



### AGENDA ITEM EXECUTIVE SUMMARY

Agenda Item:	Consider approval of a Resolution authorizing the City Administrator to accept the proposal from Thomas P. Miller & Associates in an amount not to exceed \$22,170.00 for Public Engagement services for the Strategic Plan project.		
Presenter & Title:	Stephanie K. Dawkins, City Administrator		
Date:	April 17, 2017		
<b>Please Check Appropriate Box:</b>			
<input checked="" type="checkbox"/>	Committee of the Whole Meeting	<input type="checkbox"/>	Special Committee of the Whole Meeting
<input checked="" type="checkbox"/>	City Council Meeting	<input type="checkbox"/>	Special City Council Meeting
<input type="checkbox"/>	Public Hearing	<input type="checkbox"/>	Other -
Associated Strategic Plan Goal/Objective: Geneva Strategic Plan Update Project			
Estimated Cost: \$22,170.00	Budgeted?	<u>    X    </u>	<b>YES</b> <b>NO</b>
<i>If NO, please explain how the item will be funded:</i>			
<b>Executive Summary:</b>			
<p>The City Administrator with the assistance of the Strategic Plan Advisory Committee (SPAC) has concluded the request for proposal (RFP) process for the Strategic Plan Public Engagement Facilitator. The project was an approved goal for FY 2017-18.</p> <p>The RFP was distributed to nine (9) strategic planning-related firms on June 29, 2017. The names were obtained from previous RFP submittals and upon recommendation from those familiar with said process. The RFP was also posted on the City's website through July 27, 2017.</p> <p>Responses were received from six (6) consulting firms. SPAC reviewed the proposals with guidance from the City Administrator and compared qualifications, methodology, scope of services, experience, cost, and proposed project schedule of all firms. SPAC then invited two (2) firm in for an interview on August 24, 2017.</p> <p>SPAC recommends that the City accept the proposal from Thomas P. Miller &amp; Associates in an amount not to exceed \$22,170.00 for the Public Engagement services for the strategic plan project.</p> <p>Once the public engagement process is complete, the data will be summarized by the consultant and presented to SPAC. SPAC will then embark upon the process of drafting the City's new Strategic Plan.</p> <p>SPAC Chair Elizabeth Clements will be present Monday night to answer any questions the Council may have.</p>			
<b>Attachments:</b> <i>(please list)</i>			
<ul style="list-style-type: none"> <li>• RFP</li> <li>• Resolution No. 2017-88</li> </ul>			
<b>Recommendation / Suggested Action:</b> <i>(briefly explain)</i>			
Recommend approval of a Resolution authorizing the City Administrator to accept the proposal from Thomas P. Miller & Associates in an amount not to exceed \$22,170 for Public Engagement services for the Strategic Plan project.			



**CITY OF GENEVA, ILLINOIS  
STRATEGIC PLAN PUBLIC ENGAGEMENT FACILITATOR  
REQUEST FOR PROPOSALS**

**GENERAL INFORMATION**

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The City of Geneva, Illinois is located in Kane County with a population of 21,495 (2010 Census). It has a Mayor/Council form of government with ten (10) aldermen; two (2) aldermen elected from each of five (5) wards. The Mayor is elected at large and an appointed City Administrator runs the day to day operations of the City. There are seven (7) departments that provide services to residents including the City Administrator's Office, Administrative Services Department, Community Development Department, Economic Development Department, Fire Department, Police Department, and Public Works Department.

The City of Geneva adopted a community Strategic Plan in 1997. In 2007 and again in 2014, the Strategic Plan was updated through a series of public meetings, Council and staff meetings, and Strategic Plan Advisory Committee (SPAC) meetings.

The City of Geneva is now ready to create its next Strategic Plan. The City seeks assistance gathering community input and information necessary to update the plan, including focus groups and interviews with key stakeholders.

**BACKGROUND**

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In 1996, the City's Mayor and Aldermen initiated a community-based strategic planning process. This was done to engage Geneva's residents and the business community in planning for the City's future. An action plan was developed and the committees prioritized their recommendations for implementation. The Geneva City Council adopted the plan in June 1997.

In 1999, the City created the Strategic Plan Advisory Committee (SPAC). A nine (9) member appointed committee, SPAC oversees the maintenance of the Strategic Plan and serves as a conduit between the City and its citizens for suggestions and concerns. Its members serve three (3) year terms and elect their own Chair, Vice-Chair, Secretary, and Treasurer. The Committee currently meets monthly, sets annual goals, holds an annual "town meeting," and presents an annual report to the City Council. SPAC has three (3) subcommittees including, International Cultural Exchange Committee, Student Government Program and the Natural Resources Committee. They have also overseen ad hoc committees to investigate issues at the request of the City Council. These ad hoc committees have included Teardown Infill, Tree Preservation and Cultural Arts.

In 2006, the City determined that an update of the Strategic Plan was necessary and conducted a process whereby public meetings were held, key person interviews were held, a random sample community survey was conducted, and a consulting firm worked closely with the City Council and

staff to produce and adopt the City's Strategic Plan for 2017. The plan was again updated through a public process in 2014.

Each year, the City Council and management staff use the Strategic Plan in a workshop setting to prioritize identified goals and objectives which are then used in the commencement and development of the City's annual budget. City departments incorporate the Council's annual prioritized goals into department goals and budget requests. The City Administrator then reports the progress of goal completion to the City Council on a quarterly basis.

In 2015 and 2016, SPAC met to rewrite and consolidate the goals before the Chairman presented the updated Strategic Plan to the City Council. At the Strategic Planning Workshop in November, 2016, the City Council determined it was once again time to update the Strategic Plan.

### **SCOPE OF REQUIRED SERVICES**

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Respondents will directly assist SPAC and City staff with obtaining the data and information necessary to update the current Strategic Plan document. At a minimum the consultant will provide, but is not limited to the following services:

1. ***Community Outreach:*** Citizen participation is essential to the strategic planning process. The process should incorporate, but is not limited to, the following activities:
  - a. Community Meetings and Focus Groups – Public meetings should include a review with citizens regarding the purpose of the Strategic Plan; explain the process of updating the plan and gather citizen input.
  - b. Media – Consultant will work with staff to prepare articles for the City newsletter, City website and other appropriate public relations releases at key points in the process.
  - c. Key Person Interviews – Interviews will be conducted with key stakeholders to obtain information about the current Strategic Plan and updates that should be made to the plan. The consultant will work with SPAC to identify who those interviewees will be. Examples include, but are not limited to, City elected and appointed officials, contacts from other Geneva governmental entities, contacts from the business community, residents and local organizations.
  - d. Workshop with City Council – The City Council meets annually for a strategic planning workshop in November. It is anticipated that this year the workshop will be used to solicit input and feedback relating to the information gathered from the community meetings and focus groups. The workshop is scheduled for Friday, November 3, 2017.
2. ***Data Collection and Analysis:*** Information from the various avenues of citizen input will be compiled and analyzed for redundancies or common themes.

## **GENERAL TERMS AND CONDITIONS**

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Indemnification: The consultant shall indemnify, defend and hold harmless the City of Geneva, its officers, agents, employees, representatives and assigns, from lawsuits, actions, costs (including attorneys' fees), claims or liabilities of any character brought because of any injuries or damages received or sustained by any person, persons, or property on account of any act or omission, neglect or misconduct of said contractor, its officers, agents and/or employees arising out of, or in the performance of any of the provisions of the contract, including any claims or amounts recovered for any infringements of patent, trademark or copyright; or from any claims or amounts arising or recovered under the "Worker's Compensation Act" or any other law, ordinance, order or decree. In connection with any such claims, lawsuits, actions or liabilities, the City of Geneva, its officers, agents, employees, representatives and their assigns shall have the right to defense counsel of their choice. The consultant shall be solely liable for all costs of such defense and for all expenses, fees, judgments, settlements and all other costs arising out of such claims, lawsuits, actions or liabilities. Consultant agrees to comply with all laws, ordinances, and rules of the City of Geneva and the State of Illinois.

