can be found in Appendix B.**



City of Groveland, Florida

Timothy Maslow, Community Development Director
101 East Broad Street, Groveland, FL 34736
352-250-7578 | timothy.maslow@groveland-fl.gov

The City engaged BerryDunn to help address the changing needs of its residents, businesses, and visitors and develop a citywide strategic plan to help navigate its inevitable growth. The City sought collaboration in its approach to information-gathering and recommendations development. We provided a mix of independent and partnered activities, including reviewing existing documents and data; conducting interviews; developing a customized Social Pinpoint site; and facilitating a community open house. We worked with the City's steering committee to facilitate strategic planning workshops. We are currently working with department leadership to develop growth, revenue, and budget forecasting projections; prioritize and sequence capital investments and services; and forecast the City's personnel organizational chart prior to developing the Growth, Capital Investment, Services Prioritization, and Staffing Report.

QR Code to Strategic Plan



QR Code to Social Pinpoint Site



City of Cooper City, Florida

Joseph Napoli, City Manager
9090 Southwest 50th Place, Cooper City, FL 33328
954-424-4300 | jnapoli@groveland-fl.gov

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

QR Code to Social PinPoint Site





City of Milton, Georgia

Steve Krokoff, City Manager
2006 Heritage Walk, Milton, GA 30004
678-242-2571 | steven.krokoff@cityofmiltonga.us

BerryDunn concluded the City's strategic planning process. Phases in this process included project initiation and planning, an Environmental Scan, community visioning, and strategic plan development. Most of this project took place remotely and utilized tools, such as Social Pinpoint, to boost information sharing and community engagement efforts. The City Council Strategic Planning Retreat and team building with executive leadership were conducted on-site. Also part of this engagement was an emphasis on preservation related to the City's reputable high quality of life and current and anticipated growth. The most challenging aspect of this engagement was increasing the racial and ethnic diversity of the City's community engagement effort. Milton is becoming a more diverse community, and the City wanted to engage the participation of residents who have been underrepresented or not invited to participate in the past. BerryDunn worked with the City to identify new individuals and organizations and conducted persistent outreach efforts to help make sure these voices were an integral part of the planning process. The final plan has an updated vision and mission for the City, a new set of organizational values developed by the Council and City staff, strategic priorities, current and future state descriptions of each priority, strategic goals, short-term objectives, and outcome measures. The City Council adopted the plan in March 2021.

QR Code to Strategic Plan



QR Code to Social Pinpoint Site



City of Wausau, Wisconsin

Katie Rosenberg, Mayor
407 Grant St, Wausau, WI 54403
715-621-6800 | katie.rosenberg@ci.wausau.wi.us

BerryDunn was selected by the City of Wausau to conduct its strategic planning process with a strong focus on DEI, as well as community engagement and involvement. We helped the City develop a strategic planning steering committee—identifying members' desired attributes, activities each may take part in, and the level of effort required to support the work effort. We also reviewed existing documents and data; developed a customized Social Pinpoint site; developed and distributed stakeholder survey; conducted interviews, listening sessions, and community forums; and facilitated strategic planning workshops. As a result of these efforts, we developed the initial draft of the City's strategic plan. We then worked with department leadership to develop performance measures prior to presenting the final draft of the strategic plan to City Council for adoption in March 2022.

QR Code to Strategic Plan



QR Code to Social Pinpoint Site



City of St. Charles, Illinois

Heather McGuire, City Administrator
2 E Main St, Saint Charles, IL 60174
630-377-4422 | hmcguire@stcharlesil.gov

The City of St. Charles selected BerryDunn to lead its strategic planning process. The City had previously developed strategic plans and was ready to plan for its next five-year time frame. In addition to the sun setting on its prior plan, the City was driven by the need to regain focus after the pandemic and recent significant staffing changes within its administration. The City recognizes that a new strategic plan would play an important role in making collective progress toward a shared vision for the City's future. The BerryDunn team led a highly engaging, inclusive, and participatory process with the City's leadership, staff, community, and other stakeholders. Leveraging various information-gathering strategies, we developed a detailed Environmental Scan to guide strategic planning sessions and develop key components of the City's plan. Adopted in January 2023, the City of St. Charles' Strategic Plan is composed of a mission, vision, values, strategic goals, objectives, and performance metrics and outcome measures. We are currently leading the City through implementation planning efforts to help ensure consistent progress is made toward the City's desired future.

QR Code to Strategic Plan



QR Code to Social Pinpoint Site



5. Project Team

5.1 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 2 describes the organizational structure of our project team, followed by a listing of project staff.

Figure 2: Project Team Organizational Structure



5.2 Roles, Responsibilities, and Qualifications

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



Seth Hedstrom, PMP®, LSSGB | Project Principal

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

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

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



Michelle Kennedy, Prosci® CCP, ODCC | Project Manager and Facilitator

Michelle is a manager in our Local Government Practice Group and has more than 30 years of government-sector management and consulting experience. She is an expert in organizational development, including strategic and business planning, leadership development and executive coaching, organizational assessments, OCM, program evaluation, business process improvement, and performance measurement. Michelle has provided consulting services and project leadership for state and local government agencies throughout the United States. She is a strong facilitator and is certified in several related areas including in the ICA ToP® facilitation methodology. Michelle has facilitated the development and writing of strategic plans for 60 public-sector organizations.

As the **project manager and facilitator**, Michelle will:

- Work directly with the City and engage in managing the work
- Serve as the City's primary point of contact
- Participate in meetings with leadership
- Lead our work and perform day-to-day project management and staff oversight
- Develop and maintain the Project Work Plan and Schedule
- Facilitate public forums
- Help develop the Final Foley Strategic Plan
- Help develop the Performance Management Plan
- Conduct project closeout activities



Karen Whichard, MPA | Facilitator

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

As the **facilitator**, Karen will:

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



Maddison Powers Spencer, MPA | Research Analyst

Maddison is a consultant in our Local Government Practice Group. She has firsthand experience serving in the public sector and is familiar with the unique aspects of government operations. Notably, she has been involved in various governmental initiatives, including those related to DEI; sustainability; and process and project analysis and management. Maddison has notable government experience, where she developed hands-on government skills, as well as research and analysis. Prior to joining BerryDunn, Maddison supported numerous comparable initiatives for public-sector organizations, including work for the City of Covington, Georgia, and the Town of Rolesville, North Carolina.

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

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

Additional Resources

The City will also benefit from our broader team of more than 300 consultants should the need arise. Our highly experienced resources representing just some of the many specialty areas we have across local government departments are listed below and on the following page.



Michele Weinzeil, Ed.D., Prosci® CCP | Justice and Public Subject Matter Expert (SME)

Michele is a manager in our Local Government Practice Group. She has over 27 years of experience in the public sector. Her background includes more than 17 years as a chief of police for three different Minnesota police departments and several years serving as a SME, 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.



Jason Genck, MPA, CPRP | Parks, Recreation, and Libraries SME

Jason is a senior consultant 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, nonprofits, and special districts.



Fred Turnier, MPA, AICP, Prosci® CCP | Community Development SME

Fred is a manager in our Local Government Practice Group. He has more than 25 years of experience working with local government agencies and extensive experience assisting public-sector entities with project management and development services, business process improvement, fee and cost recovery analysis, system design and implementation, and policy analysis and formation. He focuses in the areas of community development, planning, building, inspections, code enforcement, business licensing, housing and homeless issues, land management, utilities, and infrastructure planning.



Jesse Myott, MA | Finance SME

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



James Mickle, CPSI, CPRP | DEI SME

James is a senior consultant 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.

6. Approach and Work Plan

6.1 Methodologies

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 towards 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.



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

A strategic plan is a living document that defines the organization's reason for being. It establishes a clear and compelling vision; sets measurable objectives and lays out the desired impact on and value added to



Inclusive Participation

Invites and sustains engagement of all members of a group



Teamwork and Collaboration

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



Individual/Group Creativity

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



Action and Ownership

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



Reflection and Learning

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

entire communities—residents, business, employees, and other stakeholders; and helps set a direction and focus and assists in aligning resources to accomplish strategic objectives.

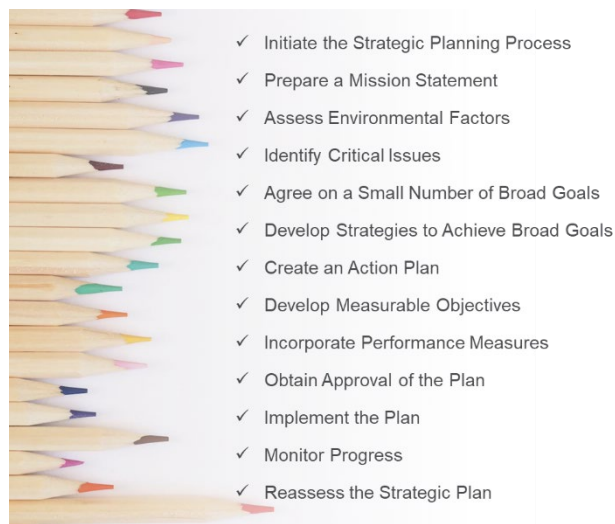
Having a clear, concrete strategic direction will help keep the City on track and focused on what is important when challenges, setbacks, and unanticipated events occur. It also helps ensure decisions, policies, plans, programs, and processes are designed through the lenses of stewardship of resources,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

Achieving Consensus and Quickly Moving Groups to Action

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

creates a clear intention, helping members of the group align with one another and reach consensus. Structured participation encourages the values shown to the left.

GFOA Best Practices



Complying with GFOA Best Practices

Throughout our years of experience and dozens of successfully completed projects, we have adopted strategies to help ensure a streamlined and efficient strategic planning process. Among these are GFOA best practices that encourage frequent communicating, thorough environmental assessing, and measurable action planning. GFOA best practices are foundational to our process for developing strategic plans and preparing the final document. We have a member of our strategic planning team who is a former local government finance director; she will apply a checklist of GFOA criteria to the final draft to help ensure Foley's completed strategic plan complies with these defined best practices.

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 more than 60 public-sector entities and system-level plans involving multiple levels of government, jurisdictions, and agencies. Our clients use these plans to drive budget decisions, execute strategies, and publish the results to communicate with stakeholders and the public.

Focusing on DEI

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

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

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



Please share your ideas and suggestions for the future Lauderhill.

Business and Economy	Parks and Open Spaces	Infrastructure and Services	Effective Government	Public Safety	Quality of Life
----------------------	-----------------------	-----------------------------	----------------------	---------------	-----------------

Can anybody Recommend a park with good spaces to start soccer practices for young children ? I am a soccer coach with over 10 years of experience with children from all ages. I would like to start offering classes to children from 5 years and up. I am willing to provide a few classes for free to children that are interested and maybe workout something with the city to make this a program available to the community. Please reffer if anybody can recommend parks in Lauderhill. Thank you in advance.

Start a discussion

00 Parks and Open Spaces | 2 months ago Like Dislike

It would be great to have a weekend trolley that stops at strategic locations, including areas with local businesses, Lauderhill Sports Park, and the Arts Center, so residents can get to know other parts of and people in their city. I think the brief survey should ask what part of Lauderhill we live in to get an accurate understanding of which topics need attention and where. I look forward to getting involved in sustainable development efforts.

Start a discussion

00 Quality of Life | 5 months ago Like Dislike

More street lights on 31st ave and 16st. Clearing to trees close to light wires

Start a discussion

00 Infrastructure and Services | 5 months ago Like Dislike

BCT needs better management, the bus don't run on time, to the published schedule, some are not clean and the wait time on some routes are too long, e.g. #81 and 22.

Start a discussion

00 Infrastructure and Services | 5 months ago Like Dislike

Our police department need improved traffic

Effectively Engaging the Public

We will utilize several strategies to effectively engage and collect data and information from the public, including developing communications, conducting interviews and focus groups, 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 a 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.

6.2 Work Plan

BerryDunn strives to be flexible when it comes to development and execution of an effective work plan. We understand that no two projects are exactly alike and believe that **one of the primary reasons we**

have been successful with similar projects is our willingness to be flexible in adapting to our clients' unique needs.

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



Below and on the following pages, we provide details of our work plan to conduct the City's project effectively and efficiently as described in Figure 3.

Phase 0: Project Initiation and Management

0.1 Prepare for and conduct an initial virtual project planning meeting. Upon conducting background research to gain more familiarity with the City, we will prepare for and conduct an initial project planning with the City Manager, as well as the City's project team to identify project milestones and expectations for stakeholder engagement in the strategic planning process. We will introduce key team members, clarify project goals and objectives, identify known project constraints, and refine dates and/or tasks, as appropriate. We recognize the City's desire to complete the strategic planning process in three months and will work closely with the City to help ensure a smooth and efficient schedule. We will also 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 Foley Strategic Plan. These discussions will help us to refine a Project Work Plan and Schedule.

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

Examples include:

- Key performance metric data
- Program descriptions and data
- Past internal and external assessments
- Past strategic plans and associated material
- The City's most recent bi-annual National Citizen Survey(s)
- Other existing planning and policy documents, organizational charts, staffing, and budgeting details

Phase 0: Project Initiation and Management

- Data from any previous community and stakeholder engagement efforts that are relevant to development of the strategic plan
- Previous surveys of City stakeholders and staff
- Demographic, economic, and community data and forecasted trends from the U.S. Census Bureau, the U.S. Bureau of Labor Statistics, American Community Survey, U.S. Department of Education, Centers for Disease Control and Prevention, the Opportunity Index, and other state and local data sources

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

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

▲ Deliverable 1 – Project Work Plan and Schedule

0.4 Develop communications and messaging. We will develop communications and messaging to build awareness for the process, its intended outcomes, and opportunities for stakeholders to get involved, as well as to keep City Council, City leadership, staff, and community stakeholders informed about the strategic planning process. We will review messaging and communications with the City's project team before finalizing and working with the City's project team to distribute them.

0.5 Develop questions and interview guides. To understand how the City's elected officials, senior leadership, staff, and other key stakeholders view the current environment and issues of strategic importance—and to gather information for the Environmental Scan and Strategic Analysis—our project team will develop questions and protocols to guide individual interviews, as well as the strategic planning sessions we facilitate. We will review the questions and protocols with the City's project team to build consensus and solicit feedback before updating them to final.

Some of the topics we will address are:

- What current and/or emerging trends have the biggest influence on where efforts and resources should be focused?
- What are the potential scenarios that the City should be prepared for in the coming 2, 5, and 10 years?
- What is the most pressing problem or concern facing the City?
- What is the City's long-term vision for the lives of its residents?
- What are the most important and/or critical community needs the City can address in the near future?

Phase 0: Project Initiation and Management

- How effective is the City's existing service delivery and programming in meeting the needs of the needs of residents and the community? What service gaps exist, and how should they be addressed?
- What opportunities could more effectively leverage the City's existing plans, efforts, resources, and capacity to achieve better outcomes for residents and businesses in terms of programming, service delivery, and investments across the community?
- What does the City desire to address or accomplish on behalf of its residents and community businesses?
- What obstacles or challenges could get in the way of the City successfully pursuing its strategic direction and implementing its plan?

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

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

▲ Deliverable 2 – Weekly Project Status Meetings

Phase 1: Community and City Assessment

1.1 Coordinate stakeholder engagement logistics. We will coordinate with the City to schedule and handle logistics for community engagement activities, including interviews, focus groups, meetings-in-a-box, community meetings, and pop-up events. All logistics will be managed through a DEI lens, helping ensure we create accessible involvement, promote participation, and build trust with participants in our activities.

1.2 Facilitate a project orientation. We will facilitate a project orientation with the City Council and City leadership to discuss the strategic planning process, our approach, methods for gathering information, and intended outcomes. This orientation will also serve as an opportunity for participants to ask questions and gain additional clarity surrounding the project.

1.3 Develop the City's Social Pinpoint site. We will utilize tools and technology that will help to encourage collaboration with the City and its stakeholders. One of these tools, a virtual engagement platform called Social Pinpoint, will be customized to encourage community engagement in the strategic planning process and to gain broad stakeholder input that will be used to inform development of the Final Foley 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, City stakeholders will have access to an external survey, idea wall, and other engagement tools that will help gather information related to the City's current environment and the community's desired vision for the City's future. This will also include a customized online community survey.

Phase 1: Community and City Assessment

1.4 Review and analyze City-provided documents and data. We will review and analyze the documents and data requested in Task 0.2. This will be used to help us produce an Environmental Scan and Strategic Analysis and that will inform engagement activities.

