
PROPOSAL TO
TOWN OF BLADENSBURG
FOR
STRATEGIC PLANNING SERVICES

November 21, 2014

**Management
Partners**





November 21, 2014

Mr. John Moss
Town Administrator
Town of Bladensburg
4229 Edmonston Road
Bladensburg, Maryland 20710

Dear Mr. Moss:

The practice and discipline of elected officials and administrative leaders developing a strategic plan speaks to the commitment of the Town of Bladensburg to align goals and strategies for service delivery with community priorities. Management Partners is well-qualified to assist with the development of a strategic plan, including data analysis, a review of benchmark organizational models, SWOT analysis, services preference ranking, and a workshop with members of the Strategic Planning Committee.

Management Partners is a professional management consulting firm specializing in helping local government organizations meet service demands, improve effectiveness and streamline operations. Our clients benefit from the expertise of professionals with extensive experience in all aspects of public management and knowledge of how the best jurisdictions in the country provide services. We have an extensive and a proven track record of quality service to numerous local governments throughout the United States.

As instructed in the RFP we make the following declarations: This proposal is genuine, and not sham or collusive, nor made in the interest of or in behalf of any person not herein named; the proposer has not directly or indirectly induced or solicited any other proposer to put in a sham bid, or any other person, firm or corporation to refrain from submitting a proposal; and the proposer has not in any manner sought by collusion to secure for themselves an advantage over any other proposer. Additionally, Management Partners is not involved in any pending litigation that affects our ability to successfully complete this project, nor the financial stability of Management Partners.

All communications regarding this proposal can be directed to me in our Cincinnati office (address, phone and fax numbers listed below) or to jnewfarmer@managementpartners.com. We are pleased to have the opportunity to submit a proposal for this important project.

Sincerely,

A handwritten signature in cursive script that reads "Gerald E. Newfarmer".

Gerald E. Newfarmer
President and CEO

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METHODOLOGY AND WORK PLAN

In this section, we describe our overall approach to strategic planning and board facilitation and provide a proposed work plan to meet the needs of the Town, as outlined in the RFP.

Our Role in Strategic Planning

The value of using Management Partners to facilitate the strategic planning process is twofold: first, we provide an independent, objective perspective and second, our skills in developing strategic planning processes and facilitating workshops will ensure that your efforts result in a well-constructed strategic plan.

Our facilitators will spend time talking with Council members, the Administrator, directors and other members of the Planning Committee in individual interviews to draw out perceptions, insights, and ideas about Bladensburg, which will form the basis for the workshop discussions. We will perform a high-level SWOT analysis by gathering strengths, weaknesses, opportunities and threats during our interviews and from other Town leaders, staff, and community stakeholders. Management Partners will also work closely with Bladensburg employees to prepare an environmental scan to assess internal and external trends and projections that will inform and influence plan goals and strategies.

In addition to the high-level SWOT and individual interviews, we will also prepare and distribute a survey that will allow Bladensburg residents and stakeholders the opportunity to identify preferred services of the Town by ranking service preferences. The information on service preferences will complement a review and benchmarking of service levels provided by the Town.

Management Partners will facilitate the development of vision and mission statements, core values, goals and strategies during a strategic planning workshop. Our strategic planning workshops are engaging and interactive and designed to ensure full participation. Because we are former local government practitioners, we are attuned to drawing out workshop participants to clarify issues. We understand from experience how to address sensitive issues in a neutral, non-confrontational manner. We are adept at thoroughly engaging participants such that key issues are discussed prior to making decisions.

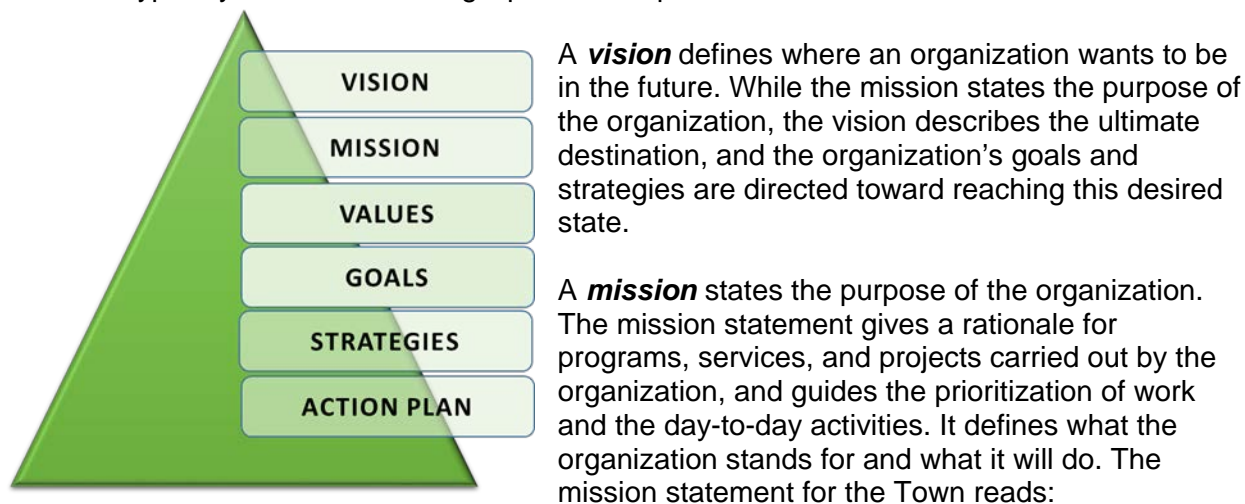
We design strategic planning processes for local governments of all kinds, with an emphasis on how strategic planning drives organizational work planning, service quality, and results. A strategic plan is a critical part of your organization's management system and informs resource allocation, performance management, and employee evaluation. As we are working with you on the workshop and resulting plan, we will ensure it aligns with the existing strategy deployment and reporting processes of the Town.