The City reserves the right to reject any or all proposals, waive formalities, and select the consultant that best meets the needs of the City and its employees. The City reserves the right to select and terminate any consultant as deemed necessary based on the needs of the City and its employees. The City reserves the right to request additional information during the evaluation period.

## **PROFESSIONAL LIABILITY (ERRORS AND OMISSIONS) INSURANCE**

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The selected consultant shall procure and maintain for the duration of the contract, Professional Liability Insurance for bodily injury and property damage arising out of the rendering or failure to render proper professional service. The selected consultant shall maintain limits no less than \$1,000,000.

## **RFP AMENDMENTS**

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The City of Geneva reserves the right to amend this RFP any time prior to the closing date.

## **EVALUATION OF PROPOSALS AND AWARD OF CONTRACT**

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A proposal recommendation from City Staff is anticipated to be made to the City Council in August 2017.

## **AWARD OF CONTRACT**

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The City of Geneva will award the services in the manner that will obtain the highest quality of services at the most competitive price. Proposals will be accepted only from firms with demonstrated experience and competency in community engagement, with preference given to those firms with municipal experience. The City reserves the right to negotiate or reject any and all proposals. Proposals will be evaluated by using the following criteria:

- 1.) Proposed cost of service.
- 2.) Experience in providing the requested services, with preference given to those who have completed municipal projects.
- 3.) Compliance with specifications as outlined in the “Scope of Required Services”, section of this Request for Proposal.

Please note that no formal opening of the proposals will take place. Proposals will be evaluated and the successful firm will be contacted subsequent to City Council approval. Consultant interviews may be conducted as deemed necessary by the City Administrator.

#### **TERMINATION OF CONTRACT**

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Either party may terminate this agreement by giving the other party no less than two (2) months written notice. If the consultant terminates the contract prior to completion of the project, all work completed to date shall be given to the City of Geneva. Additionally, the consultant shall reimburse the City for any out of pocket costs incurred in acquiring and retaining a new consultant.

#### **SCHEDULE OF EVENTS**

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<b>Activity</b>	<b>Date</b>
RFP Re-Released	June 27, 2017
Proposals Due	July 27, 2017
Recommend Award	August 2017
Official Approval of Award by City Council	August 2017

#### **TERMS AND CONDITIONS FOR MAKING PROPOSALS**

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- A. **Inquiries from Respondents**  
Please use the contact information below for questions concerning this RFP. All questions must be submitted in writing by email. Questions submitted, and answers to each question, will be posted on the City’s website.

Questions should be directed to:

Stephanie K. Dawkins  
City Administrator  
sdawkins@geneva.il.us

- B. **Costs Incurred in Responding**  
All costs, directly or indirectly related to the preparation of a proposal, including any oral presentations required to supplement and/or clarify a proposal, shall be the sole responsibility of the consultant.
- C. **Response Instructions**

One (1) electronic copy, in PDF, and one (1) hard copy of the proposal should be submitted with the name and address of the respondent and labeled “Proposal for Strategic Plan Update” (PDF via email and one (1) hard copy delivered to City Hall).

Proposals should be directed to:

Proposal for Strategic Plan Public Engagement  
Stephanie K. Dawkins  
City Administrator  
22 South First Street  
Geneva, IL 60134  
[sdawkins@geneva.il.us](mailto:sdawkins@geneva.il.us)

- D. Proposal Acceptance Period  
It is understood that, upon submission of the proposal, the fees proposed will be valid for a period of six (6) months after City Council approval.
- E. Term of Project Contract  
The project is proposed to be substantially complete by November 2017. Ideally the selected consultant will be prepared to present preliminary findings to the City Council and receive feedback at the City Council’s strategic planning workshop on Friday, November 3, 2017.

#### **OWNERSHIP OF MATERIALS**

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All information from consultant reports becomes the property of the City of Geneva.

#### **PROPOSAL FORMAT**

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- A. Overview of Required Sections:
1. Cover Letter
  2. Table of Contents
  3. Consulting Firm Background and Statement of Staff Experience
  4. Statement of Equal Employment Opportunity Practices
  5. Scope of Required Services
  6. Proposed Schedule of Implementation
  7. References
  8. Concluding Remarks
  9. Cost Proposal for Services
  10. Attachments (If applicable)
- B. Cover Letter:  
The cover letter should contain the name of the proposing consultant, the address of the respondents, and the contact individual(s) authorized to answer technical, price, and contract questions. Include contact individuals’ telephone numbers, email addresses, and mailing addresses. Identify the key personnel of the firm who will be assigned to this project. The cover letter must be signed by a person or persons authorized to bind the respondents(s).

- C. **Table of Contents:**  
The contents of the proposal shall be included in an index at the beginning of the proposal and should include all contents and attachments.
- D. **Consulting Firm Background and Statement of Staff Experience:**  
Describe the organization of the staff team that would service the contract. Provide a listing of the management level members of the staff team. Include name, title, length of service with the consultant, resume, education level, and professional achievement/certification of any staff that will assist with the project.
- This section should include the range of services previously performed by the consultant and the consultant's background in providing these services to public entities. Preference will be given to those firms having performed satisfactory services for municipal governments (first within the State of Illinois and second, outside of Illinois).
- E. **Statement of Equal Employment Opportunity Practices.**
- F. **Scope of Required Services:**  
Explain the firm's approach to accomplishing the services described in the Scope of Services section of this RFP. Include a description of the proposed methodology for each service.
- G. **Proposed Schedule of Consulting Services:**  
Please provide an estimated time-line for the project based on the services listed. Include a detailed discussion of the approach, methodology, project management, and how the consultant will interact with the City, broken down into phases.
- H. **References:**  
List a minimum of three (3) references with examples of work provided for review. Provide a contact person and telephone number for each reference. Consultants with like municipal project experience will be given preference (see D, above). Include a Statement of Experience servicing municipal or governmental clients.
- I. **Concluding Remarks:**  
This section may contain any final comments or an elaboration that the respondent believes is important to gain a better understanding of the proposed services and/or respondent's capabilities.
- J. **Cost Proposal:**  
Cost of service quotes should be included for all required components referenced above, detailing personnel and all other costs associated with the project. Please note that each individual component in the Scope of Required Services must be broken out separately. Respondents should include payment terms as part of the cost proposal, including the timing of any progress payments.
- K. **Attachments (if applicable)**

**RESOLUTION NO. 2017-88**

**RESOLUTION ACCEPTING THE PROPOSAL FROM THOMAS P. MILLER & ASSOCIATES FOR PUBLIC ENGAGEMENT SERVICES FOR THE STRATEGIC PLAN PROJECT.**

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**BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF GENEVA, KANE COUNTY, ILLINOIS**, as follows:

**SECTION 1:** That the City Administrator is hereby authorized to accept the proposal from Thomas P. Miller & Associates for public engagement services attached as Exhibit “A.”

**SECTION 2:** This Resolution shall become effective from and after its passage as in accordance with law.

**PASSED** by the City Council of the City of Geneva, Kane County, Illinois, this 5 day of September, 2017.

**AYES: \_\_ NAYS: \_\_ ABSENT: \_\_ ABSTAINING: \_\_ HOLDING OFFICE: \_\_**

Approved by me this 5<sup>th</sup> day of September, 2017.

\_\_\_\_\_  
Mayor

ATTEST:

\_\_\_\_\_  
City Clerk

Proposal for:  
Strategic Plan Public Engagement  
Facilitator

Submitted to:  
City of Geneva, IL

July 27, 2017

Submitted by:



THOMAS P. MILLER & ASSOCIATES

## 1. Cover Letter

July 27, 2017

Stephanie K. Dawkins  
City Administrator  
City of Geneva, Illinois  
22 South First Street  
Geneva, IL 60134

Re: Proposal for Strategic Plan Public Engagement

Dear Ms. Dawkins,

Thomas P. Miller & Associates, LLC (TPMA) is pleased to submit the following proposal to the City of Geneva in response to the Request for Proposals for a Strategic Plan Public Engagement Facilitator.