1.5 Conduct focus groups with City stakeholders. We will conduct three focus group meetings with the City's identified stakeholders, including those involved in economic development, commerce and health, and environmental stewardship and quality of life, as well as municipal and City elected officials, including but not limited to the Mayor, City Council, and others. These focus groups will be guided by previously developed questions and protocols and will be used to thoroughly review and assess services and the needs of the community. Upon completion, we will provide written documentation summarizing findings. Working with these diverse stakeholder groups, we will help ensure alignment and cohesion for the City's strategic direction, as well as generate excitement, promote consensus and buy-in, and encourage participation and involvement in the process.

1.6 Conduct individual interviews. We will conduct individual interviews with the Mayor, City Council, and other designated elected and appointed officials. These interviews will be guided by previously developed questions and protocols and will be used to thoroughly review and assess services and the needs of the community. Upon completion, we will provide written documentation summarizing findings. Working with these diverse stakeholder groups, we will help ensure alignment and cohesion for the City's strategic direction, as well as generate excitement, promote consensus and buy-in, and encourage participation and involvement in the process.

1.7 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, and leadership and stakeholder interviews and focus groups 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 public forums and strategic planning sessions. The presentation will provide an overview of the City's current environment; a detailed strengths, weaknesses, opportunities, and threats analysis; and discovery outcomes. This will be presented to the City's project team to solicit input and gain consensus.

▲ Deliverable 3 – Draft Environmental Scan and Strategic Analysis

1.8 Design, prepare for, and conduct public forums. Using information gathered to-date and the ICA ToP® facilitation methodology, we will design a public forum format that is structured to educate, inform, and engage all participants in developing a vision for the City. We will make creative use of digital applications to help ensure forums are engaging and effective. Once prepared, we will facilitate two public forums to gather perspectives and ideas from the community. We will use the Draft Environmental Scan and Strategic Analysis to educate the community about the current environment of the City.

1.9 Update the Draft Environmental Scan and Strategic Analysis to final. We will incorporate public forum outcomes in our Draft Environmental Scan and Strategic Analysis, review it with the City's project team, and solicit feedback before updating it to final. The Updated Environmental Scan and 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. The Updated Environmental Scan and Strategic Analysis will also include a strengths, weaknesses, opportunities, and threats analysis that will assist in the development of the Final Foley Strategic Plan.

Phase 1: Community and City Assessment

▲ Deliverable 4 – Updated Environmental Scan and Strategic Analysis

Phase 2: Core Planning

2.1 Develop the meeting design and agendas for Strategic Planning Sessions 1 and 2. We will design and develop agendas for Strategic Planning Sessions 1 and 2. Each session's design and agenda will guide strategic planning progress and will include a presentation of the Updated Environmental Scan and 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 vision and key results. We will review the meeting designs and agendas for each session with the City's project team before updating them to final.

2.2 Facilitate Strategic Planning Session 1. Strategic Planning Session 1 will focus on developing the City's vision, mission, values, strategic priorities, and goals with the City Council. This session will be guided by the previously developed meeting design and agenda, as well as the Environmental Scan and 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's project team and plan for next steps.

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

2.4 Develop the Initial Foley Strategic Plan Draft. We will develop the Initial Foley Strategic Plan Draft in an agreed-upon format for the final document. This plan document will include an executive summary, as well as a comprehensive, detailed plan that identifies the City's shared vision, mission, guiding principles, strategic priorities, goals, objectives, and performance measures. It will also include a description of the strategic plan development process, resulting action steps and benchmarks to help the City achieve its mission, and a plan and timeline for carrying out the strategic plan internally and externally. It will also include a description of the strategic plan development process, as well as the development of a one-page "Plan at a Glance" document, that can serve as a stand-alone high-level summary of the Strategic Plan. The "Plan at a Glance" will follow the design and branding of the full strategic plan and include mission and vision statements, guiding principles/values, strategic priorities, strategic goals, and a link to the website where the full Plan can be reviewed or downloaded. We will review this draft with the City's project team to solicit feedback, as well as create opportunities for select stakeholders to review and provide feedback, before updating to final.

▲ Deliverable 5 – Initial Foley Strategic Plan Draft

2.5 Facilitate a review session for the Final Foley Strategic Plan. After reviewing the Initial Foley Strategic Plan Draft with the City's project team, we will present the draft to the City Council in a work session. This will serve as an opportunity for the Council to provide feedback and make any final changes.

Phase 2: Core Planning

Upon incorporating edits, we will develop a graphically designed, Final Foley Strategic Plan for final approval and adoption.

▲ *Deliverable 6 – Final Foley Strategic Plan*

Phase 3: Performance Management and Training

3.1 Prepare for and conduct training and workshops. We will prepare for and conduct training and workshops designed to develop performance targets, as well as a performance management system that supports City leadership and staff to effectively implement the Final Foley Strategic Plan. This will give the City the tools to intentionally and sustainably carry out the plan in a way that produces long-term results.

3.2 Draft and finalize a Performance Management Plan. We will develop a Performance Management Plan to support progress monitoring and plan implementation evaluation. This will serve as a guiding tool for the City to reference during the long-term implementation of the Final Foley Strategic Plan and will include recommendations for improving performance in service delivery and customer relations. We will present the draft Performance Management Plan with City leadership before updating to final.

▲ *Deliverable 7 – Performance Management Plan*

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

Anticipated Schedule

On the following page, we highlight our proposed project schedule for the City's requested work effort. We are prepared to complete the project within 90 calendar days after notice to proceed, which is anticipated to be no later than June, per the City's RFP. We are happy to adjust this schedule to best accommodate the City's needs, as appropriate.

	Month 1	Month 2	Month 3
Phase 0			
Phase 1			
Phase 2			
Phase 3			

7. Pricing

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

In the table below we have included an estimated travel expense allocation. We will utilize our hybrid methodologies through collaborative planning with the City to limit travel expense to the City as appropriate. We will invoice actual travel expenses as incurred.

Table 1: Cost by Project Phase

Phase	Cost
Phase 0: Project Initiation and Management	\$14,900
Phase 1: Community and City Assessment	\$20,700
Phase 2: Core Planning	\$21,400
Phase 3: Performance Management and Training	\$12,600
<i>Travel expense estimate</i>	\$9,500
Total Fixed-Fee Cost (including travel expense estimate)	\$79,100

Table 2 presents our project team members' hourly rates for further review and consideration.

Table 2: Project Team Member Hourly Rates

Project Team Member	Role	Hourly Rate
Seth Hedstrom, Principal	Project Principal	\$500
Michelle Kennedy, Manager	Project Manager and Facilitator	\$360
Karen Whichard, Senior Consultant	Facilitator	\$260
Maddison Powers-Spencer, Consultant	Research Analyst	\$190

8. Proposal Checklist

Bid Name: Strategic Plan for the City of Foley
Requisition # COF-050423



Proposal Checklist

Items that should be included in Proposal:

- Request for proposal form (PDF page 2)
- Company information page (PDF page 3)
- Company Experience and Qualifications
- Details of how the three phases of the project will be accomplished along with the incorporation of GFOA Best Practices for the Establishment of Strategic Plans.
- Listing of the company projects/customers similar in size and scope to the services described in the RFP. This list must include the name, address, telephone, and email address of the client contract administrator. If applicable, please list examples of services rendered in the State of Alabama.
- Pricing should be broken down by item should include:
 - Overall Cost Estimate
 - Hourly / Daily Rates
 - Estimated Travel Expenses
- Proposal checklist (PDF page 7)
- Proof of E-Verify Documentation in the form of signed Memorandum of Understanding (MOU)
- Submit one original proposal and a copy of the proposal on a USB

This list is not intended to be all inclusive, but a guide to creating your proposal.

Company: _____

Submitted By: _____

Address: _____

Phone: _____



Company ID Number: 166359

THE E-VERIFY MEMORANDUM OF UNDERSTANDING FOR EMPLOYERS

ARTICLE I PURPOSE AND AUTHORITY

The parties to this agreement are the Department of Homeland Security (DHS) and the Berry, Dunn, McNeil & Parker (Employer). The purpose of this agreement is to set forth terms and conditions which the Employer will follow while participating in E-Verify.

E-Verify is a program that electronically confirms an employee's eligibility to work in the United States after completion of Form I-9, Employment Eligibility Verification (Form I-9). This Memorandum of Understanding (MOU) explains certain features of the E-Verify program and describes specific responsibilities of the Employer, the Social Security Administration (SSA), and DHS.

Authority for the E-Verify program is found in Title IV, Subtitle A, of the Illegal Immigration Reform and Immigrant Responsibility Act of 1996 (IIRIRA), Pub. L. 104-208, 110 Stat. 3009, as amended (8 U.S.C. § 1324a note). The Federal Acquisition Regulation (FAR) Subpart 22.18, "Employment Eligibility Verification" and Executive Order 12989, as amended, provide authority for Federal contractors and subcontractors (Federal contractor) to use E-Verify to verify the employment eligibility of certain employees working on Federal contracts.

ARTICLE II RESPONSIBILITIES

A. RESPONSIBILITIES OF THE EMPLOYER

1. The Employer agrees to display the following notices supplied by DHS in a prominent place that is clearly visible to prospective employees and all employees who are to be verified through the system:
 - a. Notice of E-Verify Participation
 - b. Notice of Right to Work
2. The Employer agrees to provide to the SSA and DHS the names, titles, addresses, and telephone numbers of the Employer representatives to be contacted about E-Verify. The Employer also agrees to keep such information current by providing updated information to SSA and DHS whenever the representatives' contact information changes.
3. The Employer agrees to grant E-Verify access only to current employees who need E-Verify access. Employers must promptly terminate an employee's E-Verify access if the employer is separated from the company or no longer needs access to E-Verify.

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4. The Employer agrees to become familiar with and comply with the most recent version of the E-Verify User Manual.

5. The Employer agrees that any Employer Representative who will create E-Verify cases will complete the E-Verify Tutorial before that individual creates any cases.

a. The Employer agrees that all Employer representatives will take the refresher tutorials when prompted by E-Verify in order to continue using E-Verify. Failure to complete a refresher tutorial will prevent the Employer Representative from continued use of E-Verify.

6. The Employer agrees to comply with current Form I-9 procedures, with two exceptions:

a. If an employee presents a "List B" identity document, the Employer agrees to only accept "List B" documents that contain a photo. (List B documents identified in 8 C.F.R. § 274a.2(b)(1)(B)) can be presented during the Form I-9 process to establish identity.) If an employee objects to the photo requirement for religious reasons, the Employer should contact E-Verify at 888-464-4218.

b. If an employee presents a DHS Form I-551 (Permanent Resident Card), Form I-766 (Employment Authorization Document), or U.S. Passport or Passport Card to complete Form I-9, the Employer agrees to make a photocopy of the document and to retain the photocopy with the employee's Form I-9. The Employer will use the photocopy to verify the photo and to assist DHS with its review of photo mismatches that employees contest. DHS may in the future designate other documents that activate the photo screening tool.

Note: Subject only to the exceptions noted previously in this paragraph, employees still retain the right to present any List A, or List B and List C, document(s) to complete the Form I-9.

7. The Employer agrees to record the case verification number on the employee's Form I-9 or to print the screen containing the case verification number and attach it to the employee's Form I-9.

8. The Employer agrees that, although it participates in E-Verify, the Employer has a responsibility to complete, retain, and make available for inspection Forms I-9 that relate to its employees, or from other requirements of applicable regulations or laws, including the obligation to comply with the antidiscrimination requirements of section 274B of the INA with respect to Form I-9 procedures.

a. The following modified requirements are the only exceptions to an Employer's obligation to not employ unauthorized workers and comply with the anti-discrimination provision of the INA: (1) List B identity documents must have photos, as described in paragraph 6 above; (2) When an Employer confirms the identity and employment eligibility of newly hired employee using E-Verify procedures, the Employer establishes a rebuttable presumption that it has not violated section 274A(a)(1)(A) of the Immigration and Nationality Act (INA) with respect to the hiring of that employee; (3) If the Employer receives a final nonconfirmation for an employee, but continues to employ that person, the Employer must notify DHS and the Employer is subject to a civil money penalty between \$550 and \$1,100 for each failure to notify DHS of continued employment following a final nonconfirmation; (4) If the Employer continues to employ an employee after receiving a final nonconfirmation, then the Employer is subject to a rebuttable presumption that it has knowingly

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employed an unauthorized alien in violation of section 274A(a)(1)(A); and (5) no E-Verify participant is civilly or criminally liable under any law for any action taken in good faith based on information provided through the E-Verify.

b. DHS reserves the right to conduct Form I-9 compliance inspections, as well as any other enforcement or compliance activity authorized by law, including site visits, to ensure proper use of E-Verify.

9. The Employer is strictly prohibited from creating an E-Verify case before the employee has been hired, meaning that a firm offer of employment was extended and accepted and Form I-9 was completed. The Employer agrees to create an E-Verify case for new employees within three Employer business days after each employee has been hired (after both Sections 1 and 2 of Form I-9 have been completed), and to complete as many steps of the E-Verify process as are necessary according to the E-Verify User Manual. If E-Verify is temporarily unavailable, the three-day time period will be extended until it is again operational in order to accommodate the Employer's attempting, in good faith, to make inquiries during the period of unavailability.

10. The Employer agrees not to use E-Verify for pre-employment screening of job applicants, in support of any unlawful employment practice, or for any other use that this MOU or the E-Verify User Manual does not authorize.

11. The Employer must use E-Verify for all new employees. The Employer will not verify selectively and will not verify employees hired before the effective date of this MOU. Employers who are Federal contractors may qualify for exceptions to this requirement as described in Article II.B of this MOU.

12. The Employer agrees to follow appropriate procedures (see Article III below) regarding tentative nonconfirmations. The Employer must promptly notify employees in private of the finding and provide them with the notice and letter containing information specific to the employee's E-Verify case. The Employer agrees to provide both the English and the translated notice and letter for employees with limited English proficiency to employees. The Employer agrees to provide written referral instructions to employees and instruct affected employees to bring the English copy of the letter to the SSA. The Employer must allow employees to contest the finding, and not take adverse action against employees if they choose to contest the finding, while their case is still pending. Further, when employees contest a tentative nonconfirmation based upon a photo mismatch, the Employer must take additional steps (see Article III.B. below) to contact DHS with information necessary to resolve the challenge.

13. The Employer agrees not to take any adverse action against an employee based upon the employee's perceived employment eligibility status while SSA or DHS is processing the verification request unless the Employer obtains knowledge (as defined in 8 C.F.R. § 274a.1(l)) that the employee is not work authorized. The Employer understands that an initial inability of the SSA or DHS automated verification system to verify work authorization, a tentative nonconfirmation, a case in continuance (indicating the need for additional time for the government to resolve a case), or the finding of a photo mismatch, does not establish, and should not be interpreted as, evidence that the employee is not work authorized. In any of such cases, the employee must be provided a full and fair opportunity to contest the finding, and if he or she does so, the employee may not be terminated or suffer any adverse employment consequences based upon the employee's perceived employment eligibility status

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(including denying, reducing, or extending work hours, delaying or preventing training, requiring an employee to work in poorer conditions, withholding pay, refusing to assign the employee to a Federal contract or other assignment, or otherwise assuming that he or she is unauthorized to work) until and unless secondary verification by SSA or DHS has been completed and a final nonconfirmation has been issued. If the employee does not choose to contest a tentative nonconfirmation or a photo mismatch or if a secondary verification is completed and a final nonconfirmation is issued, then the Employer can find the employee is not work authorized and terminate the employee's employment. Employers or employees with questions about a final nonconfirmation may call E-Verify at 1-888-464-4218 (customer service) or 1-888-897-7781 (worker hotline).

14. The Employer agrees to comply with Title VII of the Civil Rights Act of 1964 and section 274B of the INA as applicable by not discriminating unlawfully against any individual in hiring, firing, employment eligibility verification, or recruitment or referral practices because of his or her national origin or citizenship status, or by committing discriminatory documentary practices. The Employer understands that such illegal practices can include selective verification or use of E-Verify except as provided in part D below, or discharging or refusing to hire employees because they appear or sound "foreign" or have received tentative nonconfirmations. The Employer further understands that any violation of the immigration-related unfair employment practices provisions in section 274B of the INA could subject the Employer to civil penalties, back pay awards, and other sanctions, and violations of Title VII could subject the Employer to back pay awards, compensatory and punitive damages. Violations of either section 274B of the INA or Title VII may also lead to the termination of its participation in E-Verify. If the Employer has any questions relating to the anti-discrimination provision, it should contact OSC at 1-800-255-8155 or 1-800-237-2515 (TDD).