About Strategic Planning

Before we describe our proposed approach to developing a strategic plan for the Town of Bladensburg, we would like to describe the elements of strategic planning that we will consider as we proceed collaboratively with your project team. Strategic planning is fundamental to successful work planning and aligning the goals of the organization, as established and adopted by Town Council, with annual budget processes and the intelligent use of resources. Annual review and updating of the strategic plan ensures that current realities (internal and external) are taken into consideration and appropriately factored into the operations of the organization.

Strategic planning involves establishing a vision for the future, a clear mission for the organization, articulating the organization's values, preparing an environmental scan that identifies the factors affecting the organization, establishing goals, identifying priority strategies, and creating implementation action plans. Our approach for the Town of Bladensburg will be tailored to the specific needs of the Town and based upon the existing process.

The following defines the key components of strategic planning and provides an overview of the elements typically involved in strategic plan development.



As the website states, the Town of Bladensburg's purpose is to serve the best interests of the community by:

- Providing for its safety and well-being;
- Respecting its special, small-town character and quality of life;
- Providing superior public services;
- Sustaining the public trust through open and responsive government; and
- Maintaining the stewardship and preservation of its financial and natural resources.

The Bladensburg motto is "Responsible and Responsive Government."

As part of this process we will work with members of the Strategic Planning Committee to develop a vision and mission statement that captures the future direction of Bladensburg, as well as its day-to-day purpose and functions.

The **values** of an organization drive the perspective and actions of members in the organization as they implement strategic plan goals and strategies.

An **environmental scan** is prepared as part of a strategic planning process in order to identify the factors that are influencing the organization now and are likely to affect it in the future. Typical factors include operation trends and projections, services, fiscal constraints and opportunities, service demand drivers, policy issues, legislation, demographic characteristics of the community, and workforce issues. A SWOT (strengths, weaknesses, opportunities, threats) analysis is part of the environmental scan.

Goals for achievement over several years are set as part of the process. Goals are closely aligned with the vision and state the direction the Town of Bladensburg will move and the

desired outcomes to be achieved. Goals provide the “why” of the specific actions the Town will take. Typically a strategic plan has four to six goals.

Strategies to achieve each of the goals are established. Strategies are the means to achieve multi-year goals. They are measurable, with specific resources assigned, timeframes allocated, and responsibilities determined. As a general rule, between two and four strategies are typically established for each goal.

Success indicators that identify how the Bladensburg Council, staff, residents and community stakeholders will be key to evaluating successful achievement of the goals.

Implementation Action Plan to ensure accountability for accomplishing the goals and strategies. The action plan includes key tasks, timetables, lead staff, and resources required to carry out the strategies.

Reporting progress and updating the plan on a scheduled basis is necessary to ensure that progress is made, that budgets are tied to the plan and that the Town measures its results on the basis of the plan and at regular intervals. The plan should be reviewed annually, with adjustments made to reflect changing conditions and accomplishments.

Work Plan and Activities

Based on our experience with strategic planning and our understanding of the needs of Bladensburg as outlined in the RFP, we have prepared a detailed plan of work. This framework is amenable to refinement to adapt it to your specific interests.

Activity 1: Start Project

Management Partners will begin the project by meeting with the Town Administrator (and others, as designated) to finalize the work plan, schedule of meetings, and to discuss our respective roles and the type of support that will be provided by Bladensburg staff during the project. The kickoff meeting is a time to establish a relationship between our associates and the Town and confirm communication protocols. Management Partners will submit a preliminary information request identifying the documents and information that will be useful to us in assessing the organizational operations of the Town and benchmark operations with comparable local governments.