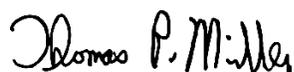
We understand that the City of Geneva is ready to create its next Strategic Plan and is requesting assistance to gather stakeholder feedback for the update. The City of Geneva's approach for creating the Strategic Plan will continue the community-based strategic planning process first initiated in 1996 and also used to gain community input for updating the strategic plan in 2007 and 2014. The goal for the Strategic Plan is to prioritize community goals and visions, and help the Strategic Plan Advisory Committee (SPAC) convey the goals and implementation requirements to City staff and elected officials.

Our firm is based in Indianapolis, Indiana, with additional offices in Lexington, Kentucky and Youngstown, Ohio. Celebrating over 28 years in business, TPMA has a rich history of partnering with public, private, and nonprofit organizations to develop workforce and education solutions and implement strategies for sustainable economic growth. Throughout our history in Economic Development, TPMA has also developed strategies for robust stakeholder engagement and the inclusion of residents' voices to inform plans and to build buy-in from communities at large. We pride ourselves on translating completed research into implementation activities tailored to the assets and opportunities of each client.

As professionals, we strive for excellence with all clients, but our Project Team would particularly value the opportunity to put our expertise to work in Geneva. We look forward to working together and providing your city with a thorough, community-based engagement process.

The principal contact for the TPMA Project Team is Mr. Andrew Carty, Assistant Director of Economic Development. He may be reached at (501) 944-4001, by email at [acarty@tpma-inc.com](mailto:acarty@tpma-inc.com), or by mail at Thomas P. Miller and Associates 1630 North Meridian Street #430, Indianapolis, IN 46202. Other key personnel assigned to this project include Spenser Rohler (Project Manager) and Jack Woods, support staff from TPMA's Economic Development team.

Sincerely,



Thomas P. Miller  
President and CEO  
Thomas P. Miller & Associates, LLC



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## Firm Background and Staff Expertise

### Our Background

TPMA envisions a world that thinks strategically, works collaboratively, and acts sustainably. In keeping with that vision, we empower organizations and communities through strategic partnerships and informed solutions that create positive, sustainable change.

Founded in 1989, we have a long and rich history of projects with public, private, and nonprofit organizations to inform decisions with data, research, and evaluation; secure funding for initiatives; and implement strategies for organizational growth. We have worked with numerous nonprofit, workforce development, economic development, chambers of commerce, education organizations, and private businesses in more than 40 states across the United States.

TPMA has a wealth of experience and knowledge in the economic and workforce development sector, and our approach always tailors to our client's individual needs. We work as partners with our clients to provide comprehensive analysis and reporting. Other services we provide include:

- Stakeholder Engagement
- Sector and Cluster-based Strategy Development
- Labor Market and Industry Analysis
- Professional Development and Training Services
- Strategic and Operational Planning
- Grant Writing and Funding Research
- Program Design and Evaluation
- Business Services Capacity Building
- Asset Mapping

TPMA has facilitated planning and implementation processes for numerous state, regional, and local economic development organizations, workforce boards, chambers of commerce, community colleges, four-year colleges and universities, private businesses, and non-profit organizations. From this extensive experience, we know that to succeed, a plan must be the result of buy-in and ownership by those charged with implementation. To this end, our process includes numerous methodologies, such as focus groups, interviews, and working sessions, to ensure that key stakeholders are fully engaged in the planning process.

Our emphasis is not just on strategic ideas, but strategic leadership and action-oriented goals – helping leaders to identify data-driven opportunities and mobilize resources for implementation. We take a collaborative approach to planning, recognizing that the greatest impact is through the aligned goals of multiple partners.

TPMA has a staff of over 60 people and is headquartered in Indianapolis, Indiana, with branch offices in Lexington, Kentucky and Youngstown, Ohio.



## Our Expertise

TPMA excels at translating completed research, analysis, and planning efforts into recommendations tailored to the assets and opportunities of each client, and we will utilize this strength to maximize this project's value for the City of Geneva.

We pride ourselves in the following strengths:

- Being Data Driven** – By drawing on our proven research methodologies, we can ensure that your final report will be built on a foundation of quantifiable information, not anecdotes and conjecture. This invaluable information will inform our community interactions and lead the Project Team toward final recommendations that are custom-made for your community. By producing a baseline of hard data during this analysis, Geneva will have the correct tools to set goals and measure success.
- Consensus Building** – TPMA prides itself on ensuring our reports come from our partner communities, not our preconceived notions. Throughout our history in Economic Development, TPMA has developed strategies for robust stakeholder engagement and the inclusion of residents' voices to inform plans and to build buy-in from communities at large.
- Strategic Planning Expertise** – Our emphasis is not just on strategic ideas, but strategic leadership and action-oriented goals – helping leaders identify data-driven opportunities and resources for implementation. We take a collaborative approach to planning, recognizing that the greatest impact is through the aligned goals of multiple partners.
- Media and Public Relations Support** – TPMA helps clients expand online and social media presence all while ensuring that messaging and content is approved of and aligns with our clients' visions. Our media management services include drafting press releases for upcoming events, managing project-related Twitter and Facebook postings, and drafting newsletter recaps and summaries to post on website or provide to media outlets.



We understand that the purpose of a community-based strategic planning process is to create the opportunity for the community to voice their insightful and sincere input on Geneva's current state and how they want to see Geneva progress. Building a strong community starts with engaging the citizens. TPMA generates excitement within a community through media presence, and we translate the community's voice into a data-informed, intelligently designed report that will help guide the City of Geneva towards its vision.

## Your Project Team

TPMA has created a research team focused on facilitating an inclusive community-based engagement process to serve as the foundation for the City's next Strategic Plan update. The Project Team for this engagement includes industry leaders in the fields of economic and community development, research, analysis, and community engagement.

TPMA's extensive experience makes us uniquely qualified to assist the City of Geneva in collecting and analyzing the voices of its residents and stakeholder to develop its next strategic plan. The team that will lead this project has worked across the country with diverse regions, businesses and industries, and will bring their expertise and positive energy to the City.



**Andrew Carty** - Project Lead

Andrew will serve as Project Lead. He has extensive experience with facilitating strategic planning sessions and engaging community members and stakeholders to encourage participation and civic leadership. As Project Lead, Andrew will ensure all deliverables are received in a timely manner and SPAC and the City are satisfied with TPMA's work. Andrew is also responsible for overseeing the project approach and logistics for community meetings and events.



**Spenser Rohler** - Project Manager

Spenser will serve as Project Manager. He is an exceptionally talented researcher and wholeheartedly enjoys working with clients and stakeholders to ensure they remain informed on project matters and feel engaged throughout the project's timeline. As Project Manager, Spenser will be the primary point of contact with TPMA and be responsible for coordinating community meetings, stakeholder interviews, and reporting progress with SPAC and City staff.



**Jack Woods** - Project Support

Jack will serve as Project Support. Jack is remarkably personable and one of the hardest workers at TPMA. As Project Support, Jack plays a key role in ensuring both Andrew and Spenser have assistance during all phases of the project, and Jack will lend a hand in recording and summarizing feedback during community meetings and focus groups.