15. The Employer agrees that it will use the information it receives from E-Verify only to confirm the employment eligibility of employees as authorized by this MOU. The Employer agrees that it will safeguard this information, and means of access to it (such as PINS and passwords), to ensure that it is not used for any other purpose and as necessary to protect its confidentiality, including ensuring that it is not disseminated to any person other than employees of the Employer who are authorized to perform the Employer's responsibilities under this MOU, except for such dissemination as may be authorized in advance by SSA or DHS for legitimate purposes.

16. The Employer agrees to notify DHS immediately in the event of a breach of personal information. Breaches are defined as loss of control or unauthorized access to E-Verify personal data. All suspected or confirmed breaches should be reported by calling 1-888-464-4218 or via email at E-Verify@dhs.gov. Please use "Privacy Incident – Password" in the subject line of your email when sending a breach report to E-Verify.

17. The Employer acknowledges that the information it receives from SSA is governed by the Privacy Act (5 U.S.C. § 552a(i)(1) and (3)) and the Social Security Act (42 U.S.C. 1306(a)). Any person who obtains this information under false pretenses or uses it for any purpose other than as provided for in this MOU may be subject to criminal penalties.

18. The Employer agrees to cooperate with DHS and SSA in their compliance monitoring and evaluation of E-Verify, which includes permitting DHS, SSA, their contractors and other agents, upon

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reasonable notice, to review Forms I-9 and other employment records and to interview it and its employees regarding the Employer's use of E-Verify, and to respond in a prompt and accurate manner to DHS requests for information relating to their participation in E-Verify.

19. The Employer shall not make any false or unauthorized claims or references about its participation in E-Verify on its website, in advertising materials, or other media. The Employer shall not describe its services as federally-approved, federally-certified, or federally-recognized, or use language with a similar intent on its website or other materials provided to the public. Entering into this MOU does not mean that E-Verify endorses or authorizes your E-Verify services and any claim to that effect is false.

20. The Employer shall not state in its website or other public documents that any language used therein has been provided or approved by DHS, USCIS or the Verification Division, without first obtaining the prior written consent of DHS.

21. The Employer agrees that E-Verify trademarks and logos may be used only under license by DHS/USCIS (see [M-795 \(Web\)](#)) and, other than pursuant to the specific terms of such license, may not be used in any manner that might imply that the Employer's services, products, websites, or publications are sponsored by, endorsed by, licensed by, or affiliated with DHS, USCIS, or E-Verify.

22. The Employer understands that if it uses E-Verify procedures for any purpose other than as authorized by this MOU, the Employer may be subject to appropriate legal action and termination of its participation in E-Verify according to this MOU.

B. RESPONSIBILITIES OF FEDERAL CONTRACTORS

1. If the Employer is a Federal contractor with the FAR E-Verify clause subject to the employment verification terms in Subpart 22.18 of the FAR, it will become familiar with and comply with the most current version of the E-Verify User Manual for Federal Contractors as well as the E-Verify Supplemental Guide for Federal Contractors.

2. In addition to the responsibilities of every employer outlined in this MOU, the Employer understands that if it is a Federal contractor subject to the employment verification terms in Subpart 22.18 of the FAR it must verify the employment eligibility of any "employee assigned to the contract" (as defined in FAR 22.1801). Once an employee has been verified through E-Verify by the Employer, the Employer may not create a second case for the employee through E-Verify.

a. An Employer that is not enrolled in E-Verify as a Federal contractor at the time of a contract award must enroll as a Federal contractor in the E-Verify program within 30 calendar days of contract award and, within 90 days of enrollment, begin to verify employment eligibility of new hires using E-Verify. The Employer must verify those employees who are working in the United States, whether or not they are assigned to the contract. Once the Employer begins verifying new hires, such verification of new hires must be initiated within three business days after the hire date. Once enrolled in E-Verify as a Federal contractor, the Employer must begin verification of employees assigned to the contract within 90 calendar days after the date of enrollment or within 30 days of an employee's assignment to the contract, whichever date is later.

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b. Employers enrolled in E-Verify as a Federal contractor for 90 days or more at the time of a contract award must use E-Verify to begin verification of employment eligibility for new hires of the Employer who are working in the United States, whether or not assigned to the contract, within three business days after the date of hire. If the Employer is enrolled in E-Verify as a Federal contractor for 90 calendar days or less at the time of contract award, the Employer must, within 90 days of enrollment, begin to use E-Verify to initiate verification of new hires of the contractor who are working in the United States, whether or not assigned to the contract. Such verification of new hires must be initiated within three business days after the date of hire. An Employer enrolled as a Federal contractor in E-Verify must begin verification of each employee assigned to the contract within 90 calendar days after date of contract award or within 30 days after assignment to the contract, whichever is later.

c. Federal contractors that are institutions of higher education (as defined at 20 U.S.C. 1001(a)), state or local governments, governments of Federally recognized Indian tribes, or sureties performing under a takeover agreement entered into with a Federal agency under a performance bond may choose to only verify new and existing employees assigned to the Federal contract. Such Federal contractors may, however, elect to verify all new hires, and/or all existing employees hired after November 6, 1986. Employers in this category must begin verification of employees assigned to the contract within 90 calendar days after the date of enrollment or within 30 days of an employee's assignment to the contract, whichever date is later.

d. Upon enrollment, Employers who are Federal contractors may elect to verify employment eligibility of all existing employees working in the United States who were hired after November 6, 1986, instead of verifying only those employees assigned to a covered Federal contract. After enrollment, Employers must elect to verify existing staff following DHS procedures and begin E-Verify verification of all existing employees within 180 days after the election.

e. The Employer may use a previously completed Form I-9 as the basis for creating an E-Verify case for an employee assigned to a contract as long as:

- i. That Form I-9 is complete (including the SSN) and complies with Article II.A.6,
- ii. The employee's work authorization has not expired, and
- iii. The Employer has reviewed the Form I-9 information either in person or in communications with the employee to ensure that the employee's Section 1, Form I-9 attestation has not changed (including, but not limited to, a lawful permanent resident alien having become a naturalized U.S. citizen).

f. The Employer shall complete a new Form I-9 consistent with Article II.A.6 or update the previous Form I-9 to provide the necessary information if:

- i. The Employer cannot determine that Form I-9 complies with Article II.A.6,
- ii. The employee's basis for work authorization as attested in Section 1 has expired or changed, or
- iii. The Form I-9 contains no SSN or is otherwise incomplete.

Note: If Section 1 of Form I-9 is otherwise valid and up-to-date and the form otherwise complies with

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Article II.C.5, but reflects documentation (such as a U.S. passport or Form I-551) that expired after completing Form I-9, the Employer shall not require the production of additional documentation, or use the photo screening tool described in Article II.A.5, subject to any additional or superseding instructions that may be provided on this subject in the E-Verify User Manual.

g. The Employer agrees not to require a second verification using E-Verify of any assigned employee who has previously been verified as a newly hired employee under this MOU or to authorize verification of any existing employee by any Employer that is not a Federal contractor based on this Article.

3. The Employer understands that if it is a Federal contractor, its compliance with this MOU is a performance requirement under the terms of the Federal contract or subcontract, and the Employer consents to the release of information relating to compliance with its verification responsibilities under this MOU to contracting officers or other officials authorized to review the Employer's compliance with Federal contracting requirements.

C. RESPONSIBILITIES OF SSA

1. SSA agrees to allow DHS to compare data provided by the Employer against SSA's database. SSA sends DHS confirmation that the data sent either matches or does not match the information in SSA's database.

2. SSA agrees to safeguard the information the Employer provides through E-Verify procedures. SSA also agrees to limit access to such information, as is appropriate by law, to individuals responsible for the verification of Social Security numbers or responsible for evaluation of E-Verify or such other persons or entities who may be authorized by SSA as governed by the Privacy Act (5 U.S.C. § 552a), the Social Security Act (42 U.S.C. 1306(a)), and SSA regulations (20 CFR Part 401).

3. SSA agrees to provide case results from its database within three Federal Government work days of the initial inquiry. E-Verify provides the information to the Employer.

4. SSA agrees to update SSA records as necessary if the employee who contests the SSA tentative nonconfirmation visits an SSA field office and provides the required evidence. If the employee visits an SSA field office within the eight Federal Government work days from the date of referral to SSA, SSA agrees to update SSA records, if appropriate, within the eight-day period unless SSA determines that more than eight days may be necessary. In such cases, SSA will provide additional instructions to the employee. If the employee does not visit SSA in the time allowed, E-Verify may provide a final nonconfirmation to the employer.

Note: If an Employer experiences technical problems, or has a policy question, the employer should contact E-Verify at 1-888-464-4218.

D. RESPONSIBILITIES OF DHS

1. DHS agrees to provide the Employer with selected data from DHS databases to enable the Employer to conduct, to the extent authorized by this MOU:

a. Automated verification checks on alien employees by electronic means, and

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- b. Photo verification checks (when available) on employees.
2. DHS agrees to assist the Employer with operational problems associated with the Employer's participation in E-Verify. DHS agrees to provide the Employer names, titles, addresses, and telephone numbers of DHS representatives to be contacted during the E-Verify process.
3. DHS agrees to provide to the Employer with access to E-Verify training materials as well as an E-Verify User Manual that contain instructions on E-Verify policies, procedures, and requirements for both SSA and DHS, including restrictions on the use of E-Verify.
4. DHS agrees to train Employers on all important changes made to E-Verify through the use of mandatory refresher tutorials and updates to the E-Verify User Manual. Even without changes to E-Verify, DHS reserves the right to require employers to take mandatory refresher tutorials.
5. DHS agrees to provide to the Employer a notice, which indicates the Employer's participation in E-Verify. DHS also agrees to provide to the Employer anti-discrimination notices issued by the Office of Special Counsel for Immigration-Related Unfair Employment Practices (OSC), Civil Rights Division, U.S. Department of Justice.
6. DHS agrees to issue each of the Employer's E-Verify users a unique user identification number and password that permits them to log in to E-Verify.
7. DHS agrees to safeguard the information the Employer provides, and to limit access to such information to individuals responsible for the verification process, for evaluation of E-Verify, or to such other persons or entities as may be authorized by applicable law. Information will be used only to verify the accuracy of Social Security numbers and employment eligibility, to enforce the INA and Federal criminal laws, and to administer Federal contracting requirements.
8. DHS agrees to provide a means of automated verification that provides (in conjunction with SSA verification procedures) confirmation or tentative nonconfirmation of employees' employment eligibility within three Federal Government work days of the initial inquiry.
9. DHS agrees to provide a means of secondary verification (including updating DHS records) for employees who contest DHS tentative nonconfirmations and photo mismatch tentative nonconfirmations. This provides final confirmation or nonconfirmation of the employees' employment eligibility within 10 Federal Government work days of the date of referral to DHS, unless DHS determines that more than 10 days may be necessary. In such cases, DHS will provide additional verification instructions.

ARTICLE III

REFERRAL OF INDIVIDUALS TO SSA AND DHS

A. REFERRAL TO SSA

1. If the Employer receives a tentative nonconfirmation issued by SSA, the Employer must print the notice as directed by E-Verify. The Employer must promptly notify employees in private of the finding and provide them with the notice and letter containing information specific to the employee's E-Verify

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case. The Employer also agrees to provide both the English and the translated notice and letter for employees with limited English proficiency to employees. The Employer agrees to provide written referral instructions to employees and instruct affected employees to bring the English copy of the letter to the SSA. The Employer must allow employees to contest the finding, and not take adverse action against employees if they choose to contest the finding, while their case is still pending.

2. The Employer agrees to obtain the employee's response about whether he or she will contest the tentative nonconfirmation as soon as possible after the Employer receives the tentative nonconfirmation. Only the employee may determine whether he or she will contest the tentative nonconfirmation.

3. After a tentative nonconfirmation, the Employer will refer employees to SSA field offices only as directed by E-Verify. The Employer must record the case verification number, review the employee information submitted to E-Verify to identify any errors, and find out whether the employee contests the tentative nonconfirmation. The Employer will transmit the Social Security number, or any other corrected employee information that SSA requests, to SSA for verification again if this review indicates a need to do so.

4. The Employer will instruct the employee to visit an SSA office within eight Federal Government work days. SSA will electronically transmit the result of the referral to the Employer within 10 Federal Government work days of the referral unless it determines that more than 10 days is necessary.

5. While waiting for case results, the Employer agrees to check the E-Verify system regularly for case updates.

6. The Employer agrees not to ask the employee to obtain a printout from the Social Security Administration number database (the Numident) or other written verification of the SSN from the SSA.

B. REFERRAL TO DHS

1. If the Employer receives a tentative nonconfirmation issued by DHS, the Employer must promptly notify employees in private of the finding and provide them with the notice and letter containing information specific to the employee's E-Verify case. The Employer also agrees to provide both the English and the translated notice and letter for employees with limited English proficiency to employees. The Employer must allow employees to contest the finding, and not take adverse action against employees if they choose to contest the finding, while their case is still pending.

2. The Employer agrees to obtain the employee's response about whether he or she will contest the tentative nonconfirmation as soon as possible after the Employer receives the tentative nonconfirmation. Only the employee may determine whether he or she will contest the tentative nonconfirmation.

3. The Employer agrees to refer individuals to DHS only when the employee chooses to contest a tentative nonconfirmation.

4. If the employee contests a tentative nonconfirmation issued by DHS, the Employer will instruct the

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employee to contact DHS through its toll-free hotline (as found on the referral letter) within eight Federal Government work days.

5. If the Employer finds a photo mismatch, the Employer must provide the photo mismatch tentative nonconfirmation notice and follow the instructions outlined in paragraph 1 of this section for tentative nonconfirmations, generally.

6. The Employer agrees that if an employee contests a tentative nonconfirmation based upon a photo mismatch, the Employer will send a copy of the employee's Form I-551, Form I-766, U.S. Passport, or passport card to DHS for review by:

- a. Scanning and uploading the document, or
- b. Sending a photocopy of the document by express mail (furnished and paid for by the employer).

7. The Employer understands that if it cannot determine whether there is a photo match/mismatch, the Employer must forward the employee's documentation to DHS as described in the preceding paragraph. The Employer agrees to resolve the case as specified by the DHS representative who will determine the photo match or mismatch.

8. DHS will electronically transmit the result of the referral to the Employer within 10 Federal Government work days of the referral unless it determines that more than 10 days is necessary.

9. While waiting for case results, the Employer agrees to check the E-Verify system regularly for case updates.

ARTICLE IV SERVICE PROVISIONS

A. NO SERVICE FEES

1. SSA and DHS will not charge the Employer for verification services performed under this MOU. The Employer is responsible for providing equipment needed to make inquiries. To access E-Verify, an Employer will need a personal computer with Internet access.

ARTICLE V MODIFICATION AND TERMINATION

A. MODIFICATION

1. This MOU is effective upon the signature of all parties and shall continue in effect for as long as the SSA and DHS operates the E-Verify program unless modified in writing by the mutual consent of all parties.

2. Any and all E-Verify system enhancements by DHS or SSA, including but not limited to E-Verify checking against additional data sources and instituting new verification policies or procedures, will be covered under this MOU and will not cause the need for a supplemental MOU that outlines these changes.

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B. TERMINATION

1. The Employer may terminate this MOU and its participation in E-Verify at any time upon 30 days prior written notice to the other parties.
2. Notwithstanding Article V, part A of this MOU, DHS may terminate this MOU, and thereby the Employer's participation in E-Verify, with or without notice at any time if deemed necessary because of the requirements of law or policy, or upon a determination by SSA or DHS that there has been a breach of system integrity or security by the Employer, or a failure on the part of the Employer to comply with established E-Verify procedures and/or legal requirements. The Employer understands that if it is a Federal contractor, termination of this MOU by any party for any reason may negatively affect the performance of its contractual responsibilities. Similarly, the Employer understands that if it is in a state where E-Verify is mandatory, termination of this by any party MOU may negatively affect the Employer's business.
3. An Employer that is a Federal contractor may terminate this MOU when the Federal contract that requires its participation in E-Verify is terminated or completed. In such cases, the Federal contractor must provide written notice to DHS. If an Employer that is a Federal contractor fails to provide such notice, then that Employer will remain an E-Verify participant, will remain bound by the terms of this MOU that apply to non-Federal contractor participants, and will be required to use the E-Verify procedures to verify the employment eligibility of all newly hired employees.
4. The Employer agrees that E-Verify is not liable for any losses, financial or otherwise, if the Employer is terminated from E-Verify.