We are sensitive to the impact requests for information and data can have on Town staff. Whenever possible, we will request existing documents and not ask for data that must be created. Information we are likely to seek for our analysis includes:

- Working papers and presentations used in the creation of the current strategic plan,
- Demographic data and projections,
- Land use plans and land use projections,
- Current department and program level performance metrics,
- Customer satisfaction data, and
- Annual operating and capital budgets for this fiscal year, with any projections for future years.

Activity 2: Complete Interviews and Benchmark Services and Operations

Next we will conduct individual interviews with the Mayor, members of Council, the Town Administrator, department directors and other members of the Strategic Planning Team. The purpose of these interviews is to understand individual perspectives about a vision for the Town, the current mission statement, goals, and action steps, future challenges, opportunities,

constraints, and other issues that may impact strategic planning and implementation efforts. Additionally, the interviews will identify thoughts and opinions pertaining to strengths, weaknesses, opportunities and threats (SWOT) when considering Bladensburg's future.

The results of the interviews and SWOT analysis will be documented and evaluated for major themes. This analysis will be shared with the Strategic Planning Committee to determine if additional information or supporting data are needed to clarify any of the resulting themes or issues.

During this activity, Management Partners will work with the Town Administrator to identify criteria for choosing comparable local governments to survey for the collection of benchmark data. Management Partners will complete a comparative analysis of operations and services performed by Bladensburg and the peer respondents. The benchmark analysis of services and operations will complement and further inform the interview data, and SWOT analysis themes.

The last task of Activity 2 will involve assisting Bladensburg staff with the preparation of an environmental scan. The environmental scan will identify significant changes to the external or internal environment that will likely influence the accomplishment of future goals and action steps.

We will provide examples from previous engagements and work closely with Town staff in the preparation of the environmental scan elements. Data sets that are typically included in an environmental scan are:

- Financial forecast for the Town,
- Economic indicators,
- Stakeholder needs,
- Local demographic trends,
- Housing trends,
- Legislative mandates,
- Regional issues, and
- Other issues (e.g., environmental, infrastructure, service demands).

Activity 3: Develop a Service Preference Ranking

During this activity Management Partners will use information obtained from departments about services to inform meetings of community focus groups. The focus group participants will be asked to assess and rank Town services. The resulting Service Preference Ranking will become a part of the Strategic Planning Workshop briefing packet, along with information and data gathered during activities 1 and 2.

Activity 4: Conduct Strategic Planning Workshop

Management Partners will work collaboratively with the Town Administrator to develop the workshop agenda, identify an appropriate meeting location and confirm key meeting logistics. Because of our experience with strategic planning, Council facilitation and our understanding of local government, we will design the session so it is interactive and engaging. It will be focused on deliberation and engagement that is inclusive so issues can be explored and decisions can be made.

During the workshop Management Partners will facilitate discussion and decision-making processes with members of the Committee. The agenda may include some or all of the following components:

- Review and discuss environmental scan issues and opportunities,
- Review and discuss SWOT analysis
- Review and discuss the Service Preference Ranking by residents and stakeholders,
- Develop a Bladensburg vision and revisit the mission statement,
- Identify goals,
- Identify action steps for the goals,
- Determine success indicators for each goal, and
- Determine reporting and accountability mechanisms.

Activity 5: Prepare the Strategic Plan

Following the workshop Management Partners will prepare a draft strategic Plan. The strategic plan, at a minimum, will contain the following components:

- Vision and mission,
- Multi-year goals,
- Objectives for each goal,
- Success indicators for each goal, and
- Reporting and accountability mechanisms.

We will review the draft plan with the Strategic Planning Committee and make modifications based on their input. We will then finalize the plan document to the satisfaction of the Strategic Planning Committee, by incorporating comments from Committee members and Town leadership. Once the strategic plan document is prepared, we will work with the Town Administrator and directors to develop the Implementation Action Plan during Activity 6.

Activity 6: Assist with Implementation

For implementation to occur in an orderly and effective manner, it is important to identify and define the following elements:

- Key tasks;
- Timelines (start and completion dates);
- Resources needed and currently available (and sources);
- Staff assigned (including a lead person); and
- Success measures.

Management Partners will prepare a draft Implementation Action Plan detailing the items listed above. We will review it with staff to ensure it contains all of the information needed and is accurate. Once we have received feedback, we will finalize it. The Implementation Plan will then become a part of the Strategic Plan document, and the blueprint that directs future work planning and resource allocation.

Management Partners will present the completed strategic plan to the Mayor and Council for consideration at a special meeting.

FEES AND HOURS

Management Partners anticipates devoting 131 hours of our staff time to execute the plan of work described above. The ultimate test of a quality project is that the client is pleased with the results, and we are committed to achieving that goal. The total cost of this project is \$20,990

which includes all fees and expenses. A breakdown of the project cost, by activity and hours is included in the table below.