## Andrew Carty | Project Lead



Andrew is Assistant Director for Economic Development at TPMA and has been with the firm for close to two years. He has extensive project management experience with economic development and community development planning projects. In addition, he is a stakeholder engagement specialist who employs a variety of interactive methods to encourage innovative thinking, creativity, and to allow participants to freely express their views in a non-threatening atmosphere. At TPMA, he

has developed economic plans for municipalities improving local infrastructure in addition to the design of regional economic partnership plans. Most recently, he is serving as the Project Manager for a contract with the Kentucky Commission on Military Affairs, the Kentucky Cabinet for Economic Development, and the Kentucky Transportation Cabinet to conduct an economic impact study of the aerospace, aviation, and defense industries in the state. Prior to TPMA, Andrew consulted in strategic communications, helping Fortune 500 companies including Bank of America, Union Pacific, Kellogg, and AT&T engage with both internal and external stakeholders.

Andrew holds a Master of Public Affairs from the Indiana University Bloomington School of Public and Environmental Affairs. He received a Bachelor of Arts in Environmental Studies from Hendrix College in Conway, Arkansas.

### Selected Project Experience:

- **West Central Arkansas Planning and Development District/City of Hot Springs: City of Hot Springs Parking, Pedestrian, and Bicycle Enhancements Plan, AR, 2016** – Assisted the city and district to develop a plan for “complete streets” that incorporate ample parking along with safe, connected pedestrian and bicycle pathways and lanes.
- **Town of Cumberland: Mount Comfort Road Corridor Study, IN, 2016-2017** – Assisted the Town of Cumberland with a study to understand best ways to develop the Mt. Comfort Corridor, which connects it with the Town of McCordsville, utilizing hypothetical development scenarios and impact analysis.
- **Kentucky Commission on Military Affairs: Kentucky Aerospace, Aviation, and Defense Study, KY, 2016-2017** – Conducted an economic impact study and report on the aerospace and aviation and overall defense industry products manufacturing, distribution, and logistics industries within the Commonwealth.
- **City of Scottsbluff: Regional Economic Development Implementation Plan, NE, 2016** – Implemented Phase II of an economic development plan for the City of Scottsbluff and surrounding region. Designed an innovative regional partnership plan and inter-local agreement involving a restructuring of tax revenue to fund a regional trust for the implementation of economic development projects.
- **St. Louis Economic Development Partnership: Defense Diversification Strategy in International Trade, MO, 2016** – Completed an analysis of international trade opportunities related to St. Louis’ defense industry and developed recommendations for how national and international collaborations may strengthen economic growth and diversification.

### Spenser Rohler – Project Manager



Spenser is a Project Consultant with TPMA's Economic Development team and has been with the firm for just over four months. He specializes in research, data, and cost-benefit and program analyses. Spenser's background as an attorney enables him to apply economic research and data findings to our social systems which allows him to serve a diverse body of stakeholders.

Spenser's practice as an attorney included representation of individuals and businesses for their personal and financial needs, and he also worked to empower nonprofits and community members to achieve their goals of improving their communities. Client engagement is a primary focus for Spenser, and he brings the same approach of active listening and a personal interest in exploring difficult and complex issues to engaging community stakeholders. Spenser offers a unique combination of legal knowledge and economic development outlooks that allows him to meet client's goals and also encourage clients throughout challenging experiences. Spenser is determined to use economic development principles to help guide clients with strengthening local businesses and improving the quality of life for citizens.

He holds a Juris Doctor (J.D.) from the Maurer School of Law at Indiana University Bloomington and a Bachelor of Science in Kinesiology from Indiana University Bloomington.

#### Selected Project Experience:

- **NineStar Connect: Mount Comfort Corridor Development, IN, 2017** – Assisted the planning and building departments of the Town of McCordsville, the Town of Cumberland, and Hancock County in a multi-jurisdictional effort to develop a Uniform Zoning and Land Use Master Plan for spurring economic development along the Mount Comfort Road Corridor.
- **OK2030: Data Collection and Stakeholder Survey and Analysis, OK, 2017** – Assisted with providing the Oklahoma State Chamber with objective feedback on Oklahoma's business climate from senior business leaders and community stakeholders. This effort required conducting over 125 individual interviews with major stakeholders across the state, and synthesizing the data into a report on business-specific issues such as workforce quality, public education, taxation, regulation, infrastructure, and quality of life. Throughout this project, Spenser coordinated interview schedules and personally interviewed dozens of stakeholders throughout the State of Oklahoma.
- **Shelby County Development Corporation: Strategic Plan, IN, 2017** – Provided project management for engaging the SCDC Board Members and community stakeholders for developing a strategic plan to prioritize economic development initiatives, attract families and businesses, and improve the quality of life in Shelby County, Indiana. Spenser helped guide the SCDC Board Members towards prioritizing their community-wide goals, and interviewed Shelby County stakeholders to identify areas of improvement and ways for stakeholders to help grow the County.
- **Indiana Economic Development Association: Veterans Attraction Program, IN, 2017** – Provided project management for researching best tools and methods for developing an online platform to attract transitioning military veterans and their spouses to Indiana by matching their job skills and desired amenities with corresponding Indiana employers and communities.



## Jack Woods – Project Support



Jack is a Project Assistant on the Economic Development team and has been with the firm just under one year. He specializes in research and applies this to writing, editing, and drafting final deliverables for our clients. Much of Jack's work at TPMA focuses on communicating with clients and stakeholders to develop actionable recommendations aimed at solving economic development challenges.

Jack previously worked as a regional manager for USA Fireworks while in college. During that time, he oversaw twenty-one different stores over a two-year period and developed business management and leadership skills. He also had an internship at Case Pacer, a small tech startup located in downtown Indianapolis.

He received a Bachelor of Arts in History from DePauw University.

### Selected Project Experience:

- **WestGate@Crane Tech Park: Action Plan, IN, 2017** – Developed a business retention, expansion, and attraction plan for a Certified Tech Park located in Southwest Central Indiana. Jack worked with WestGate stakeholders to create an action plan the park should take related to marketing, branding, and amenities enhancements for tenants, to make the Park a more attractive place for businesses, and to improve the parks visibility to site selectors.
- **Wayne County Government: Strategic Plan, IN, 2016 – 2017** – Developed a strategic plan to improve Wayne County Government's operations. This included facilitating stakeholder engagement through individual interviews with County Government leadership and staff. Jack also assisted with the development of final recommendations.
- **St. Louis Economic Development Partnership: Missouri Defense Supply Chain Mapping, MO, 2016-2017** – Assisted with strategic planning based on data and information provided from the supply chain mapping process. Formed recommendations based on the strategic planning session and supply chain data aimed at strengthening and diversifying Missouri's statewide Defense Industry. These recommendations focused on making Missouri's defense industry less dependent on DoD contracts.
- **Angola First Development: Action Plan, IN, 2017** – Worked with the stakeholders of a proposed technology park in Angola Indiana to identify target industries. This project will also include an action plan with measurable objectives that will provide business retention, attraction, and expansion solutions related to the identified target industries, and economic development challenges Angola has faced.
- **Pulaski Technical College: Strategic Plan, AR, 2016 – 2017** – Created a four-year Strategic Plan in a four phase process for Pulaski Technical College in North Little Rock, Arkansas that identifies PTC's mission, vision, values, and priorities as well as resources necessary to actualize the plan.

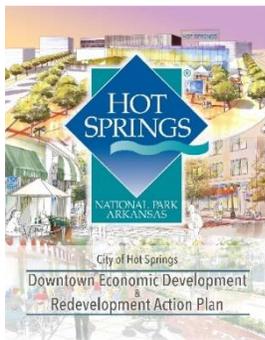
## Project Examples

### West Central Arkansas Planning and Development District and the City of Hot Springs: Downtown Development and Redevelopment Action and Parking Improvement Plans | Arkansas | 2015 - 2016

From 2015-2016, TPMA worked with the community of Hot Springs, Arkansas to create a unified Downtown Development and Redevelopment Action Plan. The goal of the planning process was to move the City's downtown forward with a plan that incorporated development and redevelopment site planning with strategies to promote downtown as both a thriving destination for visitors and a center of job creation, innovation, and entrepreneurship. TPMA gathered input from 450 community stakeholders during several facilitated community engagement sessions to guide development of the plan. The collective vision and passion of participants for downtown was captured in an asset-based plan and implementation strategy, now being used to build quality of life and sense of place in downtown Hot Springs.