ARTICLE VI PARTIES

- A. Some or all SSA and DHS responsibilities under this MOU may be performed by contractor(s), and SSA and DHS may adjust verification responsibilities between each other as necessary. By separate agreement with DHS, SSA has agreed to perform its responsibilities as described in this MOU.
- B. Nothing in this MOU is intended, or should be construed, to create any right or benefit, substantive or procedural, enforceable at law by any third party against the United States, its agencies, officers, or employees, or against the Employer, its agents, officers, or employees.
- C. The Employer may not assign, directly or indirectly, whether by operation of law, change of control or merger, all or any part of its rights or obligations under this MOU without the prior written consent of DHS, which consent shall not be unreasonably withheld or delayed. Any attempt to sublicense, assign, or transfer any of the rights, duties, or obligations herein is void.
- D. Each party shall be solely responsible for defending any claim or action against it arising out of or related to E-Verify or this MOU, whether civil or criminal, and for any liability wherefrom, including (but not limited to) any dispute between the Employer and any other person or entity regarding the applicability of Section 403(d) of IIRIRA to any action taken or allegedly taken by the Employer.
- E. The Employer understands that its participation in E-Verify is not confidential information and may be disclosed as authorized or required by law and DHS or SSA policy, including but not limited to,

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Congressional oversight, E-Verify publicity and media inquiries, determinations of compliance with Federal contractual requirements, and responses to inquiries under the Freedom of Information Act (FOIA).

F. The individuals whose signatures appear below represent that they are authorized to enter into this MOU on behalf of the Employer and DHS respectively. The Employer understands that any inaccurate statement, representation, data or other information provided to DHS may subject the Employer, its subcontractors, its employees, or its representatives to: (1) prosecution for false statements pursuant to 18 U.S.C. 1001 and/or; (2) immediate termination of its MOU and/or; (3) possible debarment or suspension.

G. The foregoing constitutes the full agreement on this subject between DHS and the Employer.

To be accepted as an E-Verify participant, you should only sign the Employer's Section of the signature page. If you have any questions, contact E-Verify at 1-888-464-4218.

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Approved by:

Employer Berry, Dunn, McNeil & Parker	
Name (Please Type or Print) Kasi M Ehlers	Title
Signature Electronically Signed	Date 11/21/2008
Department of Homeland Security – Verification Division	
Name (Please Type or Print) USCIS Verification Division	Title
Signature Electronically Signed	Date 11/21/2008

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Information Required for the E-Verify Program

Information relating to your Company:

Company Name	Berry, Dunn, McNeil & Parker
Company Facility Address	100 Middle Street Suite 5 Portland, ME 04101
Company Alternate Address	PO Box 1100 Portland, ME 04104
County or Parish	CUMBERLAND
Employer Identification Number	10523282
North American Industry Classification Systems Code	541
Parent Company	
Number of Employees	100 to 499
Number of Sites Verified for	3

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Are you verifying for more than 1 site? If yes, please provide the number of sites verified for in each State:

MAINE	1 site(s)
NEW HAMPSHIRE	1 site(s)
WEST VIRGINIA	1 site(s)

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Information relating to the Program Administrator(s) for your Company on policy questions or operational problems:

Name	Debra Genender
Phone Number	(207) 775 - 2387
Fax Number	(207) 774 - 2375
Email Address	dgenender@berrydunn.com

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Appendix A. Resumes



Seth Hedstrom, PMP®, LSSGB

Principal

Seth is a principal and leads BerryDunn's Local Government Practice Group. He has more than 14 years of experience assisting public-sector clients.

His experience includes technology planning, organizational needs assessments, system planning and procurement, and the implementation of enterprise-wide information systems. Seth often serves in a leadership role on strategic planning projects and manages and oversees project progress and issue escalation and resolution with executive project sponsors.

Relevant Experience

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

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

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

Select Clients:

City of Cooper City, FL
City of Ennis, TX
City of Groveland, FL
City of Lauderhill, FL
City of Menifee, CA
City of Milton, GA
City of New Braunfels, TX
City of Redlands, CA
City of Springfield, MO
City of St. Charles, IL
City of Wausau, WI
City of Westminster, CO
DuPage County, IL
Jefferson County, WA
Lancaster County, NE
Lake County, IL
Lane County, OR
Marquette County, MI
Newton County, GA
Orange County, NC

Education:

BS, Business Management,
Babson College

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

Lean Six Sigma Green Belt
Certified

Diversity and Inclusion
Certificate, Cornell University

Membership/

Presentations:

Associate Member,
Government Finance Officers
Association



Michelle Kennedy, Prosci®
CCP, ODCC
Manager

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

Relevant Experience

Strategic Planning: Michelle has developed strategic plans for more than 60 public sector organizations. She actively involves and engages the community, as well as the organization, to gain views for the vision, mission, and goals and helps to prioritize initiatives to yield achievable and measurable outcomes. Most of Michelle's strategic planning clients have retained her to provide updates.

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

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

Select Clients:

City of Beaverton, OR
City of Cooper City, FL
City of Creswell, OR
City of Edgewater, CO
City of Ennis, TX
City of Gresham, OR
City of Groveland, FL
City of Milton, GA
City of Lauderdale, FL
City of New Braunfels, TX
City of Springfield, OR
City of Washougal, WA
City of Wausau, WI
City of Westminster, CO
Jefferson County, WA
Lancaster County, NE
Lane County, OR
Lake County, IL
Marion County, OR
Marquette County, MI
McHenry County, IL
Metro Parks Tacoma
Tompkins County, NY
Weld County, CO

Education:

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

Memberships/Presentations:

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



Karen Whichard, MPA

Senior Consultant

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

Relevant Experience and Qualifications:

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

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

Water Utilities: As a member of the Charlotte Water Leadership Team, Karen managed external communications and performed varying levels of policy analysis and evaluation. She led a project that successfully rebranded the utility from CMUD to Charlotte Water. Karen also assisted the Director and Deputy Director in the implementation of key programs such as biosolids crisis communications, coal ash, changes to rates and fees, and key regulatory requirements for the utility.

Education

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

Master of Public Administration, University of North Carolina Charlotte



Maddison Powers Spencer, MPA

Consultant

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

Relevant Experience

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

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.

Select Clients

Boulder County, CO
City of Ennis, TX
City of Frisco, TC
City of Lauderhill, FL
City of Redding, CA
City of Richland, WA
City of San Leandro, CA
City of St. Charles, IL
City of Tucson, AZ
City of Washougal, WA
City of Wausau, WI
City of Wheat Ridge, CO
Lancaster County, NE
Marquette County, MI
Newton County, GA
Village of Schaumburg, IL
Weld County, CO

Education and Certifications

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

BS, Political Science, Northern
Arizona University

Presentations

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



Groveland

FLORIDA

City with Natural Charm™



Strategic Plan – June 21, 2022

Mission Statement:

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

Vision Statement

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



Core Values

Intentionality



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

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

Connectivity





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

Vitality



Knowledge



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

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

Heart



Informed and Engaged Community

Current State

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

Goal Statement

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

Objectives

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



Performance Metrics

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



Preservation and Conservation

Current State

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

Goal Statement

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

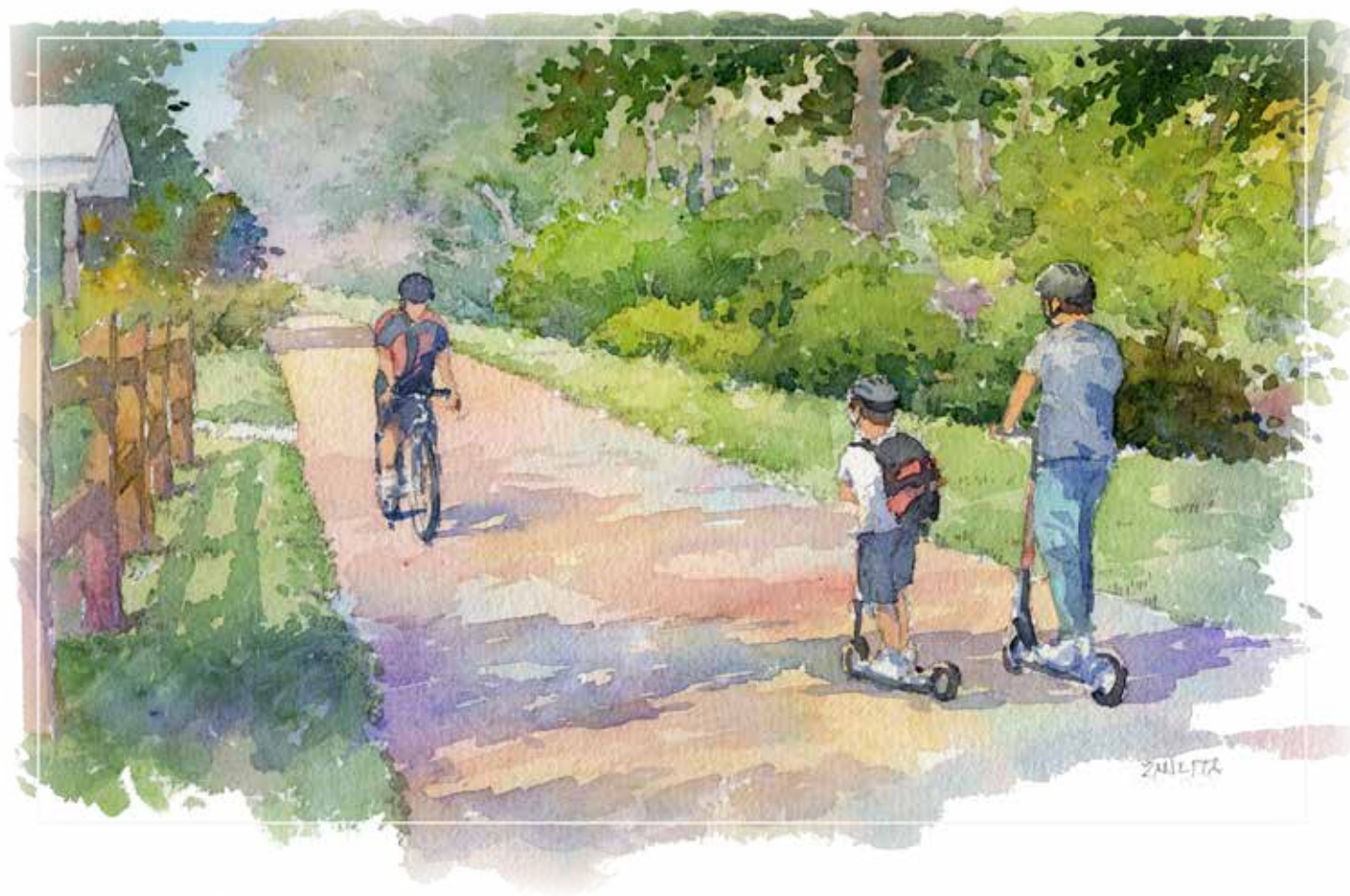
Objectives

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



Performance Metrics

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



Eco-Agrarian Lifestyle

What is Eco-Agrarian?

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

Current State

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

Goal Statement

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

Objectives

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



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

Core Values: Intentionality, Vitality, Connectivity

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

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

Core Values: Intentionality and Vitality

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

Core Values: All

Performance Metrics

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



Community Livability

Current State

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

Goal Statement

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

Objectives

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



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

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

Core Values: Intentionality, Connectivity, Vitality

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

Performance Metrics

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



Financial Health

Current State

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

Goal Statement

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

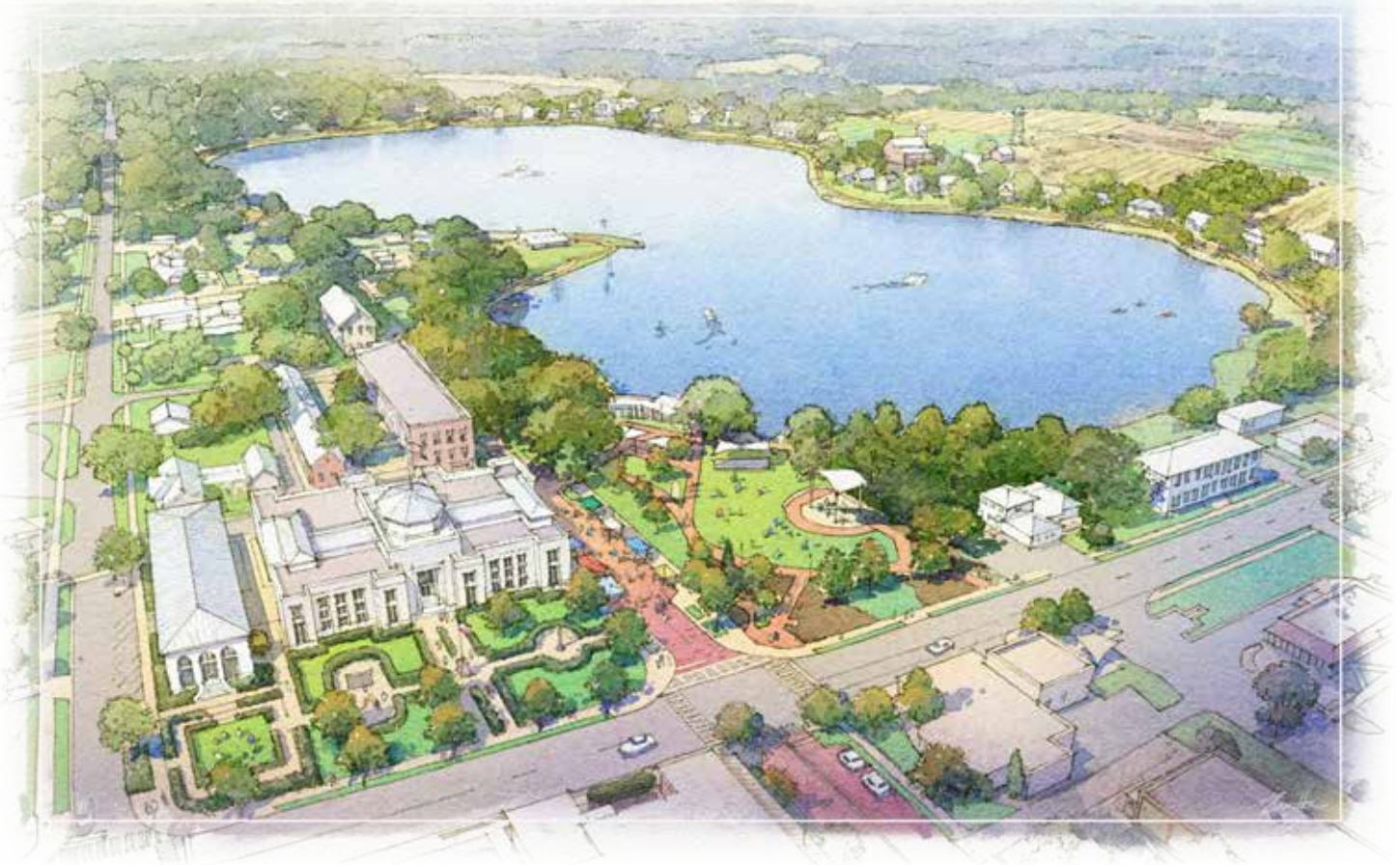
Objectives

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



Performance Metrics

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



Implementation

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



Acknowledgements



City Councilmembers

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

Strategic Plan Committee Members

Chairman Keith Keogh
Vice Chair Jamie Lowe
Chloe Gentry
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Director of Innovation
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Community Services, Mike Walker
Director of Transportation
and Public Works, TJ Fish
HR Director, Deo Persaud
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Public Safety Director/ Police Chief,
Chief Shawn Ramsey
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Khristyna Tremaine
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Human Resources Coordinator