Activity	Hours	Fee
1: Start Project	4	\$ 2,180
2: Review and Benchmark Services and Operations	52	\$ 7,080
3: Develop Service Preference Ranking	15	\$ 1,855
4: Conduct Strategic Planning Workshop	37	\$ 6,125
5: Prepare the Strategic Plan	15	\$ 1,965
6. Assist with Implementation	8	\$ 1,785
Total	131	\$20,990

ABOUT MANAGEMENT PARTNERS

Management Partners was founded in 1994 with a specific mission to help local government leaders improve their service to the public. We are a national consulting firm headquartered in Cincinnati, Ohio, with offices in Altamonte Springs, Florida; and San Jose and Costa Mesa, California. We have a well-established track record of helping public sector organizations throughout the United States, including all of the services provided by cities, counties, towns, and special districts at the local level.

During our 20 years of service, we have earned a national reputation by delivering quality, actionable work products to our clients. We bring extensive experience to this project, along with first-hand knowledge of local government operations. We are distinguished by the fact that each team we assign is led and staffed by associates who have actual experience in direct public service and experience working together as a team. The work we do is not an academic exercise; it is grounded in the real world of customer service and accomplishment in the public sector. As a result, we have a bias for producing value-added work for each client that will be actionable, and will be implemented.

The firm is staffed with 80 professionals who are experienced public service managers as well as qualified management consultants. This group includes generalists as well as subject-matter experts. Our consultants have years of experience working in all aspects of local government management and have built a track record of extraordinary quality service for our clients.

The firm has extensive experience helping improve both the efficiency and effectiveness of local government services. We have completed organizational staffing and improvement projects in virtually every type of local government service, including reviews of entire governments as well as selected studies of individual departments and functional activities.

Management Partners' services include everything required to support local government leaders, elected or appointed. We are also experienced in executive management facilitation, having facilitated numerous council/board and management team workshops and meetings. We have designed and led many civic engagement projects of a broader nature as well, often in conjunction with broadly inclusive strategic planning projects. We are specialists in performance management and led the creation of the International City/County Management Association's (ICMA) Center for Performance Measurement. In addition, we have supported many local governments (cities, counties and towns) in the design and implementation of jurisdiction-specific performance management programs. Staff development and training is always a

priority, especially in the area of performance measurement, where we have trained well over 100 jurisdictions throughout North America.

The range of our services is presented in the following list:

- Strategic and Business Planning – To set the direction for the enterprise and to prepare the business plans required to continuously improve service delivery.
- Organizational Analysis and Performance Audits – To identify improvements to an operation's efficiency and effectiveness, also called efficiency studies or organizational reviews.
- Financial Planning, Budgeting and Analysis – To manage the financial affairs of the enterprise, multi-year financial planning, a well-structured, transparent budgeting process supported by thorough analysis.
- Performance Management – To systematically track the performance of the enterprise, including performance management and measurement, process management, performance budgeting, employee performance evaluation and strategic and process benchmarking.
- Process Improvement – To critically examine specific business processes by which customers are served (internal or external), to precise the opportunities for improvement, including process mapping.
- Organizational Development and Training – To help clients develop organizational capacity, a key to high performance organizations. Services include executive coaching, customer service training, employee and customer surveys and conflict management workshops.
- Sharing and Consolidation of Services – To improve the cost-effectiveness of service delivery. There are usually opportunities to partner with other units of government to combine service delivery through sharing or consolidation. Options range from the complete integration of previously separate jurisdictions to sharing or consolidating the management of individually delivered services and operations.

We are experienced in executive management facilitation, having facilitated numerous council/board and management team workshops and meetings. We have also designed and led civic engagement sessions of a broader nature, often in conjunction with strategic planning projects.

Financial and business planning is an important part of our work and helping local governments address the effects of the recent recession has been an area of major emphasis. Working with cooperating local governments to identify and implement shared service delivery has also been an area of particular competence, especially in the current economic environment.

We offer a balance of perspectives with a practitioner's bias and a proven track record of successful consulting engagements. This experience gives us a sensitivity that produces positive outcomes. Each of our projects is individually tailored to the unique needs of the client. We have a deep understanding of the service environment of local government and we are proud to say that as a result of our quality work, many of our clients ask us to complete subsequent assignments.

PROJECT TEAM

Our team has expertise in working with governing bodies in the formulation of successful strategic plans and processes and not simply a firm or individual skilled in facilitating discussion. Management Partners has a strong project team that is well-qualified to assist the Town of Bladensburg with strategic planning service. Each of the assigned consultants has extensive experience working with Town Councils, Planning Committees, and municipal leadership teams in retreat settings to collaboratively develop vision, mission, goals and strategies. Additionally, our facilitators are highly skilled in helping resident and stakeholder groups reach consensus through the use of multiple facilitation and group process methods.