Information on the full plan is available here: <http://www.cityhs.net/517/Downtown-Economic-Development-Redevelopm>.



Additionally, TPMA worked on a Phase II project, creating a Parking Improvement Plan for the downtown. The focus aimed to specifically resolve downtown parking issues (availability, accessibility and visibility) and concepts for low-cost, tactical urbanism projects to test and inform the designs of new permanent pedestrian and bicycle facilities and amenities. We conducted additional focus groups, interviews, a public open house, other stakeholder engagement, and reviews by implementation partners. The Parking Improvement Plan identified specific responsibilities for project leaders, partner organizations, policy changes, funding sources and champions for each of the action steps proposed. Major recommendations included the establishment of a Parking Authority to manage downtown parking, acquisition of or negotiated leasing of existing private parking facilities, and the construction of a bike trail and additional pedestrian space using an existing lane of on-street parallel parking.

The City of Hot Springs recently approved an application for federal funds to make significant improvements suggested from our planning work including widening sidewalks in several areas for restaurants that have asked for outdoor dining and adding another level and 80 parking spaces to an existing downtown parking garage.



## City of Scottsbluff Economic Development Study and Implementation Plan | Nebraska | 2014 - 2015



TPMA worked with Scottsbluff, Nebraska to create a Regional Economic Development Strategic Plan for the Scottsbluff-Gering region. Our work included a high level of public and stakeholder participation at the outset, during which we were able to help focus the community's goals and objectives. TPMA then

conducted evaluations of the area's current demographics and economy. We also conceptualized downtown development projects and the quality of life assets necessary to support these. Our research and market analysis formed the basis of an ambitious but achievable plan. Strategy and action steps in the plan address a broad range of categories, including physical redevelopment of corridors, greenfield development, entrepreneurship, tourism, public-private partnership opportunities, and workforce development.

After the plan was finalized, the City again selected TPMA to help launch the plan into action. The plan recommended several concrete steps to hone the City's efforts on business retention, expansion, and attraction. TPMA helped implement these steps and provided pre-assessment of seven sites targeted for redevelopment.

## Knox County Development Corporation: Strategic Planning | Indiana | 2015-2016

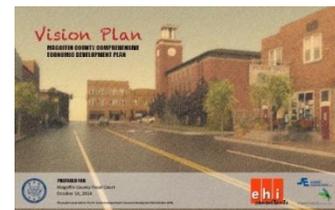


TPMA partnered with the Knox County Development Corporation (KCDC) to conduct a board retreat to strategize and build on their vision. This retreat provided the foundation for TPMA and KCDC to begin a planning process that developed a fundable and implementable economic development strategy for the Knox County region.

Our process focused on economic data, a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis, and public engagement. In addition, this planning process incorporated valuable input on economic development priorities and built consensus around KCDC's future direction of economic development in the county. Other topics include the county's business climate, community champions, industry targets, incentives, and more. An electronic survey was distributed to gather further qualitative input from county stakeholders and TPMA conducted best practice research on regional, national, and global trends in key industry clusters.

## Magoffin County: Comprehensive Economic Development Plan | Kentucky | 2014

After Salyersville, the largest community in the County, suffered major damage from a tornado, TPMA was contracted, in partnership with EHI Consultants and Summit Engineering, to create a Comprehensive Economic Development Plan for Magoffin County, Kentucky. Conducting an assessment of the county's assets and challenges in relation to an identified focus area for future development, TPMA completed a target industry analysis, labor market assessment, downtown redevelopment plan, and an entrepreneurial/small business center best practice scan. Recommendations in the plan focused on workforce development, quality of place, small business development, innovation and entrepreneurship, community partnerships, and adventure tourism.



## Vermillion County Economic Development Corporation: Business Retention & Expansion (BRE) Program | Indiana | 2016



TPMA was hired to develop a Business Retention & Expansion (BRE) program for the Vermillion County Economic Development Corporation (VCEDC), which provides economic development services to

businesses in Vermillion County, a rural Indiana county that continues to plan for economic diversification after the loss of its former U.S. Army facility. This multi-faceted project began with a SWOT analysis that was conducted with the VCEDC Executive Director to help guide and design the BRE program to meet Vermillion County's specific needs. A summary of the SWOT analysis was provided to the client to develop the BRE program, which includes the BRE infrastructure, a list of Vermillion County businesses, BRE business survey, and a BRE database to capture and analyze data. The BRE infrastructure includes policies, researched best practices, and action guides for the Executive Director. The list of businesses includes business name, sector, contact, and other specific data for the companies in the County. The BRE survey is a document that is able to be printed or emailed, capturing crucial information such as retention threats, growth opportunities, and the business community's satisfaction with business and public services that affects their operations in Vermillion County. TPMA additionally developed a BRE database to capture, organize, analyze and report aggregate business data and manage the business relationships in Vermillion County.

## Southeast Kentucky Economic Development (SKED): Feasibility Study for Economic Development Projects | Kentucky | 2016-2017

TPMA was selected by Southeast Kentucky Economic Development Corporation (SKED) to conduct an economic development feasibility study designed to identify important development projects to create jobs in twenty-six negatively-impacted coal counties in Eastern Kentucky. SKED received a grant from the U.S.



Department of Commerce's Economic Development Administration (EDA) to conduct a feasibility study to identify both short and long-term economic development projects. TPMA helped SKED identify eight economic development projects that would capitalize on the KentuckyWired and other broadband infrastructure and create jobs those counties negatively impacted by the reduction of jobs in the coal industry.

The project gave Eastern Kentucky communities, business owners, and leaders an opportunity to take greater advantage of what broadband has to offer. The short-term projects were required to have strong community support, be completed in six to twenty-four months, and have a high-impact on job creation. TPMA, SKED, and project partners also identified long-term projects that required to have additional planning and funding. The process consisted of data analysis on the available workforce, analysis on business sites and buildings, economic impact analysis, engineering analysis, fiber and broadband installation plans, and other evaluation activities. Projects were further ranked based on number of created jobs, wages, cost, readiness, local support, and other relevant variables.



## Northwest Central Illinois (NCI): Community Audit and Underemployed Survey | Illinois | 2017



TPMA conducted a Community Audit, which brought together economic, labor, and community resource information in a format that served as a cornerstone for the Regional Strategic Workforce Strategy, providing an overall picture of the structure and composition of the included eight-county economy and a detailing of the resources available in the Northwest Central Illinois region.

The Audit and the resulting information permitted stakeholders the ability to assess the region's competitive position, develop appropriate workforce development strategies, and ensure the region's ability to grow and prosper in an ever-changing world.

## Lucas County Workforce Development Board: Strategic Plan | Ohio | 2016

TPMA developed a four-year regional workforce strategic plan for Lucas County, Ohio (includes Toledo). We utilized surveys (distributed to community partners, businesses, and job seekers), focus groups (with input from businesses and community partners), and strategic planning sessions to collect qualitative data on regional workforce system strengths, challenges, and opportunities.



In addition, TPMA we completed a regional workforce data analysis to provide quantitative data to support the region's strategic priorities. TPMA facilitated a regional planning session where new Vision and Mission Statements were adopted and multiple goals were crafted to assist in the alignment of partners and the betterment of the Lucas County community.

## Our Equal Employment Opportunity Practices

### Equal Employment Opportunity Policy

To provide equal employment and advancement opportunities to all individuals, employment decisions at Thomas P. Miller & Associates, LLC (TPMA) will be based on merit, qualifications, and abilities. TPMA does not discriminate in employment opportunities or practices on the basis of race, color, religion, sex, sexual orientation, gender identity, national origin, age, disability, or any other characteristic protected by law.