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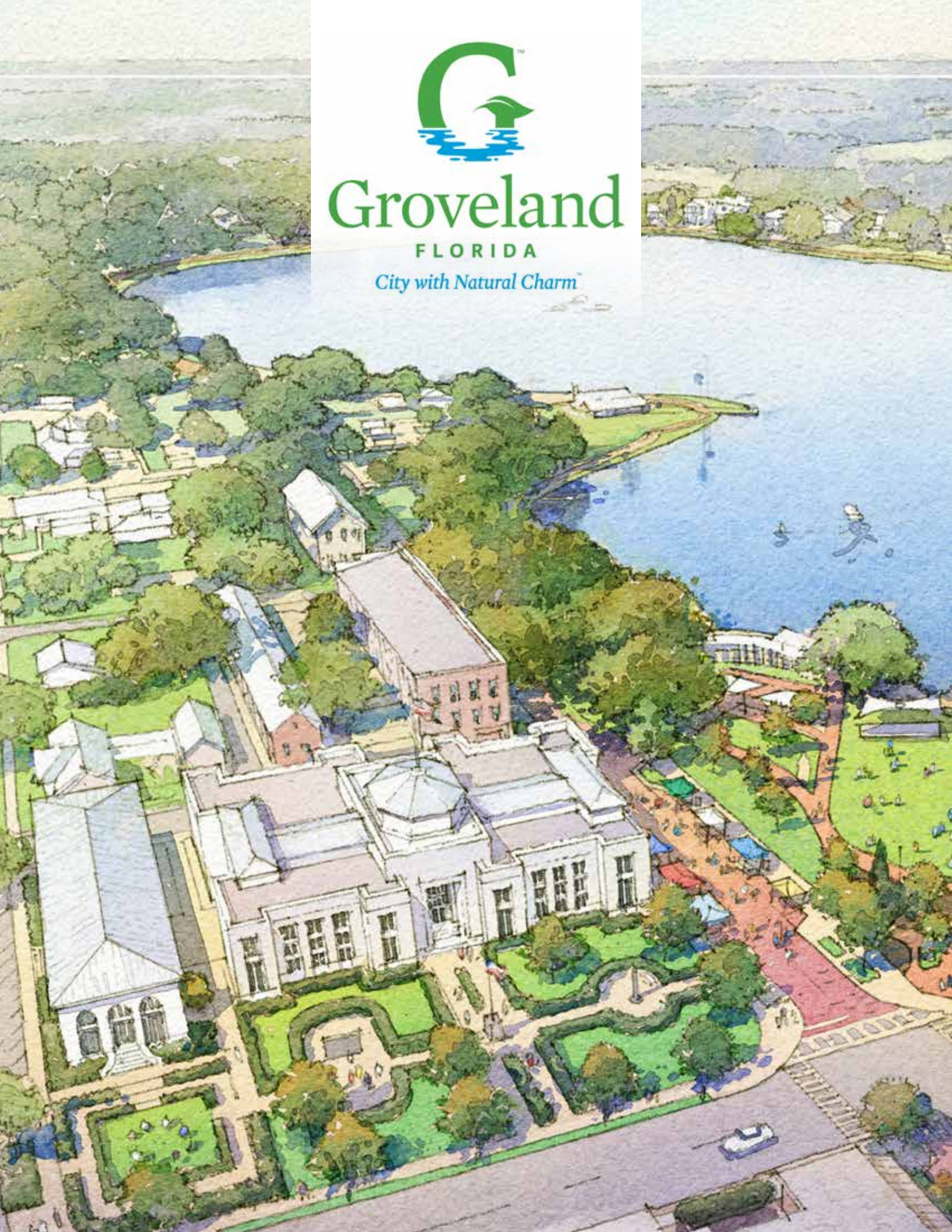
Michelle Kennedy, Project Manager
Charline Kirongozi, Senior Consultant
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Groveland

FLORIDA

City with Natural Charm™





Cooper City

Someplace Special

Strategic Plan 2022-2027

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Mayor's Message

Cooper City Strategic Plan 2022-2027



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

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

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

Sincerely,

Mayor Greg Ross



Mayor
Greg Ross



Commissioner
Jeff Green
District 3



Commissioner
Massimo "Max" Pulcini
District 1



Commissioner
Howard Meltzer
District 2



Commissioner
Ryan C. Shrouder
District 4

Letter from the City Manager

Cooper City Strategic Plan 2022-2027



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

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



City Manager
Joseph Napoli

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

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

With Appreciation,
Joseph Napoli



Mission Statement

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

Core Values

Professionalism

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

Integrity

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

Customer Service

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

Innovation

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

Respect

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

Teamwork

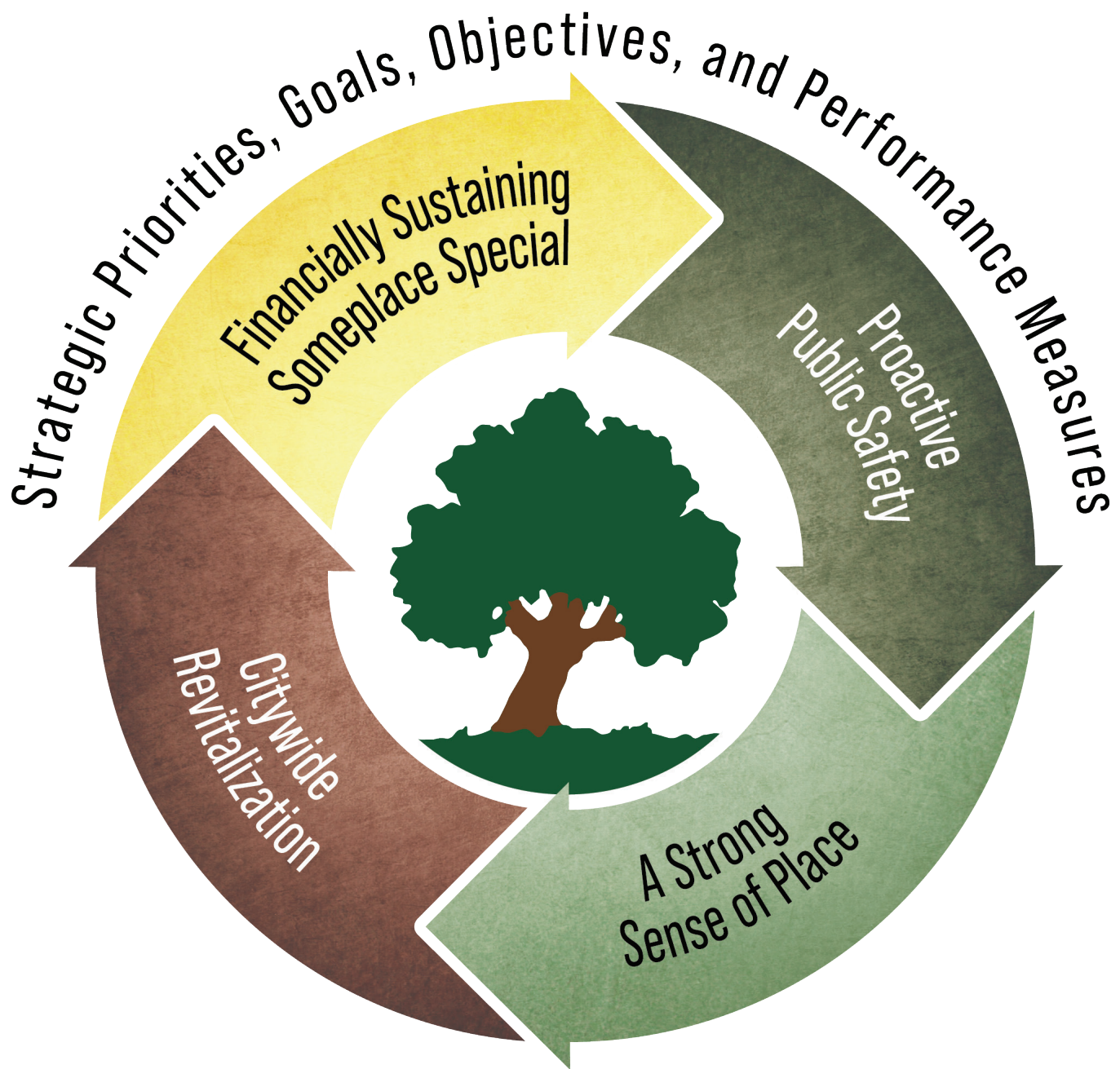
We work together collegially, fully focused on achieving our shared organizational goals and setting aside any personal differences that could hinder progress. We work collaboratively with our residents, businesses, and stakeholders to address their needs.

Transparency

We engage in two-way dialogue with the people of Cooper City, clearly communicate our intentions and decisions and take responsibility for all that we do, thereby earning the trust and confidence of the community.

Vision Statement

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



PRIORITY 1

Financially Sustaining Someplace Special

Cooper City Strategic Plan 2022-2027



Current State

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

Future State

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



PRIORITY 1

Financially Sustaining Someplace Special

Cooper City Strategic Plan 2022-2027



Strategic Goal 1

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

Objectives

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

Performance Measures

Increase revenue stream

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

Expand tax base

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

Increase fiscal transparency

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

Increase fund balance

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

Explore new efficiencies through technological improvements

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

PRIORITY 2

Proactive Public Safety

Cooper City Strategic Plan 2022-2027



Current State

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

Future State

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



PRIORITY 2

Proactive Public Safety

Cooper City Strategic Plan 2022-2027



Strategic Goal 2

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

Objectives

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

Performance Measures

Improved traffic management and safety

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

Improve response times

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

Invest in technological capabilities that enhance public safety

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

Maintain a low-level crime rate

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

Develop an interactive relationship with the community and enhance involvement

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

PRIORITY 3

A Strong Sense of Place

Cooper City Strategic Plan 2022-2027



Current State

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

Future State

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



PRIORITY 3

A Strong Sense of Place

Cooper City Strategic Plan 2022-2027



Strategic Goal 3

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

Objectives

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

Performance Measures

Resident satisfaction with Cooper City as place to live

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

Businesses blending with the charm of Cooper City

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

Connectivity across the city

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

PRIORITY 4

Citywide Revitalization

Cooper City Strategic Plan 2022-2027



Current State

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

Future State

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



PRIORITY 4

Citywide Revitalization

Cooper City Strategic Plan 2022-2027



Strategic Goal 4

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

Objectives

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

Performance Measures

Commercial Centers

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

Residential Areas

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

City-wide Plans and Improvements

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

Thank You

Cooper City Strategic Plan 2022-2027



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

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



CITY OF
Cooper City
Someplace Special

MILTON



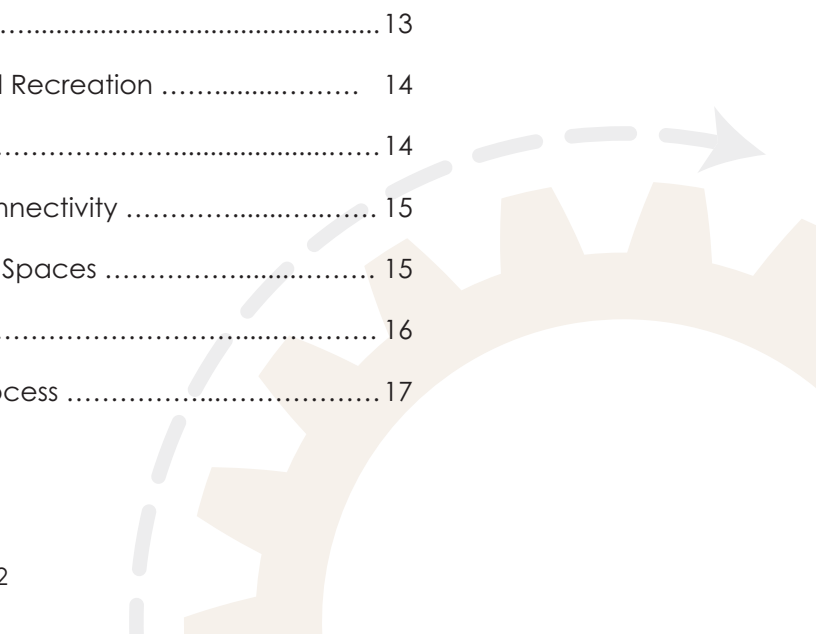
STRATEGIC PLAN 2021-2025





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MAYOR'S MESSAGE



MAYOR
Joe Lockwood

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

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

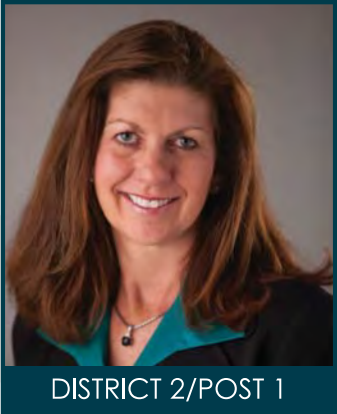
Our citizens deserve a government that constantly looks to improve their lives, reflect their ideals, and plan ahead so Milton's tomorrow is even better than today. That's what this Strategic Plan is all about. Yet it is a starting point, not an endpoint. Our City government will keep listening to our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

Sincerely,
Mayor Joe Lockwood

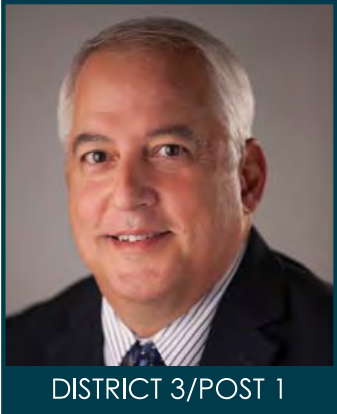
CITY COUNCIL



DISTRICT 1/POST 1
Peyton Jamison



DISTRICT 2/POST 1
Laura Bentley



DISTRICT 3/POST 1
Joe Longoria



DISTRICT 1/POST 2
Carol Cookerly



DISTRICT 2/POST 2
Paul Moore



DISTRICT 3/POST 2
Rick Mohrig

LETTER FROM THE CITY MANAGER AND ORGANIZATIONAL CHART



CITY MANAGER

Steven Krokoff

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

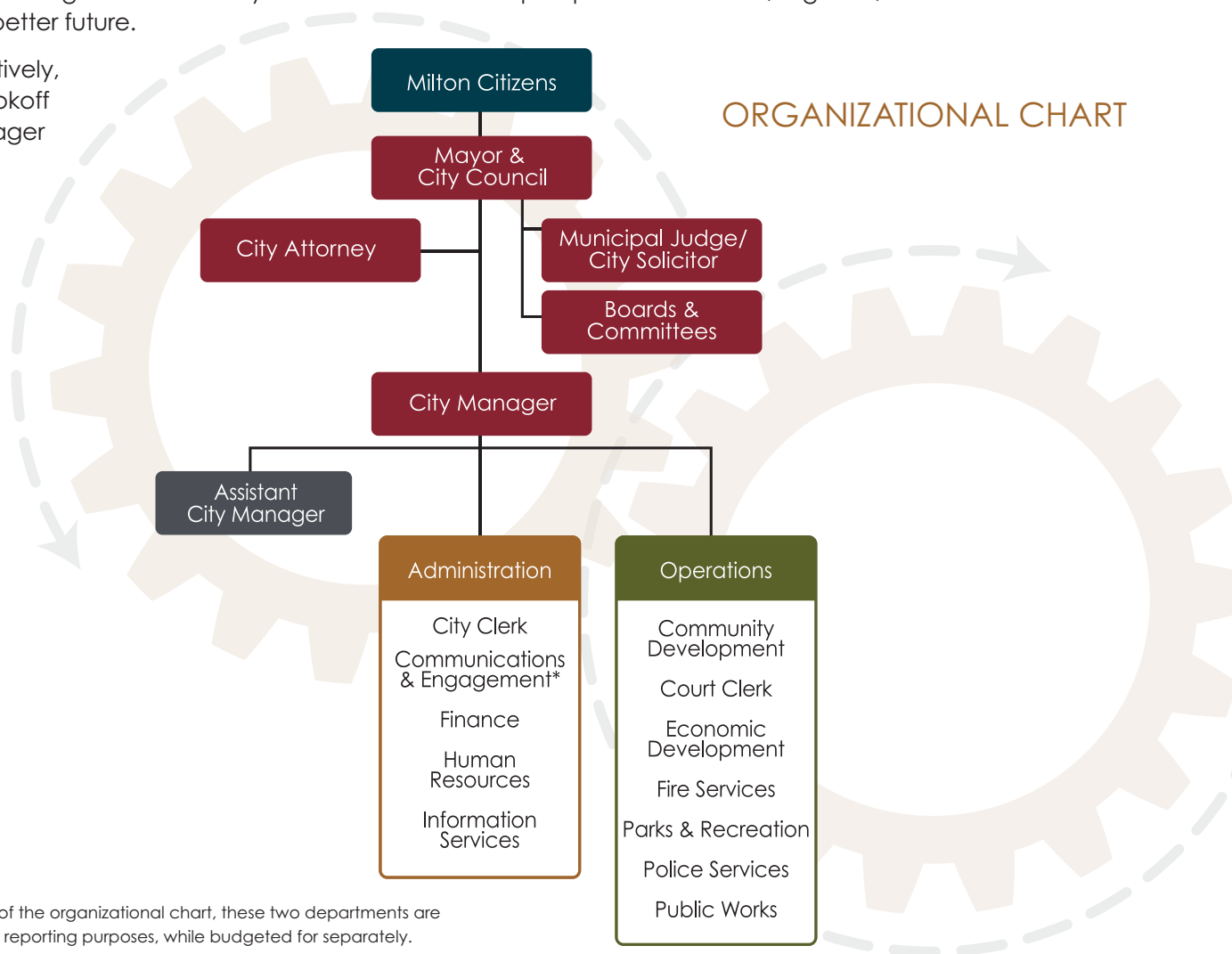
This Strategic Plan resulted from a collaborative, comprehensive process aimed at setting our goals and how we'll know if we've achieved them. After an extensive engagement phase that included feedback from citizens, business owners, committee members, employees, and various stakeholders, our Mayor and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

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

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

Appreciatively,
Steven Krokoff
City Manager

ORGANIZATIONAL CHART



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

PLAN AT A GLANCE

MISSION

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

VISION

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

VALUES

Together We Thrive

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

It's All About Our Rural Heritage

Every step we take protects our rural heritage and culture.