This project will be a top priority for Management Partners and our team members will be available in whatever capacity and with whatever availability will contribute to the success of the project. The project team will work out of our Cincinnati, Ohio office.

Kevin Knutson will serve as project director and will oversee the substantive work of the project. Jacquelyn McCray will serve as lead facilitator and project manager, and will be responsible for execution of the project. They will be supported by Sam Lieberman.

The qualifications of each team member are briefly summarized below. Complete resumes for each person are included in Attachment A to this response.

Kevin Knutson, Regional Vice President

Kevin Knutson is Regional Vice President for Management Partners' eastern office in Cincinnati, Ohio. Kevin has more than 20 years of experience in local government, including ten years in strategic planning, budget, performance measurement, and process improvement and six years in community relations, communications, and citizen engagement. He is recognized as a national expert in local government performance management, long-term financial planning, and communications. He was part of a team that implemented quality management practices in Coral Springs that led to the City being the first local government to earn the Malcolm Baldrige National Quality Award. Kevin served as interim city manager, assistant city manager, director of the office of management and budget, and director of community relations in Reno, Nevada; and as director of communications and marketing and budget and strategic planning manager for Coral Springs, Florida. He has earned the designation of Credentialed Manager from ICMA and was named the City-County Communications and Marketing Association's 2011 Communicator of the Year.

Jacquelyn McCray, Ph.D., Senior Manager

Jacquelyn McCray is a Senior Manager with extensive local government consulting experience. She is a professional planner and a certified economic development professional. She has extensive experience assisting local governments with strategic planning, reforming and improving development review processes, organizational and workflow analyses, performance measurement, succession planning and strategic benchmarking and analysis. Most recently Jacquelyn worked with the city councils and administrators of Margate, Florida and Morgantown, West Virginia to complete strategic plan and priority setting documents to guide work planning and resource allocation. She has excellent interview and facilitation skills, and she frequently conducts employee and stakeholder focus group meetings, strategic planning sessions. Before joining Management Partners, Jacquelyn held positions as a budget analyst,

project manager and land-use manager with the City of Cincinnati. She served as vice chairperson and member of the Cincinnati City Planning Commission for nine years. Jacquelyn is a member of the American Institute of Certified Planners (AICP).

Sam Lieberman, Management Advisor

Sam Lieberman is responsible for conducting complex financial and operational analysis to support many different types of clients including organization reviews, process improvement studies, service sharing projects, and financial planning and budgeting studies. He has helped facilitate strategic planning and process improvement workshops, developed and analyzed strategic planning community input surveys, conducted research and analyses, assisted in the development of performance measurement systems, and directed benchmarking research. He also collects, analyzes, and reports data for the annual Southwest Ohio Fire Benchmarking Project. Recent clients whom he has served include Berkeley, Carson, San Bernardino, Orange County, Santa Clara Valley Water District, and Zone 7 Water Agency in California; Hartford, Mansfield, and New Haven, Connecticut; Kenton County and Florence, Kentucky; Kansas City, Missouri; DeKalb County, Georgia; Pinellas County and Largo, Florida; Phoenix, Arizona; and Hamilton County, Fairfield, Mason, Montgomery, and Westerville, Ohio.

Schedule

A proposed project schedule is included in Attachment B. We expect to refine this schedule with you during the project start-up (Activity 1) as discussed previously. We are available to begin the project within two weeks of the award date and propose a schedule of work that would deliver the draft strategic plan to the Planning Committee for review by the first week in May 2015 and a completed strategic plan with implementation action plan prepared for consideration by the Bladensburg Council by the first week of June 2015.

REFERENCES

Management Partners specializes in providing quality professional consulting assistance to local government clients. Our website, www.managementpartners.com contains information about our clients, and you are welcome to contact any of them about the quality of our work. We believe our track record of completing similar projects on time and on budget, with quality deliverables specifically designed to be implemented, make Management Partners well qualified to execute this work for the Town of Bladensburg.

We have worked recently with the three references below. They can attest to the professionalism of our staff and the thoroughness of our approach to strategic planning.

Margate, Florida

Management Partners' assisted the Mayor, City Commissioners and City Manager with the development of five-year Strategic Plan. The purpose of the plan was to guide and focus the allocation of resources to ensure that important projects and milestones are completed within a designated timeframe. An inclusive process of interviews, focus groups and surveys, supplemented by an assessment of current and future environmental conditions impacting the future of the City, was used to inform City leaders about trends and projections. A day-long strategic plan workshop with City Commissioners and the City's management team produced six strategic goals and priorities addressing city image and identity, community service and outreach, economic development, financial management, infrastructure and public facilities, and

quality of life. The priorities were further supported by an Implementation Action Plan to assist with timely execution and performance management.