TPMA will make reasonable accommodations for qualified individuals with known disabilities unless doing so would result in an undue hardship. This policy governs all aspects of employment, including selection, job assignment, compensation, discipline, termination, and access to benefits and training.

Any employees with questions or concerns about any type of discrimination in the workplace are encouraged to bring these issues to the attention of their immediate supervisor or human resources representative. Employees can raise concerns and make reports without fear of reprisal. Anyone found to be engaging in any type of unlawful discrimination will be subject to disciplinary action, up to and including termination of employment.

### Sexual and Other Unlawful Harassment Policy

TPMA is committed to providing a work environment that is free of discrimination and unlawful harassment. Actions, words, jokes, or comments based on an individual's sex, race, ethnicity, age, religion, color, national origin, disability, or any other legally protected characteristic will not be tolerated. As an example, sexual harassment (both overt and subtle) is a form of employee misconduct that is demeaning to another person, undermines the integrity of the employment relationship, and is strictly prohibited.

Sexual harassment often is not as noticeable as other forms of prohibited harassment; therefore, the problems inherent in sexual harassment demand special attention and awareness. Unwelcome sexual advances, requests for sexual favors and other verbal or physical conduct of a sexual nature are not appropriate in our work environment and will not be tolerated or condoned.

Sexual harassment does not refer to comments, compliments and contacts that are acceptable in a professional workplace. Unlawful sexual harassment is a form of sex discrimination and occurs when:

- Submission to such conduct is made explicitly or implicitly a term or condition of an individual's employment; or
- Submission to or rejection of such conduct by an individual is used as a basis for making employment decisions affecting the individual; or
- The conduct has the purpose or effect of unreasonably interfering with an individual's work performance or creating an intimidating, hostile or offensive work environment.

Any employee who wants to report an incident of sexual or other unlawful harassment should promptly report the matter to his or her supervisor. If the supervisor is unavailable or the employee believes it would be inappropriate to contact that person, the employee should immediately contact the Human Resources Manager or any other member of management. Employees can raise good faith concerns and make good faith reports without fear of reprisal.



Any supervisor or manager who becomes aware of possible sexual or unlawful harassment should promptly advise the Human Resources Manager or any member of management who will handle the matter in a timely and confidential manner.

Anyone engaging in sexual or other unlawful harassment will be subject to disciplinary action, up to and including termination of employment.

## Scope of Required Services

### Project Understanding

The City of Geneva (the City) desires to update its current strategic plan by utilizing data and qualitative feedback gained from community members, stakeholders, and city officials. The City's approach of including the community in the strategic planning process dates back to 1996 and gained enough popular traction that the City created the Strategic Plan Advisory Committee (SPAC) to champion the plan and encourage the public's contribution for realizing the plan. The long-term goals and objectives in the strategic plan are used by the City Council and management staff during their yearly workshop to prioritize activities for the year when developing the City's budget. Thereafter, the City Council assigns goals and objectives to the City Departments, who evaluate, prioritize, and budgets accordingly in order to accomplish the goal. This top-down approach to realizing the strategic plan's long-term goals is overseen by the City Administrator and ensures that responsibility for implementation is delegated across the municipality.

TPMA is firmly committed to working with the City of Geneva over four months, beginning in August 2017, to complete a community-based engagement process by the end of November 2017. We believe that this is a reasonable timeline for the collection and analysis of all data. The Key Theme Report developed through this process will also outline recommendations for the City that build off of the positive aspects of the previous strategic plans, and yet offer an original and customized approach will lead the City of Geneva towards reaching its goals and objectives.

### Phase I: Discovery, Informing, Organizing

#### Project Launch Call

TPMA will facilitate a project launch call with the City of Geneva to ensure coordination and efficiency. The call will help to confirm expectations for conducting research and analysis; identifying key dates; and preparing the final report. We will focus on obtaining direction, anticipated outcomes, and potential resources that will complement TPMA's independent research. Further, we will request any unique information regarding specific previous plans or data that may be helpful to understand in advance of the engagement activities in Phase II.

***Deliverables: Summary of Discussion***

***Timeline: August 2017***

#### Media Support

Throughout the project, TPMA will work with SPAC and City staff to identify key topics and messages to promote in newsletters, articles, the City's website, and on social media platforms. In Phase I, we will coordinate with the City to ensure that brand standards and expectations for unilateral and coordinated development are outlined thoroughly. If it is determined that TPMA will administer social media content, we will ensure that SPAC and/or City staff first reviews and approves of all content before it is posted.



### Online Presence

Community engagement activities often trigger very worthwhile discussions. To sustain these conversations and expand participation in them, we will utilize the City's website to act as a sounding board for gathering data, prioritizing ideas, and implementing the future strategic plan. The TPMA team can develop content for inclusion on the City website explaining the strategic planning process, promoting upcoming public meetings, and integrating additional information. Items and messages to be displayed may include:

- Completed exercises that solicit community preferences
- Questions from the interviews to encourage wider community participation
- Listings of upcoming meetings
- Links to facts, data, and updates on the strategic planning process

***Deliverables: Press Releases; Newsletter Articles; Social Media Content; Web Platform Content***

***Timeline: August – November 2017***

### Identifying and Engaging Key Stakeholders

TPMA will work with the City to identify and designate the means for engaging internal and external stakeholders through interviews, focus group conversations, and community meetings.

We will facilitate a teleconference call with the SPAC to discuss logistics for all three stakeholder engagement activities. The goal will be to discuss the following points:

- Begin recommending and identifying names and contact information of key stakeholders;
- Identify dates, times, and location(s) for public meetings and focus groups;
- Discuss potential topical areas to cover in focus groups and interviews, which should include satisfaction, impact, and implementation success of the seven visions and subcategorized goals in the City's current Strategic Plan;
- Determine how these meetings and focus groups will be promoted to the public; and
- Address concerns, desires, and any other details with the City of Geneva.

Further, TPMA will develop draft invitation samples specific to each type of activity and work with the City and SPAC to begin distributing these invitations through the appropriate channels.

***Deliverables: Identified Stakeholder List; Participation Invitation Samples***

***Timeline: August 2017***

### Data Collection Protocols

TPMA will then work with the City to refine feedback and develop clear protocols in scheduling, preparing for, conducting, and following up on all stakeholder engagement activities. Protocols will be important to establish a consistent process when obtaining the qualitative data that will guide the development of the strategic plan. Protocols will also support logistics by ensuring that interviews, focus groups, and community meetings stay on topic and on time.

***Deliverables: Protocols and Confirmed Questions***

***Timeline: August 2017***

## Phase II: Conducting the Research

### On-Site Community Meetings

The stakeholder engagement process will include up to two (2) two-hour community meetings to explain the purpose and benefits of strategic planning, and to gather public input on the community's vision, desired goals and objectives, and the overall quality of life within Geneva, including but not limited to discussions concerning public education, satisfaction with leadership, and community needs. To offer residents ample opportunity to attend a session that fits into their schedule, these meetings will be offered on the same day with one session held in the morning and one in the evening. We will ensure that SPAC and City staff approve of all discussion topics and give recommendations for topics before each community meeting.

During the Community Meetings, we will return to Geneva to employ a variety of interactive exercises to encourage innovative thinking, creativity, and to allow participants to freely express their views in a non-threatening atmosphere.