Service Is Our Obsession

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

Own It, Deliver It

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

Lead from the Front

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

STRATEGIC PRIORITY #1

Ensure Milton's Sustainability and Resiliency

Current State

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

Future State

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



Ensure Milton's long-term financial sustainability

OBJECTIVES

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

OUTCOME MEASURES

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



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

OBJECTIVES:

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

OUTCOME MEASURES:

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





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

OBJECTIVES:

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

OUTCOME MEASURES

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



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

OBJECTIVES:

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

OUTCOME MEASURES:

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



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



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

OBJECTIVES:

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

OUTCOME MEASURES

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



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

OBJECTIVES:

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



OUTCOME MEASURES:

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



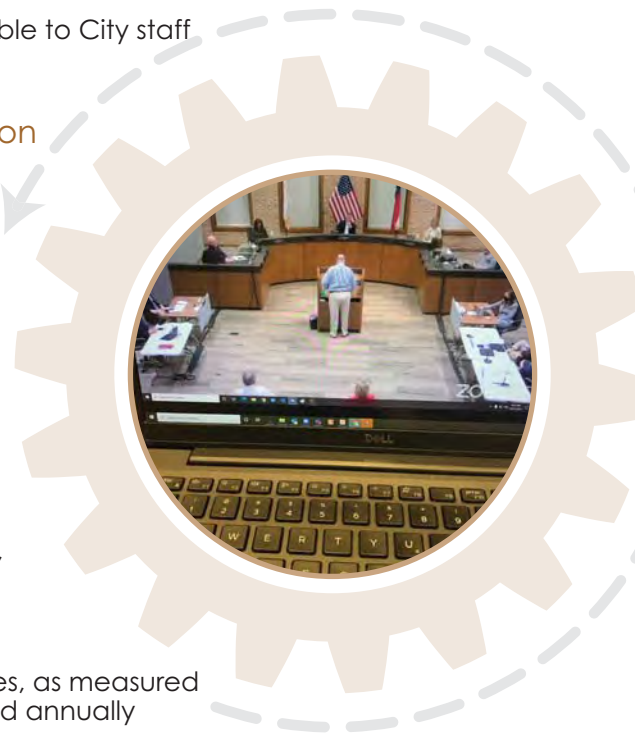
Enhance the effectiveness of the City's information technology to promote efficient operations and customer-oriented service delivery

OBJECTIVES:

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

OUTCOME MEASURES:

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



STRATEGIC PRIORITY #2

Continue Smart Land Planning to Keep Milton Unique

Current State

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

Future State

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





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

OBJECTIVES:

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

OUTCOME MEASURES:

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



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

OBJECTIVES:

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

OUTCOME MEASURES

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



STRATEGIC PRIORITY #3

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

Current State

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

Future State

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

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

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





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

OBJECTIVES

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

OUTCOME MEASURES

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



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

OBJECTIVES:

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

OUTCOME MEASURES:

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





Improve mobility networks to create a more connected Milton

OBJECTIVES:

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

OUTCOME MEASURES

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



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

OBJECTIVES:

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

OUTCOME MEASURES:

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





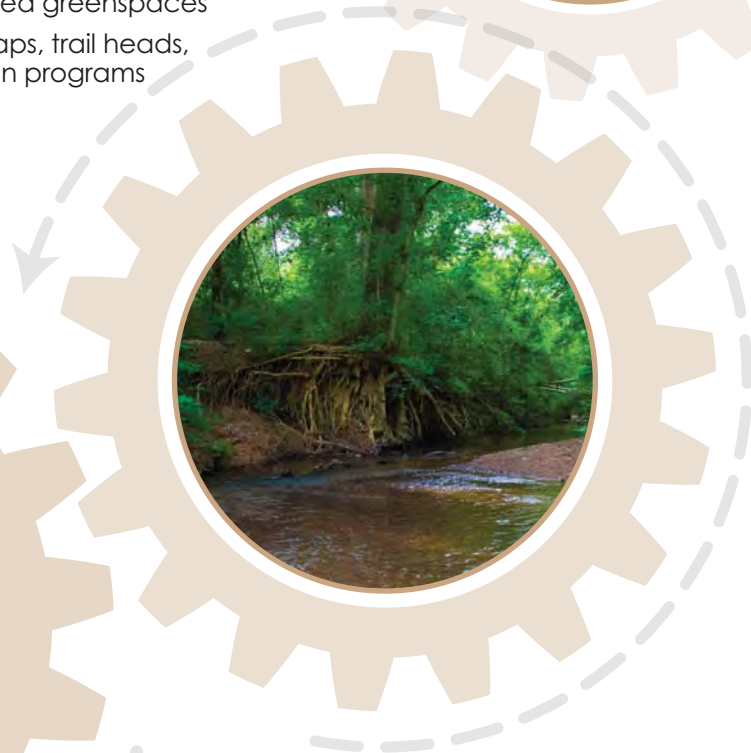
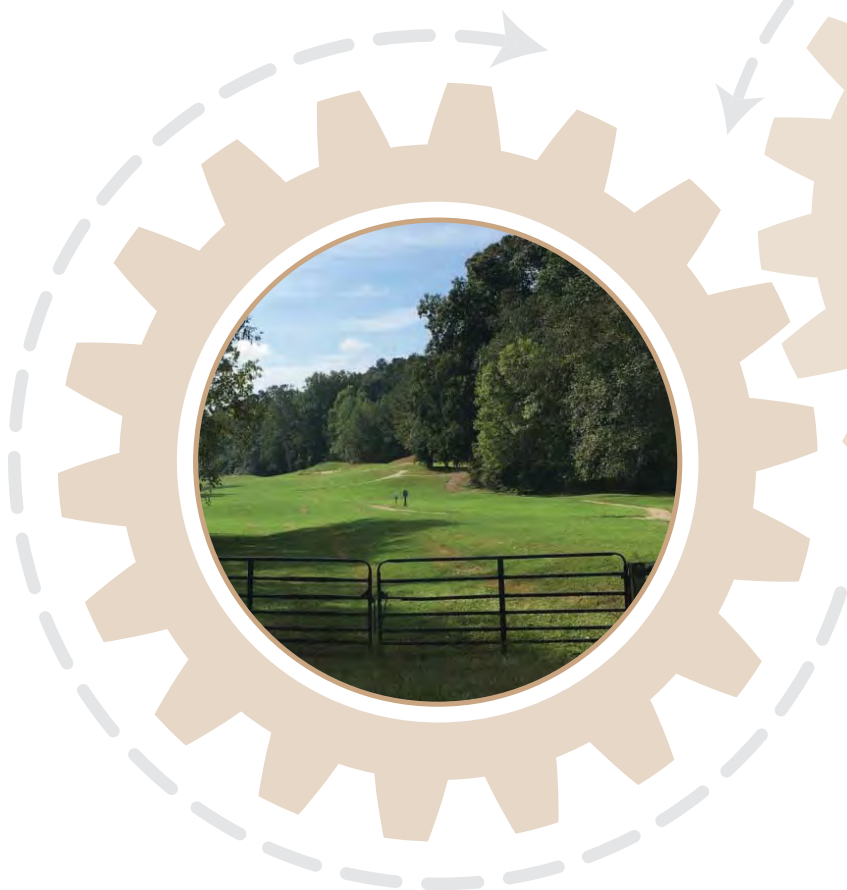
Protect and enhance Milton's greenspaces to maintain the natural beauty of the city for present and future generations

OBJECTIVES:

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

OUTCOME MEASURES

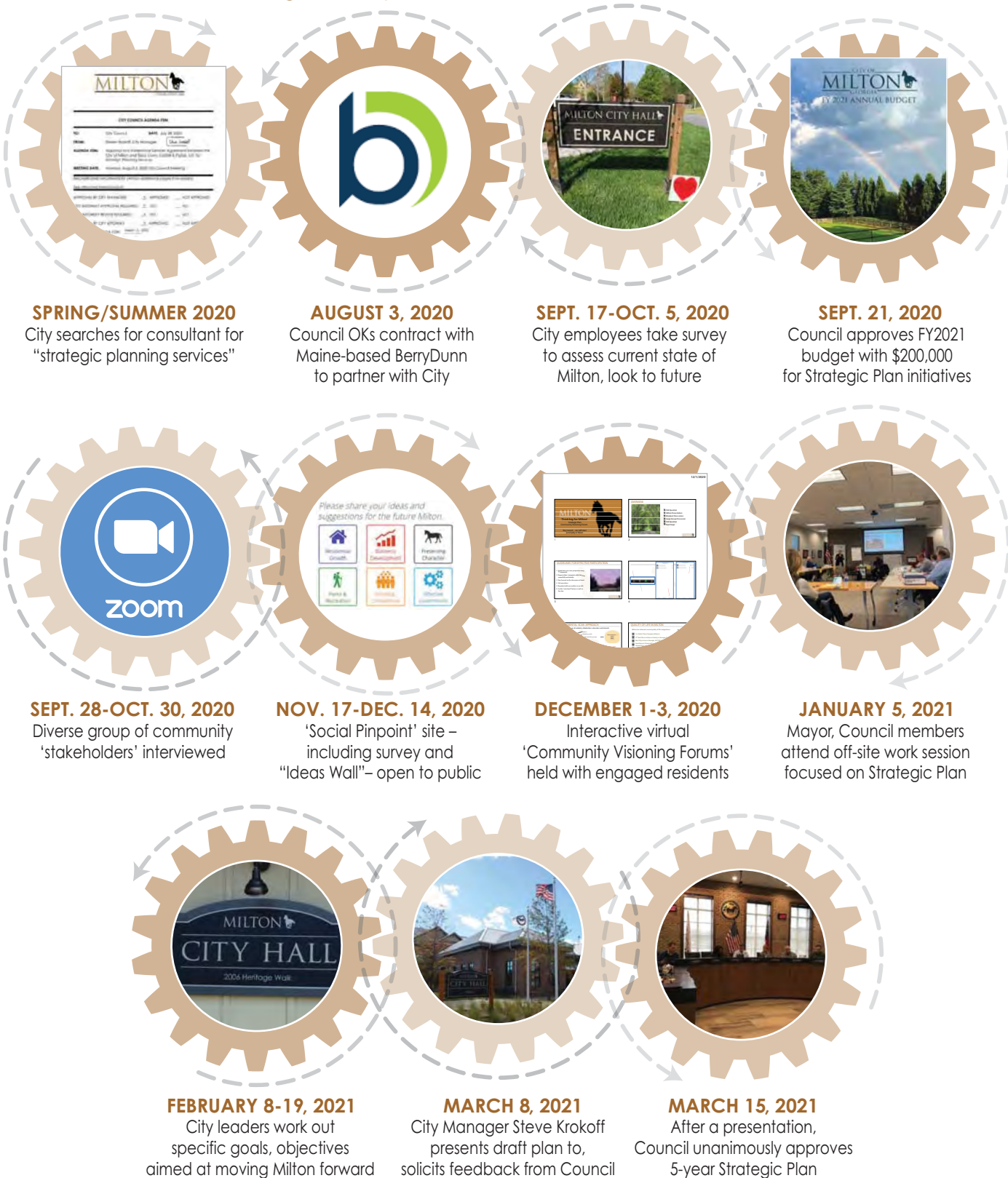
- Complete a greenspace plan/strategy by March 31, 2022
- Year-over-year increases in signage and other educational components at City-owned greenspaces and parks
- Identify opportunities to acquire/add more City-owned greenspaces
- Incorporate greenspaces into Milton's interactive maps, trail heads,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



MILESTONES

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

Here are milestones along the way...





It's where you belong!

Five-Year Strategic Plan | 2022-2027



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MAYOR'S MESSAGE



I am proud to present the City of Wausau Five-Year Strategic Plan for 2022-2027. This plan is an aspirational endeavor for the future of Wausau and an essential look at understanding who we are, who we want to be and how to get there. Its success depends on all of us working together – City Council, City staff, and our residents and businesses – to implement the plan, report and evaluate its progress and make adjustments to continue moving the City of Wausau forward.

This Strategic Plan is the result of a collaborative process that engaged our community. We invited you, our residents and businesses, to let us know how we are doing, to share your ideas and to envision the future of Wausau. We reached out to a wide array of community stakeholders and organizations, as well as our own advisory boards and commissions and city staff. Through our collective efforts we fine-tuned our mission and core values, created a vision and set strategic goals and objectives for the City of Wausau.

I would like to thank the Strategic Planning Steering committee for their support and leadership in this process and members of the City's leadership team for their thoughtful and conscientious contributions to this planning.

Our City Council and staff are determined, dedicated and ready to put in this plan into action while keeping our residents' input and direction at the center of the decision-making process. This is an exciting time for Wausau as we build upon our successes and, together, lead our community to an even better future.

Katie Rosenberg

Mayor

MISSION | VISION | MOTTO

Mission Statement

Enhance our community's quality of life
and foster a sense of belonging
for generations to come.

Vision Statement

Wausau is a fun, vibrant, and highly
connected community providing diverse
and accessible social, arts, cultural and
outdoor recreational experiences and a
thriving economy where everyone has
the opportunity to achieve
success and happiness.

Motto/Tag Line

Welcome Home to Wausau...
It's where you belong

CORE VALUES



Professionalism

We are solution-oriented and work collaboratively to deliver service at the highest standards every time, in every situation.

Accountability

We accept responsibility and take ownership for our actions.

Integrity

We act ethically, honestly, and lead by example by having our actions reflect our word.

Respect

We strive to seek understanding and treat everyone equitably and with compassion.