Client Contact: Mr. Douglas Smith, City Manager
5790 Margate Boulevard
Margate, FL 33063
(954) 935-5300

Morgantown, West Virginia

Management Partners conducted a four-hour priority setting session with the members of city council, city manager, and deputy city manager. The strategic priorities setting session assisted city council members in the identification of a Morgantown vision and mission statements and five priority issue areas to guide the work of the administration and city staff for the fiscal year. During the session, Management Partners facilitated identification goals, strategies and success factors for each priority area.

Client Contact: Mr. Jeff Mikorski, City Manager
City Hall, Third Floor
389 Spruce Street
Morgantown, WV 26505
(304) 284-7404

Wichita, Kansas

Management Partners facilitated a strategic planning project with the City of Wichita to develop short- and mid-term goals. Individual interviews were conducted with the Mayor, Council members and City Manager. In addition, department directors completed a survey about issues to be considered during the planning process. The results were reported in a white paper that was distributed to Council members in preparation for a workshop. Interview and survey results were used to develop a list of issues and potential goals for discussion. The first of two workshops was to identify goals and strategies. The second, several months later, was scheduled to examine how the goals aligned with the results of a large civic engagement activity undertaken by Wichita State. In addition to articulating and prioritizing goals, the workshop outcomes included discussing success factors so that Council members were in agreement about expectations and staff had a clear idea of actions to be taken.

Client Contact: Mr. Robert Layton, City Manager
City Hall
455 North Main
Wichita, KS 67202-1667
(316) 268-4351

We have assisted a wide range of organizations with strategic planning, as illustrated by the following list of clients from the past five years.

- Alameda County City Managers Association, CA Strategic Visioning
- American Canyon, CA Long Term Strategic Plan
- Beverly Hills, CA Strategic Policy Retreat
- Chrysalis Enterprise, Los Angeles, CA Strategic Planning Workshop
- Rio Rancho, NM Strategic Plan
- Riverside County, CA Fire Department Strategic Plan
- Rohnert Park, CA Strategic Plan
- Sacramento Area Council of Governments, Sacramento, CA Strategic Plan

- Clayton, OH Goal Setting and Visioning
- Mansfield Downtown Partnership, CT Strategic Plan
- Margate, FL Strategic Plan
- Montgomery, OH Strategic Plan
- Morgantown, WV City Council Goals and Priorities
- Orange County, CA Cemetery District Strategic Plan
- Pacific Library Partnership, San Mateo, CA Strategic Plan
- Palo Alto, CA, City of Palo Alto Utilities Strategic Visioning
- Petaluma, CA Strategic Plan and Goal Setting
- San Joaquin Valley, CA Library System Strategic Plan
- Santa Ana, CA Strategic and Business Planning
- Santa Barbara County Association of Governments, CA Strategic Plan
- Solano Irrigation District, Vacaville, CA Strategic Plan
- Sonoma Valley Fire and Rescue Authority, Sonoma, CA Strategic Plan
- Strategic Plan Follow up Workshop
- Tustin, CA Strategic Planning
- Ventura County, CA Strategic Planning
- Wichita, KS Strategic Planning
- Woodside, CA Strategic Alternatives Study
- Worthington, OH 360 Strategic Plan

CONCLUSION

Management Partners has the experience, the professional talent and the commitment necessary to successfully complete this strategic planning process for the Town of Bladensburg. We are committed to delivering a high level plan for the future that will assure the continuance of responsible and responsive operations and services for residents and stakeholders of the Town. We welcome the opportunity to provide additional information that may be helpful and would be pleased to assist you with this project.

ATTACHMENT A – PROJECT TEAM RESUMES

KEVIN KNUTSON

Kevin Knutson, ICMA-CM, is Regional Vice President for Management Partners' eastern office in Cincinnati, Ohio. Kevin has more than 20 years of experience in local government, including ten years in strategic planning, budget, performance measurement, and process improvement and six years in community relations, communications, and citizen engagement.

He has served as an assistant city manager for the City of Reno, Nevada, with oversight of human resources, intergovernmental affairs, economic development, and redevelopment; as well as neighborhood services, community resources, and public information. He also served as interim city manager for the City of Reno and interim executive director of the Reno Redevelopment Agency. In September 2011 he was named "Communicator of the Year" by the City-County Communications & Marketing Association (3CMA).

He previously served as the director of the office of management and budget, where he oversaw strategic planning, budgeting, performance measurement, internal audit, community resources, and public outreach. Before that, he was the director of community relations, with responsibility for the City's communications, neighborhood services, and Reno Direct. This included responsibility for media and public relations, advertising, Reno TV, the City's website and intranet, the City's call center, neighborhood services, and the community liaison program. Prior to joining Reno, Kevin served as the director of communications and marketing for the City of Coral Springs, Florida.