The TPMA team will provide an overview of the initiative and engagement process and ask participants to express their own vision of what the City should aspire to be. We will emphasize that each individual's opinion is essential to the planning process. We have used a number of creative (and fun) tools in the past to garner input while encouraging group interaction, consensus building, and individual expression. The SPAC will be asked to assist in selecting the appropriate tools for the sessions. However, based on our extensive experience facilitating public input forums, some highly effective activities we would recommend include:

- **Speed Issues** – Similar to the “speed dating” concept, participants move in small groups from table to table when a bell sounds. At each table, a volunteer will reveal a topic such as parks, downtown, tourism, jobs, schools, etc. Participants then have a set amount of time to list their ideas on that topic.
- **Put Your Money Where Your Ideas Are** – Attendees are given stickers representing various levels of investment. They use these stickers to vote on spending priorities by placing the stickers on sheets containing ideas generated by small groups during the forum. This helps the TPMA team prioritize action items and provide part of the basis for public and private investors to make decisions about funding priorities.
- **Headlines From the Future** – This is an individual exercise where participants receive a mostly blank template of a newspaper front page. Different sections of the page are marked with “department” names (news, sports, recreation, arts & entertainment, etc.), and participants can add headlines, stories, pictures, or drawings if they are so inclined.
- **Visual Preference Survey** – For this activity, TPMA shows slides depicting a wide variety of places and initiatives from other communities. Participants will receive a rating sheet to rate each image on a scale from -5 to +5 and comment what they did or did not like about the image. This is designed to address quality of place issues.

Often a combination of exercises are used during the same forum to assure everyone can find a comfortable way to communicate their ideas. We will also provide a handout with some open-ended questions so that participants can “Tell us what we missed...” so residents and stakeholders have every opportunity possible to contribute.



We will collect email addresses from attendees so we can update them regularly on our progress. Email marketing will be utilized to promote the City's website, social media pages, and to garner more input on the project.

***Deliverables: Community Meeting Summaries***

***Timeline: September 2017***

## On-Site Stakeholder Interviews and Focus Groups

In addition to the community meetings, TPMA will conduct a suite of focus groups and one-on-one stakeholder interviews. Working with the City and the SPAC, we will engage up to 20 stakeholders through one-on-one interviews over the course of the project along with key topics to be discussed. TPMA will complete as many in-person interviews as possible while on-site with the focus groups. TPMA will record each interview, with the interviewee's permission, to ensure details and context are not missed. Supplemental interviews will be completed remotely through phone or video conference as needed.

Additionally, the TPMA team will conduct up to eight (8) one-hour focus groups at a location provided by SPAC and City staff. We will target partners in areas of the SPAC's choosing for further input. We recommend each focus group be comprised of a cross-section of local residents, including, but not limited to, high school students, parents involved in the school system, teachers, local officials, leaders of nonprofit organizations, health care providers, etc. Key topics to be discussed in the stakeholder interviews and focus groups could include:

- **Vision** – What do the stakeholders personally envision for the future of Geneva? What is the capacity for a variety of visions? What community and social needs must be addressed?
- **Assets** – What are Geneva's greatest assets? Which assets are underutilized? Which assets can be best leveraged for future growth? What are the most critical sites for infill development?
- **Current Initiatives** – What aspects of the current strategic plan are working? What are the gaps? How will the City implement its objectives? How do the City goals align with regional plans?
- **Retention and Expansion of Key Local Businesses** – What opportunities are missing for nurturing existing enterprises? Is the current business retention program effective?
- **Entrepreneurship** – What initiatives are in place to target and assist start-up companies and entrepreneurs in Geneva? What challenges exist that hinder these efforts?
- **Financing Projects** – What is the effectiveness of current financing tools? What metrics can the City use to track growth and progress? What are the gaps in financing business attraction, retention, and expansion efforts?
- **Workforce** – How would you rate the skills and availability of Geneva's workforce? What partnerships exist with education institutions such as the University of Illinois or Geneva's public school system to ensure a quality talent pipeline for local industry? Is there a need to realign public education to meet future workforce needs?
- **Connectivity** – How do transportation assets affect business and quality of life in Geneva? How can the Metra system be leveraged for economic development purposes in the region? Outside the region?
- **Technology** – How is broadband infrastructure being leveraged to drive business growth and quality of life improvements? What role does broadband play in increasing community competitiveness and productivity? Do digital skill gaps exist?

- **Roles, Responsibilities, and Accountability** – Who should be responsible for identified objectives? Who should be accountable to whom, and how should the community monitor accountability?

For each group session, TPMA will have at least one Project Team member take notes and one facilitate the session. We will record all conversations with audio equipment (with consent from participants) to ensure details and context are not lost. After each focus group, TPMA will analyze the discussions and notes and organize all data into major themes and concepts, which will then be integrated into the final Report.

**Deliverables:** *Interviews Summary, Focus Group Summary*  
**Timeline:** *September - October 2017*

## Phase III: Analyzing and Synthesizing Findings

### Data Analysis

TPMA will conduct an analysis of the data obtained from all stakeholder engagement activities. A framework will be developed and employed to capture and organize the consistent themes identified. We will assure consistency and accuracy through several follow up engagements. These include an internal interviewer validation session and coordination with the City leadership and SPAC.

**Deliverables:** *Theme Framework*  
**Timeline:** *October 2017 – November 2017*

### Key Theme Report

TPMA will incorporate all themes and analysis from community meetings, focus groups, and stakeholder interviews into a Key Theme Report to assist the City Council at the annual strategic planning workshop in November. The Report will provide a summary of the project, outline research methods, and detail findings. All data utilized in the Report will be synthesized to enhance clarity, identify common themes and trends, and avoid redundant and overlapping information.

**Deliverables:** *Draft Report*  
**Timeline:** *October 2017*

### City Council Workshop and Final Report

TPMA will present the Report at the annual City Council strategic planning workshop scheduled November 3<sup>rd</sup>, 2017. Our presentation will detail our findings, and solicit input on the Report's findings. All feedback will be documented and incorporated into the final Report as necessary. Immediately after the strategic planning workshop, TPMA will review collected feedback with the City and SPAC and develop a plan for making any desired edits and providing the electronic and hard copies of the final Report to SPAC and City staff. The final plan will be provided in an electronic format suitable for printing and posting on websites.

**Deliverables:** *Council Workshop Feedback Summary; Finalized Report*  
**Timeline:** *November 2017*



## Proposed Schedule of Implementation

TPMA anticipates a four month project with an approximate project start date in early August, 2017, but will work directly with the City to determine an appropriate project launch date. We anticipate a project timeline of roughly four months, culminating in a Key Themes Report submitted to the City and workshop help with the City Council. We acknowledge the need to complete all research and analysis and to provide a draft report for review no later than November 3rd, 2017. An estimated timeline is provided below and broken out accordingly, with an \* denoting on-site meetings and activities.

Proposal Timeline		Aug	Sept	Oct	Nov
Phase 1	Project Launch Call				
	Media Support				
	Identifying and Engaging Key Stakeholders				
	Data Collection Protocols				
Phase 2	On-Site Community Meetings		*		
	On-Site Stakeholder Interviews and Focus Groups		*	*	
Phase 3	Data Analysis			*	*
	Key Theme Report				
	City Council Workshop and Final Report				*

We view our clients as partners and take pride in working with them to move items from ideas to written goals to tangible results. TPMA utilizes a three phase approach when performing strategic planning exercises:

- Discovery** – Phase 1 of the strategic planning public engagement process will commence in early August with a project launch call between TPMA and SPAC and City staff to coordinate information, confirm expectations, and identify key dates. TPMA will work with SPAC and City Staff on identifying key messaging and ensuring brand standards are met and messaging efforts are on point. Additionally, TPMA will help identify stakeholders and determine logistics for community meetings and focus groups, and work with SPAC and City staff to develop clear protocols for community and stakeholder engagement activities.
- Conducting the Research** – During Phase 2, TPMA will engage with community members and stakeholders to gather public input on the community’s vision, desired goals and objectives, and the quality of life in Geneva. We will conduct focus groups and individual stakeholder interviews and work with SPAC and City staff to determine key topics to be discussed.
- Analyzing and Synthesizing Findings** – Utilizing the data collected during Phase 1’s document review and Phase 2’s stakeholder and community engagement activities, TPMA will organize the data to identify themes and trends, and analyze the findings within the context of SPAC and the City’s approach to updating the strategic plan.