Innovation

We consciously strive to be thought-leaders and creative in seeking opportunities to improve our service delivery

THRIVING ECONOMY

Strategic Goal

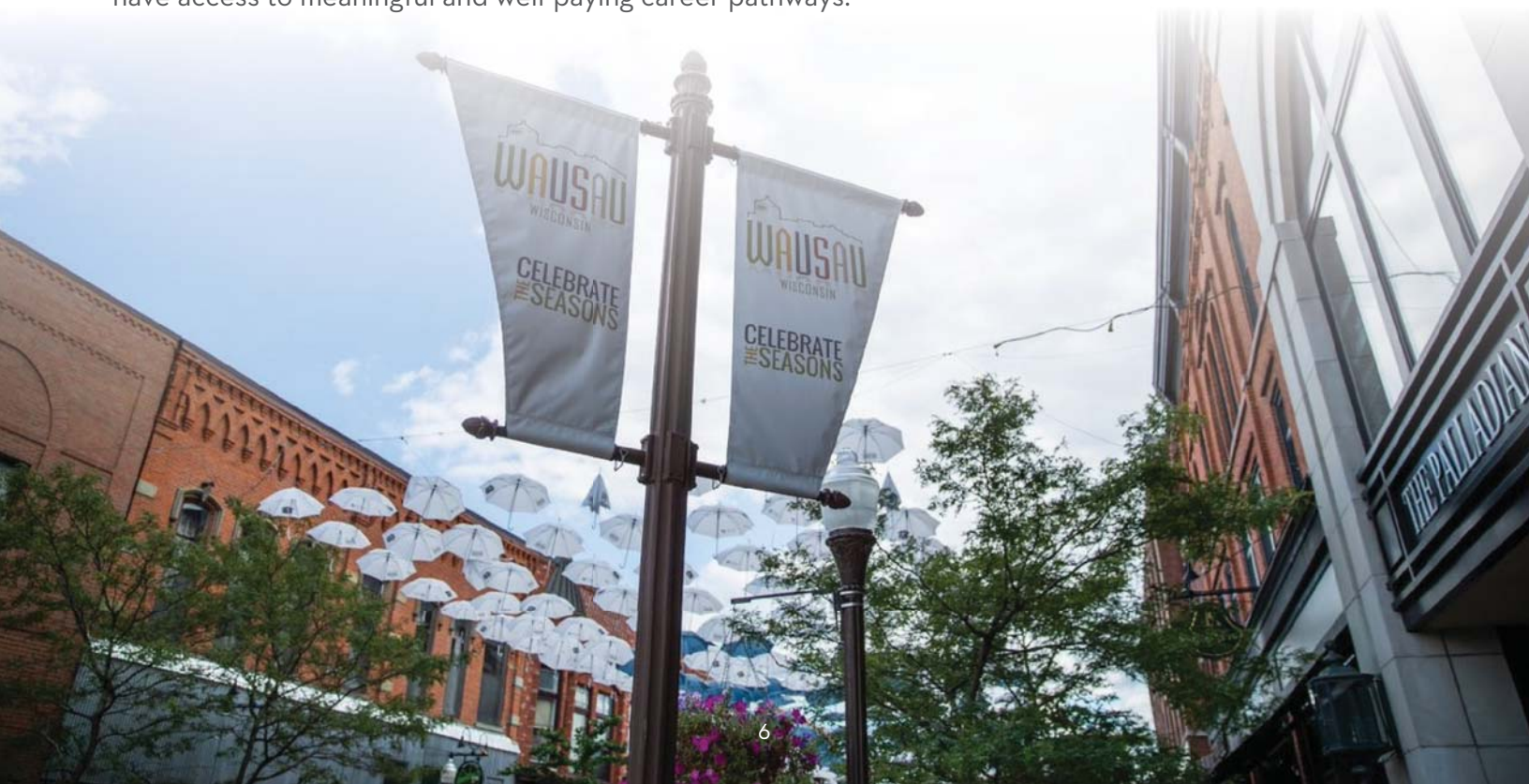
Develop strategies and services to support existing business and workers and attract and retain a skilled workforce and innovative businesses.

Current State

Like many communities across the U.S. businesses are still trying to determine how to fit into the post-COVID economy. Rising inflation and supply chain issues are affecting every aspect of life for residents and businesses. At the same time, Wausau is experiencing record levels of new construction that will have a positive impact on the City's revenue. The City has continued its strategic focus on diversifying the housing options available in the community, expanding manufacturing jobs in the Wausau business campus, and partnering with Marathon County Development Corporation (MCDEVCO) to facilitate gap financing needed by businesses.

Future State

Wausau will work in concert with businesses and other governments in the region to form a cooperative ecosystem in which mutuality reinforcing government and private sector activities contribute to a vibrant community by leveraging the city's strengths in the competitive industry sectors. Wausau will achieve a reputation as an outstanding place to do business, powered by a community-reflecting workforce that is well-supported with diversified housing choices, affordable homeownership opportunities and services that allow workers to fully participate in their career or job of choice and advance their prosperity and standard of living. Wausau's pro-business brand and reputation for entrepreneurship will become a magnet for innovation. Wausau employers will have access to a skilled and developed workforce and workers will have access to meaningful and well-paying career pathways.



Objectives

1. Optimize tax revenue investment to contribute to our thriving economy.
2. Develop human resources to maintain a quality workforce.
3. Highlight our strengths such as health care, agriculture, local businesses, and tourism to build community pride and recognition of community assets.
4. Partner to create wraparound services (childcare, transportation, etc.) for workforce development.
5. Continue to collaborate with businesses to create new and improved existing housing stock.

Performance Measures

- Increase in number and type of workforce supports
- Increase in median household income
- % increase in housing units created
- % increase in housing units improved
- % increase in residents who agree the City is doing a good job in helping to create a thriving business environment and economy (community survey – establish baseline and trend over time)



INNOVATIVE PUBLIC SERVICES

Strategic Goal

Create and implement practices, policies, and procedures to enhance and optimize public services for our community.

Current State

In recent years the City has placed a premium on innovation, with department leadership empowering employees to look for ways to improve and modernize the processes and systems that are used to provide services and programming to the community. Even with this positive thrust the City is still recovering from the Great Recession of 2008 and is now grappling with the impacts of the Great Resignation and the massive re-location that occurred during the pandemic. The City is challenged with finding adequate staffing to fill vacancies and retaining skilled employees in an increasing competitive job market.

Future State

The City delivers exceptional service by working to understand the challenges facing customers, residents and community and incorporating sustainability and resiliency into the core functions of all City departments. City staff are innovative problem-solvers and continuously improve their work processes and practices so City departments can respond rapidly to changing customer needs and demands. The City provides an environment where employees feel engaged and encouraged and have opportunities for growth. Staff and managers have effective tools and templates to work efficiently and operating processes and procedures are designed to focus on what customer's value to the City delivers the right services when and where needed. As part of the City's efforts to maintain its workforce the City has created a focus on professional development that increases the engagement of employees at all levels and results in employees who stay with the City, preserving institutional knowledge.



Objectives

1. Implement creative strategies for service delivery to meet the needs and expectations of our changing community.
2. Attract and retain a City excellent workforce to maintain and increase public service.
3. Maintain and enhance City support at public activities/events so that those events remain safe and efficient.
4. Invest in solutions to ensure environmental sustainability for generations to come.
5. Streamline City processes so new and/or existing businesses operating in Wausau have a set of clear expectations.

Performance Measures

- % increase in business that feel the quality of services provided to businesses by the City meets or exceed their expectations (business survey – establish baseline and trend over time)
- Employee retention rate (tracked annually and trended over time)
- % increase in residents who safe and welcomed at community events (community survey – establish baseline and trend over time)
- % increase in residents who agree that the City is doing a good job of creating a healthy natural environment that sustains the community for current and future generations (establish baseline and trend over time)
- Identify sustainability goals and develop a plan to achieve them (for example: reduction in City facility energy usage, landfill diversion rate, water usage per capita)



COHESIVE AND CONNECTED CULTURE

Strategic Goal

Foster a community culture that embraces diversity and inclusivity so that all who live in and visit Wausau feel welcomed.

Current State

After Wausau and Marathon County made national headlines in May of 2021 when the County Board voted down a resolution embracing diversity, the City has embraced a leadership role in tirelessly promoting Wausau as a “community for all.” The City Council passed the “We Are Wausau” resolution to acknowledge that people’s differences are not consistently respected and to express the determination to move above and beyond all forms of bias and exclusion. With this resolution the City acknowledged there are policies and practices that have created barriers that disproportionately affect refugees and other marginalized segments of the community and that more work is needed to counteract racism and create more opportunity for community members who are under-served or adversely affected by practices that are not equitable.

Future State

Wausau’s communications and community engagement activities and events are welcoming, accessible and culturally responsive. Community members feel welcome and heard and the City uses the input and feedback we receive from the community’s diverse voices in our planning and decision-making. City programs and services protect Wausau’s vulnerable residents, populations and neighborhoods and a mix of amenities are available that are inviting and interesting to all communities that call Wausau home.



Objectives

1. Create a capable, accessible, and reliable communication system in the community to foster transparency and involvement.
2. Market the fun and vibrant social, cultural, and natural recreation opportunities in our community so that people feel a sense of belonging.
3. Create and support innovative programs to better connect newcomers to Wausau to their community.
4. Create innovative shared services with our partner communities resulting in greater regional success and efficiency.

Performance Measures

- Satisfaction of Wausau newcomers with their life in the community (survey on arrival and one year later)
- A multi-channel system for communicating with the community is in place
- A marketing strategy to promote social, cultural and recreational opportunities has been created and implemented
- % increase in resident satisfaction with City communication and engagement (community survey – establish baseline and trend over time)
- % increase in residents overall trust in City government (community survey – establish baseline and trend over time)
- % increase in residents satisfaction with City-sponsored events and activities (community survey – establish baseline and trend over time)



FUN AND VIBRANT COMMUNITY

Strategic Goal

Cultivate and promote the social, cultural, arts, and natural recreation opportunities in our community.

Current State

The City continues to support a rich array of programming and recreational opportunities throughout the community, including over 350 acres of park lands and trails, sponsorship of events in the River District and use of the city's room tax revenue and Community Development Block Grant (CDBG) funds to support events and programming provided by Wausau's community-based organizations. Historic landmarks, the arts and art related events are key cultural resources for Wausau with performing arts, galleries, museums and public art all serving as a hub for people in Central Wisconsin to enjoy. The City and its residents are interested in creating more opportunities to nurture a stronger and more cohesive community, embracing diversity and social interaction and ensuring that a physical and cultural environment with ample gathering places and community-wide events exists to foster these qualities. The City is committed to the goal of continually improving downtown by promoting it as tourist destination, a neighborhood for urban residents and a center of commercial activity. Recent improvements in streetscapes, walkability and parking availability will meet the needs of downtown residents, businesses, and visitors alike.

Future State

Wausau is a cohesive and connected community that considers all cultural, racial and socio-economic factors in order to provide access and opportunities to diverse residents and businesses. The city is a lively, inviting and welcoming designation for residents and visitors alike. Downtown is characterized by attractive buildings and a vibrant street life with interesting places to shop, dine, connect and recreate. These amenities are intentionally inviting to all of Wausau's various communities. Downtown is a place that offers diverse housing options and fosters creative, flexible work environments, business innovation and the arts. Wausau's well-maintained and improved parks and open spaces provide accessible opportunities for everyone in the community to enjoy trails, parks and an active, healthy lifestyle.



Objectives

1. Cultivate continued opportunities for growth in recreation and quality of life offerings from the City to foster economic diversity and community inclusivity.
2. Support diverse community activities that attract participation and understanding of Wausau's history, recreational activities and culture.
3. Deliberately encourage and incentivize the mall redevelopment so that a vibrant downtown is created.
4. Create a destination development plan so that room tax is optimized and the City draws tourists and new residents.
5. Deliberately develop the Riverlife area to better connect the community.

Performance Measures

- % increase in residents who feel welcomed and included in the community (community survey – establish baseline and trend over time)
- Continue to develop the River Edge Trail and complete the West Side Trail in 5 years
- Re-examine the City's special event permits and policies to establish the amount of support and a set of criteria for types of events
- Use the Comprehensive Outdoor Recreation. Plan (CORP) to evaluate the City's 37 parks for its offerings of economic diversity and community inclusivity. (Progress: Evaluate 3-4 parks per year)



STRONG REGIONAL ALLIANCES

Strategic Goal

Organize and lead a regional collaboration with local municipalities to create a common message and destination plan for Wausau and the region.

Current State

While there is renewed interest and effort to collaborate on tourism and mental health services across municipalities in within Marathon County, regional communication and collaboration has been poor historically. Communities within the County have competed against each other for businesses and they market themselves individually rather than as an entire region, and there is no cohesive approach to economic development and marketing. Residents in Wausau are demanding increased transit from MetroRide, and it has been difficult to achieve the level of cooperation that would allow expansion of bus routes and schedules within the city and the towns immediately outside the city's boundaries.

Future State

Wausau will strengthen and expand its cooperative activities with all governments in the region, resulting in an open spirit of cooperation with other cities and the county, increased levels of service to Wausau residents and a cooperative approach to expanding, retaining, and recruiting new businesses and industries to the area. MetroRide services are expanded, serving the needs of Wausau and the surrounding towns and villages. The communities in the region work together to promote sustainable practices that protect our natural environment to ensure a sustainable legacy for future generations and mitigate the impacts of climate change. Residents will regard the natural environment as one of Wausau's most valuable and defining characteristics and visitors will enjoy the ease of access and proximity to natural areas and the community's many recreational opportunities.



Objectives

1. Create and lead a municipal regional coalition so that resources are optimized.
2. Explore the development of regional collaboration so a regional identity is established and a common shared vision and message is established and used.
3. Host waterfront activities such as parties and events to showcase regional unity through a natural resource.
4. Support and lead in green and eco-friendly efforts and initiatives for a cleaner, healthier, and sustainable environment.
5. Develop a plan for economic alignment for the region to build a skilled and available workforce.

Performance Measures

- Number and type of regional initiatives and partnerships with shared resources
- Regional branding and identity plan is completed and implementation progress is measured
- Increase in waterfront activities offered



AGE-FRIENDLY COMMUNITY PLAN

Letter from the Mayor

Wausau has embarked on a community-wide journey to make our city an even better place for residents of all ages and abilities. As the population of 65 years or older continues to increase in our region, we want to ensure that our community's older adults remain in their neighborhoods, living independently and with access to services, amenities and opportunities for community engagement. We are in the process of assessing our community, engaging with residents across the city and in our neighborhoods to learn more about their daily concerns and challenges. As we learn more, we will update our citywide Strategic Plan, as well as this companion Age-Friendly Community Plan to reflect the new information we receive. In the meantime, we intend to pursue age-friendly strategies within the goals and objectives of the Strategic Plan. These age-friendly components are captured here in this companion plan.

Our work going forward includes engaging with our city departments in incorporating an aging lens into all of our daily planning, programming, and services. We will look at our public spaces, buildings and parks to ensure they are meeting the needs of everyone. We will look at our restaurants, shops, museums and other entertainment venues to pave the way for inclusive entertainment. Working with employers, we will empower our older workers, strengthening the entire workforce by creating intentional cross-generational connections and mentorship. I invite you to join us as an advocate, ambassador or volunteer. Together, we will continue working with our community's older adults to honor and respect them and help to ensure for them an active, safe and healthy lifestyle.

Sincerely,

Katie Rosenberg



Introduction to Age-Friendly Communities

As the U.S. population ages and people stay healthy and active longer, communities must adapt. The American Association of Retired Persons (AARP) Network of Age-Friendly Communities helps participating communities become great places for all ages by adopting such features as safe, walkable streets; better housing and transportation options; access to key services; and opportunities for residents to participate in community activities. Well-designed, livable communities promote health and sustain economic growth, and they make for happier, healthier residents – of all ages.

AARP has identified 8 Domains of Livability – features that impact the well-being of older adults – that help make communities more livable for people of all ages. The following are the 8 Domains of Livability and their descriptions:

- 1. Outdoor Spaces and Buildings:** People need public places to gather – indoors and out. Green spaces, seating and accessible buildings (elevators, zero-step entrances, staircases with railings) can be used and enjoyed by people of all ages.
- 2. Transportation:** Driving shouldn't be the only way to get around. Pedestrians need sidewalks and safe, crossable streets. Dedicated bicycle lanes benefit non-drivers and drivers alike. Public transit options can range from the large-scale (trains, buses, light rail) to the small (taxis, shuttles or ride share services).
- 3. Housing:** AARP surveys consistently find that the vast majority of older adults want to reside in their current home or community for as long as possible. Doing so is possible if a home is designed or modified for aging in place, or if a community has housing options that are suitable for differing incomes, ages and life stages.
- 4. Social Participation:** Regardless of a person's age, loneliness is often as debilitating a health condition as having a chronic illness or disease. Sadness and isolation can be combated by having opportunities to socialize and the availability of accessible, affordable and fun social activities.
- 5. Respect and Social Inclusion:** Everyone wants to feel valued. Intergenerational gatherings and activities are a great way for young and older people to learn from one another, honor what each has to offer and, at the same time, feel good about themselves.
- 6. Work and Civic Engagement:** Work does not need to be an all or nothing experience. An age-friendly community encourages older people to be actively engaged in community life and has opportunities for residents to work for pay or volunteer their skills.
- 7. Communication and Information:** We now communicate in ways few could have imagined a decade ago. Age-friendly communities recognize that information needs to be shared through a variety of methods since not everyone is tech-savvy, and not everyone has a smartphone or home-based access to the internet.
- 8. Community and Health Services:** At some point, every person of every age gets hurt, becomes ill or simply needs some help. While it's important that assistance and care be available nearby, it's essential that residents are able to access and afford the services required.

AGE-FRIENDLY COMMUNITY PLAN

Wausau's Age-Friendly Profile

The population over 65 years of age is typically entering retirement and requires services like accessibility to healthcare, senior facilities, universal housing and variety of transportation options to access services and programs. Wausau's population of 65 years or older increased from 15% of the total population in 2010 to 17% in 2020. While that is not significant growth, Marathon County's population of 65 years or older has increased by 30% over the last three decades and the state experienced a similar trend of 25% over 30 years. Although Wausau does not match the county and state trends in growth of this population cohort, the city has a higher percentage of population over 65 years of age than the rest of the region or the state. As members of the baby boomer generation continue to retire at a rapid pace, the need for an age-friendly approach to community living will be more important than ever.