For seven years, he served as the budget and strategic planning manager for Coral Springs, overseeing the award-winning strategic plan, business plan, budget, capital improvement and replacement programs, performance measurement system, process improvement program, managed competition, and elements of the City's quality initiative. He was writer and editor of the City's Baldrige and Sterling applications and has served as a Sterling Examiner. The City of Coral Springs was awarded the Florida Governor's Sterling Award for Organizational Excellence in 1997 and 2003, and was the first local government to win the Malcolm Baldrige National Quality Award in 2007.

He is recognized as a national expert in local government performance management, long-term financial planning, and communications; and has been a speaker and author on long-range financial planning and performance management for the Government Finance Officers Association (GFOA), the American Productivity and Quality Center (APQC), and 3CMA.

Kevin earned master and bachelor degrees in English from Florida International University in Miami, Florida; and has attended the Center for Creative Leadership, GFOA's Advanced Government Finance Institute, and Harvard's Kennedy School of Government executive program. He was honorably discharged from the U.S. Army, after service in Germany.

JACQUELYN Y. MCCRAY, PH.D.

Jacquelyn McCray, Senior Manager, has more than 25 years of experience in local government management. Nine of those years were with the City of Cincinnati, where she was a budget analyst, project manager and land-use planner. Since joining Management Partners Jacquelyn has been a key staff member on myriad projects analyzing development review processes, performance measurement and organizational review. She is particularly adept at strategic planning, process improvement, benchmarking, performance management, training and development, and focus group facilitation.

Jacquelyn is a member of the American Planning Association and a certified economic development professional. She served as a member and vice chairperson of the Cincinnati City Planning Commission for nine years.

Jacquelyn has assisted organizations in future search, mission and vision setting, the identification of critical environmental indicators, and in crafting goals and objectives in the completion of strategic planning projects. Specifically she has assisted the following cities and organizations to develop strategic plans: City of Margate, Florida, City of Morgantown, West Virginia; the Mansfield Downtown Partnership, Mansfield, Connecticut; Montgomery, Ohio; the Louisville, Kentucky Health Department; the Town of Mansfield, Connecticut; Hamilton County, Ohio Department of Job and Family Services; Lake County, Illinois and The Advance, a Division of the General Board of Global Ministries of the United Methodist Church.

Jacquelyn has refined expertise conducting development review process analyses and improvement projects for the following clients: Saint Paul, Minnesota; Largo, Florida; the Louisville, Kentucky consolidated government; Cape Coral, Florida; Wichita, Lenexa and Olathe, Kansas; Nevada County, California; the Maryland-National Capital Park and Planning Commission; the Unified Government of Wyandotte County and Kansas City, Kansas; Lexington, Kentucky; Howard County, Maryland; North Port, Michigan; and Oklahoma City, Oklahoma;

In the area of performance measurement and management projects, Jacquelyn has assisted Westerville, Ohio; the District of Columbia; Arlington County Public Schools and Loudoun County, Virginia; the Louisville, Kentucky consolidated government; the Unified Government of Wyandotte County, Kansas; and King County, Washington. She has also conducted performance measurement training for many jurisdictions.

Jacquelyn has completed human resources benchmarking analyses for Sedgwick County, Kansas; and Loudoun County, Virginia; and she assisted with benchmarking and compensation analyses for the cities of Oakland and Santa Clara, California. She also worked with the City of Covington, Kentucky to develop a long-range financial plan.

Jacquelyn has completed organization development and improvement reviews, position analyses and service consolidation assessments for agencies across the country. Among them are Blue Ash, Montgomery and Sycamore Community Schools in Ohio; Chesapeake, Hampton and Richmond, Virginia; Berks County, Pennsylvania; Kansas City, Kansas; the Nashville (Tennessee) Airport Authority; Kenton County and the consolidated governments of Louisville and Lexington Kentucky; the City of Fort Wayne and Allen County, Indiana and Lancaster, Muhlenberg, Harrisburg and Reading, Pennsylvania.

Jacquelyn recently completed her doctoral studies at Antioch University in Leadership and Change. She also holds a bachelor's degree in urban planning and a master's degree in public administration from the University of Cincinnati.

SAMUEL J. LIEBERMAN

Sam Lieberman, Management Advisor, joined Management Partners in April 2010. Since then he has conducted complex financial and operational analyses to support a variety of assignments including organization and process improvement studies, and service sharing, financial planning, and budgeting projects. He has helped facilitate strategic planning and process improvement workshops, conducted research and analysis on staffing studies, assisted in the developing performance measurement systems, and directed benchmarking research.