## References

TPMA has extensive experience with writing strategic plans at the local, regional, and state levels Nationwide. Our writing process is focused on implementation, ensuring that clients are equipped with an action plan that offers the knowledge and steps required to perform and monitor each step of the plan. Our staff is highly educated in the areas of business and public administration, and we have extensive experience with local government agencies and their processes, which is used in every planning process to achieve results.

TPMA encourages municipalities to utilize data gathering and stakeholder engagement to assess current activities and drive strategic priorities. We have helped bring together a wide variety of stakeholders, including state and local officials, employers and key members of the business community, economic development representatives, educational institutions, and the general public.

We view our clients as partners and takes pride in moving items from paper into tangible results. We have been particularly successful at translating completed research, analysis, and planning efforts into implementation activities tailored to the assets and opportunities of each client. Our same commitment to data gathering and community engagement will drive the vision for the City of Geneva’s future strategic planning process.

West Central Arkansas Planning and Development District and the City of Hot Springs: Downtown Development and Redevelopment Action and Parking Improvement Plans | Arkansas | 2015 - 2016

- **Contact:** *Dwayne Pratt, Executive Director, West Central Arkansas Planning and Development District*
- **Address:** *1000 Central Ave., Hot Springs National Park, AR, 71901*
- **Phone:** *501.525.7577*
- **Final Report:** <http://www.cityhs.net/517/Downtown-Economic-Development-Redevelopm>

City of Scottsbluff Economic Development Study and Implementation Plan | Nebraska | 2014 – 2015

- **Contact:** *Nathan D. Johnson, City Manager, City of Scottsbluff*
- **Address:** *2525 Circle Dr., Scottsbluff NE, 69361*
- **Phone:** *308.630.6202*
- **Final Report:** [http://www.scottsbluff.org/TPMA\\_Final\\_Report.pdf](http://www.scottsbluff.org/TPMA_Final_Report.pdf)

Lucas County Workforce Development Board Strategic Plan | Ohio | 2016

- **Contact:** *Michael Veh, Director of Business and Workforce Services, Lucas County Department of Planning and Development*
- **Address:** *1 Government Center, Suite 800, Toledo, OH 43604*
- **Phone:** *419.285.6992*
- **Final Report:** <http://www.workreadylucascounty.com/clientuploads/WDB%20Documents/LucasCountyWorkforce%20Strategic%20Plan%20Final.pdf>



## Concluding Remarks

TPMA is unique firm that truly desires to change the world for the better. Our company employs diverse and talented individuals with various skill sets and educational backgrounds. We have discovered how to combine their skills and experiences to offer clients applicable results and real-world solutions.

We understand that change comes from within, both at the individual and community level, and we enjoy encouraging communities to unite and develop a unified vision, and then facilitate the creative process to show them the path to reach their vision.

We very much look forward to working with the City of Geneva and SPAC, and, based on our success from past clients, we know that you will be impressed with the results we will provide.

## Cost Proposal

This Scope of Work will be performed for a fixed, not to exceed amount of **\$37,515.00** (inclusive of travel, administration and all fees).

The not to exceed fee is broken out by task as follows:

	Task	Budget
Phase 1	Project Launch Call	\$1,339.67
	Media Support	\$2,698.67
	Identifying and Engaging Key Stakeholders	\$1,738.67
Phase 2	Data Collection Protocols	\$1,684.67
	On-Site Community Meetings	\$5,482.67
	On-Site Stakeholder Interviews and Focus Groups	\$8,188.67
Phase 3	Data Analysis	\$1,684.67
	Key Theme Report	\$2,818.67
	City Council Workshop and Final Report	\$5,074.64
	Travel Expenses	\$6,804.00
	Total	\$37,515.00

TPMA's invoices shall be submitted to the City monthly with a strong preference on percent completion-basis. Invoices could also be submitted even monthly or on deliverable-completion basis, upon consultation and negotiation with the City of Geneva. The cost of additional site visits, as well as any change orders or time extensions, will also be determined as needed upon consultation and negotiation with the City.



## Modified Scope and Fee for Contracting Services

This Modified Scope and Fee for Contracting Services (Modified Scope) is prepared for the City of Geneva, IL (the City) in response to the City's requested adjustments related to Thomas P. Miller & Associates' (TPMA) response to the RFP: *Strategic Plan Public Facilitator*, re-issued by the City in June of 2017.

### Approach

To better meet the City's needs, TPMA will reduce its proposed scope of services in the following areas:

1. Media Support;
2. On-Site Stakeholder Interviews and Focus Groups;
3. Additional Services Associated with On-Site Stakeholder Interviews and Focus Groups; and
4. Travel Expenses.

These adjustments are explained in greater depth below, and an updated fee estimate to reflect the Modified Scope is provided.

### Media Support

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TPMA has reduced its proposed media support services based on the understanding that the City has a dedicated staff member capable of assisting with media functions for this project and that the City has no expectation for TPMA to administer content or develop graphically-designed content. TPMA will provide media support to the City to develop narrative content only.

### On-Site Stakeholder Interviews and Focus Groups

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To reduce the cost of services, TPMA recommends that the City limit its external stakeholder engagement efforts to two (2) community meetings and ten (10) individual stakeholder interviews. To reflect this change, TPMA will not conduct the proposed focus groups, and has reduced the proposed number of stakeholder interviews from twenty (20) to ten (10). . Additionally, TPMA will reduce travel costs by consolidating the proposed two on-site community meetings with the ten stakeholder interviews into one (1) on-site visit. For the duration of the project, TPMA will execute only two (2) on-site visits: 1) to conduct the two community meetings and ten stakeholder interviews, and 2) to conduct the City Council Workshop. TPMA will not execute any additional on-site visits if all ten stakeholder interviews cannot be scheduled during the same time period as the two community meetings. In that scenario, any additional interviews would be completed via teleconference.

### Other Services Associated with On-Site Stakeholder Interviews and Focus Groups

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TPMA has adjusted pricing to reflect the change in services pertaining to On-Site Stakeholder Interviews and Focus Groups. The scope of work for the following tasks has been reduced accordingly to reflect the Modified Scope: Identifying and Engaging Key Stakeholders, Data Collection Protocols, and Data Analysis.

### Travel Expenses

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TPMA has reduced the number of proposed on-site visits from three (3) to two (2). Travel expenses have been reduced by removing a proposed multi-day, on-site visit planned for conducting stakeholder interviews and focus groups. In addition, TPMA commits to traveling to and from Geneva via car, rather than air, further reducing expenses for each on-site.

### Fee and Hours Breakdown

This Scope of Work will be performed for a fixed, not to exceed amount of \$22,170.00 (inclusive of travel, administration, and all fees). We have rounded estimates for the following tasks up or down by less than \$1 to provide a cleaner view of the proposed fee: Project Launch Call; On-Site Community Meetings; Key Theme Report; and City Council Workshop and Final Report.

The updated, not to exceed fee for this Modified Scope is broken out by task as follows:

	Task	Budget
Phase 1	Project Launch Call	\$1,340.00
	Media Support	\$960.00
	Identifying and Engaging Key Stakeholders	\$1,275.00
Phase 2	Data Collection Protocols	\$1,080.00
	On-Site Community Meetings	\$5,483.00
	On-Site Stakeholder Interviews	\$1,460.00
Phase 3	Data Analysis	\$1,275.00
	Key Theme Report	\$2,818.00
	City Council Workshop and Final Report	\$5,075.00
	Travel Expenses	\$1,404.00
	<b>Total</b>	<b>\$22,170.00</b>

The cost of additional on-site visits, as well as any change orders or time extensions, will be determined as needed upon consultation and negotiation with the City of Geneva.