Age-Friendly Community Vision and Values

Vision

In Wausau all residents can remain and thrive as they age and be a powerful resource in making our city a better, stronger, more inclusive community for everyone. Age-friendly means a place that is vibrant and livable for all ages, where daily life is healthy, safe and comfortable, people are well connected via transportation options, communication methods and plentiful social activities, and the community is enriched by the creation of intergenerational relationships.

Values

- Everyone is respected and included, regardless of cultural or religious background, language, sexual orientation, gender identity or gender expression, ability, socioeconomic status or geographic location.
- Age- and ability-friendly business development will have a positive effect on the community's economy.
- Residents of all ages, abilities, races or ethnicities, and socioeconomic statuses are involved in deciding priorities, shaping actions and bringing about change.
- Age-friendly environments and communities benefit all age groups.
- We will utilize, whenever possible, existing services and/or help to expand our capacity and new services will be created only when needed services are not available.

Age-Friendly Action Plan

The City will focus its initial efforts in the following Age-Friendly Domains:

Outdoor Spaces and Buildings

- Complete the expansion of the city's RiverWalk trail along the Wisconsin River in a manner that is totally accessible.

Transportation

- Support and advocate through the City's Bike and Pedestrian Committee alternative transportation with a heavy emphasis on bike paths and lanes and sidewalk improvements.
- Implement the City's Economic Development Committee resolution for more off-road trails and paths by applying for a transportation grant to implement these improvements.

Housing

- Expand living options for seniors by converting Riverside Terrace – an assisted living facility without a waiting list and full occupancy – to elder living where residents can hire their own in-home health providers.

Social Participation

- Continue to support The Landing senior center at the Wausau Woodson YMCA and other senior-focused services and amenities.
- Continue to support and connect the activities of the Aging and Disability Resource Connection, Optimists, Rotary, Elks, Golden Kiwanis and other services clubs that play a central role in connecting and engaging seniors in social activities.
- Increase intergenerational classes and activities, particularly those that connect seniors with youth.



ACKNOWLEDGEMENTS

This strategic plan is the result of the combined efforts of our City's residents, elected officials, employees and stakeholders. The City of Wausau would like to thank all those who participated in the months-long process of providing knowledge and insights. The City also expresses gratitude to the BerryDunn consulting team for providing direction and expertise throughout the various stages of the process and to Faithful Consulting for providing expert engagement of Wausau's Hmong community.

Strategic Planning Steering Committee

Katie Rosenberg, Mayor

Benjamin Bliven, Police Chief

Liz Brodek, Development Director

Ken Day, Community member

Jean Frankel, Executive Assistance to the Mayor

Leah Giordano, Library Director, Marathon County

Mary Anne Groat, Finance Director

Luis Melendez, Business Owner

Tim Van de Yacht, Community Member

Sarah Watson, Alderperson, 8th District

Meilyn Xiong, Business Owner

BerryDunn Consulting Team

Jonathon Grace, Principal

Michelle Kennedy, Project Manager

Charline Kirongozi, Facilitator

Faithful Consulting

Yenyee Lor, President



STRATEGIC ◆ PLAN ◆ --- 2023-2027



CITY OF
ST. CHARLES

ILLINOIS • 1834

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MESSAGE FROM THE MAYOR

St. Charles continues to be a place where people want to be — to live, visit, or operate a business. Being a vibrant, destination city that residents want to call home and where businesses thrive comes from purposeful planning.

I am pleased to present the City of St. Charles Strategic Plan for 2023-2027. It establishes the City's vision and priorities, and outlines the actions that will help us achieve them. We will use this plan to guide our budget and policy decisions for the next five years.



It is our residents and businesses that make St. Charles the great city that it is. We reached out to the community in the strategic planning process so they could share what matters most to them. We encouraged participation by holding both in-person and virtual meetings. We also hosted a dedicated website where members of the community could pin comments, ideas and photos. The site successfully drew more than 10,000 visits.

Along with community feedback, information from established plans and key stakeholders contributed to this plan.

In our last community survey, 99% of residents surveyed said St. Charles is an excellent or good place to live. We look to uphold that level of satisfaction as the Strategic Plan will guide decisions about City services, programs, and initiatives.

I would like to thank St. Charles City Council, City leaders and staff, and all in the community who came together to share their suggestions. I look forward to seeing our plan come to life and to reaching the goals we set for our City as we build on the on continued successes for St. Charles in the future.

Sincerely,

A handwritten signature in black ink that reads "Lora A. Vitek". The signature is fluid and cursive, with the first name "Lora" being the most prominent.

Lora A. Vitek

Mayor

WHO WE ARE

Mission Statement

We provide exceptional Services, honor Tradition,
and foster a thriving Community.



Vision Statement

An engaged community with a sense of place
and belonging where everyone is welcome.



Guiding Principles

EXCELLENCE

We strive to provide high quality services
and an exceptional quality of life.

ENGAGEMENT AND INCLUSION

We encourage all voices be heard and create accessible opportunities
for everyone to participate and contribute to our community.

SUSTAINABILITY AND RESILIENCE

We prepare for the future and cultivate progress
while valuing our natural environment and resources.

RESPECT

We treat our residents, businesses, employees,
and visitors with dignity.

SENSE OF COMMUNITY

We foster a safe and vibrant environment in which new ideas and
perspectives combine with our unique character to create a sense of place.

STEWARDSHIP AND ACCOUNTABILITY

We pledge to be honest, reliable, and open in our decision-making,
communications, and actions to earn and retain the trust of our community
because we take pride in the importance of our service to the public.

PLAN AT A GLANCE

What is a Strategic Plan?

The Strategic Plan is a living document that guides the City of St. Charles in its decision-making. The Strategic Plan defines WHAT the city wants to become and its vision for the future. It also defines what the city will prioritize and focus on to achieve its vision, the specific actions that will be taken, and how progress will be measured.

The City of St. Charles has identified four Strategic Priorities, as shown in the graphic below. Each Strategic Priority has a goal statement, strategic goals, and outcome objectives which are further explained on the subsequent pages.





BALANCED AND THOUGHTFUL DEVELOPMENT



STRATEGIC PRIORITY 1

BALANCED AND THOUGHTFUL DEVELOPMENT

Support economic growth that respects our unique character and contributes to a diverse local economy by facilitating developments that enhance the community's quality of life.

STRATEGIC GOALS

- ♦ Evaluate existing development programs, policies, and codes and ensure all are updated to improve efficiency and impacts on community stakeholders.
- ♦ Ensure zoning, land use, and other policies align with the community's vision and development goals.
- ♦ Partner with regional and local river advocacy organizations to explore strategies to enhance the river's health while providing opportunities to recreate and enjoy.
- ♦ Create a mobility plan that includes streets, sidewalks, bike paths, and traffic-calming to enhance walkability and accessible movement throughout the city.
- ♦ Complete a comprehensive downtown parking plan to enhance the parking experience for visitors and residents.
- ♦ Identify top priority development sites and implement a targeted development attraction plan to increase select business interests.
- ♦ Support the real estate and broker community in the attraction of development and new businesses to help ensure alignment with the community's vision and development goals.
- ♦ Create a business retention/visit program to increase the City's awareness of the local business environment and facilitate the retention of existing businesses.
- ♦ Promote and encourage the development of diverse and quality housing options to help ensure all can live in our community.
- ♦ Streamline development process workflow to improve entitlement process, permitting procedure, and communications with the developer community.



OUTCOME OBJECTIVES

- ♦ Update the City's Comprehensive Plan with community engagement by the end of 2027.
- ♦ Conduct 24 business visits annually, prepare comprehensive findings report, and present to City Council.
- ♦ Create and implement a business/development attraction campaign and disseminate a progress report to City Council quarterly.
- ♦ Determine and publish top priority development sites for the east side, west side, and downtown annually.
- ♦ Create and implement a developer satisfaction survey by the end of 2023.
- ♦ Conduct a Development Review Process study by January 2023.
- ♦ Complete the Downtown Comprehensive Parking study, which includes a signage analysis, by April 2023.
- ♦ Create a developer procedure and process playbook by the end of 2024.
- ♦ Review existing development programs, policies, and codes and update as needed:
 - Economic Development Incentive Policy by the end of 2023.
 - Downtown Overlay District by the end of 2023.
 - Affordable Housing requirements and programs by the end of 2024.



COMMUNITY ENGAGEMENT

STRATEGIC PRIORITY 2

COMMUNITY ENGAGEMENT

Improve the community's experiences with the City through engaging methods of communication to enhance accessibility, increase awareness, and encourage discussion.

STRATEGIC GOALS

- ◆ Modernize the City's digital presence to increase accessibility, information sharing, and services online.
- ◆ Employ digital tools for residents and community partners to increase opportunities for feedback, discussion, and two-way engagement.
- ◆ Strengthen relationships with community partners and neighborhoods to increase the City's visibility and improve its public presence.
- ◆ Enhance communication platforms to increase outreach and awareness of city services, accomplishments, initiatives, procurement listings, and job opportunities.
- ◆ Provide interpersonal training opportunities for city employees to enhance their interactions with the public and each other, particularly in high-stress or volatile situations.
- ◆ Increase transparency of City operations to expand community understanding.
- ◆ Evaluate public meeting structure to foster increased communication between staff, elected officials, and the public.
- ◆ Explore strategies or initiatives that recognize a diverse community that is accessible and welcoming to the public.



OUTCOME OBJECTIVES

- ◆ Launch a new City website by the end of 2023.
- ◆ Complete the implementation of the Public Engagement Platform by the end of 2025.
- ◆ Create a new online portal for residents to view and pay utility bills by the end of 2023.
- ◆ Increase the number of digital forms over current PDFs/paper forms on the City website.
- ◆ Develop an open data portal by the end of 2025.
- ◆ Increase the City's attendance and participation at community partner meetings and events (e.g. taxing jurisdiction, business associations, service groups, or community groups).
- ◆ Increase the number of City residents enrolled to receive monthly newsletter.
- ◆ Increase the number of followers and engagement on social media platforms.
- ◆ Increase the number of non-safety personnel employees with interpersonal, de-escalation techniques, mental health recognition and communication, and customer service training by 2024.
- ◆ Evaluate the procurement process and determine methods to increase participation from vendors.
- ◆ Update the Crisis Communication Plan by the end of 2023.
- ◆ Explore branding and communication standards by the end of 2024.
- ◆ Conduct an updated resident survey by the end of 2027.
- ◆ Establish regular meetings with community partners to coordinate and enhance digital service delivery by the end of 2023.
- ◆ Publish and present to City Council a progress report of the strategic plan outcomes objectives annually.



ORGANIZATIONAL RESILIENCY

STRATEGIC PRIORITY 3

ORGANIZATIONAL RESILIENCY

St. Charles will commit necessary resources to improve its infrastructure and meet public service expectations, so St. Charles continues to be a desirable community for people and businesses.

STRATEGIC GOALS

- ♦ Develop a workforce strategy that focuses on retention, recruitment, and staff development to fulfill the City's mission and achieve its strategic priorities.
- ♦ Evaluate departmental core services to align resources, identify challenges, and ensure service level expectations are maintained.
- ♦ Update facility studies for presentation of capital maintenance and improvement plans to the City Council to ensure alignment with strategic priorities, community needs, and service level expectations.
- ♦ Develop infrastructure maintenance plan (roads, bridges, facilities, and fleet) to ensure service delivery and proper asset maintenance continuity.
- ♦ Evaluate water quality to understand potential needs and costs related to water supply within the city.
- ♦ Ensure that programs, policies, and procedures are accessible, inclusive, and represent and respond to the needs of the community.
- ♦ Implement technology to improve internal and external processes and increase efficiencies.
- ♦ Identify and prepare for high risk, low frequency disaster preparedness events including planning for the immediate aftermath and long-term impacts in order to provide stability in the community.
- ♦ Evaluate risks to the organization to identify and address potential security issues and technology concerns.



OUTCOME OBJECTIVES

- ♦ Conduct water quality study and present to City Council by the end of 2025.
- ♦ Review existing capital plans, programs, and policies and update as needed:
 - Complete a Road Maintenance Plan by end of 2023.
 - Complete Street Rating Evaluation and update the Streets Maintenance Plan by the end of 2023.
 - Complete the Bicycle and Pedestrian Plan and Complete Streets Plan by the end of 2023.
 - Update the Homeowner Sewer Assistance Policy by early 2024.
 - Update the Connection Fee Policy by early 2023.
 - Update the Water Utility Master Plan by the end of 2023.
 - Update the Sewer Utility Master Plan by the end of 2025.
 - Update the Electric Utility Master Plan by early 2024.
- ♦ Complete an Emergency Preparedness and Continuity of Operations Plan and adopted by the end of 2024.
- ♦ Conduct a Technology Risk Assessment and present the assessment to City Council by the end of 2024.
- ♦ Develop a Strategic Technology Plan by the end of 2025.
- ♦ Increase views of job postings and applications for jobs through the City's applicant tracking system.
- ♦ Reduce vacancy time for hard-to-fill positions.



FINANCIAL WELLNESS



STRATEGIC PRIORITY 4

FINANCIAL WELLNESS

Implement policies, practices, and procedures that manage long-term liabilities, increase understanding and awareness of the City's fiscal condition, and continue the efficient use of City resources to ensure ongoing financial strength and sustainability.

STRATEGIC GOALS

- ◆ Ascertain appropriate level of annual revenues needed to fund the City's core capital project programs with ongoing revenue sources.
- ◆ Evaluate and implement utility rates that provide the resources necessary to fund improvements to the City's water, sewer, and electric utility systems.
- ◆ Evaluate the City's charges for services for development-related items to better understand the costs and benefits of doing business in St. Charles.
- ◆ Identify ways to expand fiscal and budget transparency for the community to increase understanding of the City's finances.
- ◆ Maintain an appropriate general fund reserve balance in relation to the City's overall financial position to provide financial stability.
- ◆ Develop a Debt Issuance and Management Policy that will manage current outstanding debt and provide guidance for the evaluation process of issuing of new debt.



OUTCOME OBJECTIVES

- ◆ Complete and update the City's capital planning process and projections and identify level of revenues needed to fund the improvements with ongoing revenues on a long-term basis.
- ◆ Determine and set appropriate utility rates to fund operating, capital and annual debt/loan debt service requirements on an annually basis.
- ◆ Development Services Fee study completed by the end of 2025.
- ◆ Improve the content and presentation of the City's annual budget document to provide clearer and more information to be more in line with GFOA best practices for the FY 2025-26 budget document.
- ◆ Continue to develop and issue for the community an annual Popular Annual Financial Report (PAFR) which summarizes the City's financial condition at the end of the year.
- ◆ Evaluate current fund balance metrics to determine if any changes should be recommended by the end of 2024.
- ◆ Implement and revise, if necessary, the City's Debt Policy by April 2023.
- ◆ Maintain good ongoing relations with bond rating agencies.

PROJECT TIMELINE



ACKNOWLEDGEMENTS

This strategic plan is the result of the combined efforts of our City's residents, elected officials, employees and stakeholders. The City of St. Charles would like to thank all those who participated in the months-long process of providing knowledge and insights while also expressing gratitude to the BerryDunn consulting team for providing direction and expertise throughout the various stages of the process.



Elected Officials

Mayor • Lora Vitek

Ronald Silkaitis • Ward 1

Bill Kalamaris • Ward 1

Rita Payleitner • Ward 2

Ryan Bongard • Ward 2

Todd Bancroft • Ward 3

Paul Lencioni • Ward 3

David Pietryla • Ward 4

Bryan Wirball • Ward 4

Ed Bessner • Ward 5

Steve Weber • Ward 5



City Leadership

Heather McGuire • City Administrator

Derek Conley • Director of Economic Development

Russell Colby • Director of Community Development

Larry Gunderson • Director of Information Services

Bill Hannah • Director of Finance

James Keegan • Police Chief

Jennifer McMahon • Director of Human Resources

Peter Suhr • Director of Public Works

Scott Swanson • Fire Chief



BerryDunn Consulting Team

Seth Hedstrom • Principal

Shannon Flowers • Project Manager and Facilitator

Maddi Powers • Facilitator

STRATEGIC PLAN ♦ 2023-2027



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