During his tenure at Management Partners, Sam has assisted with the development of performance measures in Fairfield and Westerville, Ohio and manages the annual Ohio Fire Benchmarking Project. He has participated in numerous fire and police organizational assessments, most recently for Florence, Kentucky and Chatham County, Georgia. He has facilitated strategic planning efforts in Montgomery, Ohio, and Morgantown, West Virginia and has developed and analyzed strategic planning community surveys, most recently for the cities of Margate, Florida and Santa Ana, California. He has analyzed budgets and staffing for several jurisdictions and assisted with a fleet management study.

Sam has most recently helped Saint Paul, Minnesota and Aurora, Colorado improve their development review processes. Other clients he has served include the cities of Berkeley, Carson and San Bernardino, Orange County, Santa Clara Valley Water District and Zone 7 Water Agency in California; Hartford, Mansfield, and New Haven, Connecticut; Kenton County and Florence, Kentucky; Kansas City, Missouri; DeKalb County, GA; Pinellas County and Largo, FL; Phoenix, Arizona; and Hamilton County, Fairfield, Mason, Montgomery and Westerville, Ohio.

Sam gained valuable experience in the day-to-day functioning of local government during an internship with the City of Cincinnati while completing his undergraduate work. He researched the feasibility of implementing a streetcar system in Cincinnati and prepared staff reports on the subject. He also assisted with the process of rolling out and implementing CincyCare, a public/private health care partnership. As he was concluding his political science degree, Sam authored a scholarly article that assessed the accuracy of pre-primary polling in the 2008 Democratic Presidential Primary. That paper was presented during a conference of the Midwest Association for Public Opinion Research in September 2008. Sam graduated from the University of Cincinnati in 2008 with honors degrees in sociology and political science.

Prior to joining Management Partners, Sam worked in local politics. He managed a Cincinnati City Council campaign and then served as deputy finance director for a Congressional campaign.

ATTACHMENT B – PROPOSED PROJECT SCHEDULE

Strategic Planning Services Town of Baldensburg		Start	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21
Activity 1: Start Project and Assit with Development of an Environmental Scan		1/5	1/12	1/19	1/26	2/2	2/9	2/16	2/23	3/2	3/9	3/16	3/23	3/30	4/6	4/13	4/20	4/27	5/4	5/11	5/18	5/25
1.1	Meet with Town Administrator and Steering Committee to review analysis tools and confirm work plan																					
1.2	Request background materials and data																					
1.3	Discuss the environmental scan and provide samples																					
Activity 2: Review and Benchmark Services and Operations		1/5	1/12	1/19	1/26	2/2	2/9	2/16	2/23	3/2	3/9	3/16	3/23	3/30	4/6	4/13	4/20	4/27	5/4	5/11	5/18	5/25
2.1	Conduct interviews with Mayor and Council members																					
2.2	Interview Administrator and department directors																					
2.3	Benchmark service delivery in comparable communities																					
2.4	Review current operations																					
2.5	Prepare summary of operations and benchmark analysis																					
2.6	Document results of interviews and high level SWOT																					
Activity 3: Develop Service Preference Ranking		1/5	1/12	1/19	1/26	2/2	2/9	2/16	2/23	3/2	3/9	3/16	3/23	3/30	4/6	4/13	4/20	4/27	5/4	5/11	5/18	5/25
3.1	Convvene community focus group																					
3.2	Tabulate service preference rankings																					
3.3	Document results and distribute to Planning Committee																					
Activity 4: Conduct Strategic Planning Workshop		1/5	1/12	1/19	1/26	2/2	2/9	2/16	2/23	3/2	3/9	3/16	3/23	3/30	4/6	4/13	4/20	4/27	5/4	5/11	5/18	5/25
4.1	Prepare draft agenda and briefing documents																					
4.2	Review with Town Administrator																					
4.3	Conduct Strategic Plan Workshop																					
4.4	Document Workshop results																					
Activity 5: Prepare the Strategic Plan		1/5	1/12	1/19	1/26	2/2	2/9	2/16	2/23	3/2	3/9	3/16	3/23	3/30	4/6	4/13	4/20	4/27	5/4	5/11	5/18	5/25
5.1	Draft strategic plan mission, vision, goals and strategies																					
5.2	Review draft strategic plan with the Planning Committee																					
5.3	Incorporate feedback and prepare final document																					
Activity 6: Assist with Implementation		1/5	1/12	1/19	1/26	2/2	2/9	2/16	2/23	3/2	3/9	3/16	3/23	3/30	4/6	4/13	4/20	4/27	5/4	5/11	5/18	5/25
6.1	Prepare draft Implemenation Action Plan																					
6.2	Meet with Administrator and directors to finalize implementation plan																					
6.3	Present Strategic Plan recommendations to the Mayor and Council																					