

SBRAND SOLUTIONS

PROPOSAL FOR THE CITY OF SANDY

ECONOMIC DEVELOPMENT SERVICES



Strategic. Sustainable. Success.

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{SBrand}
HELPING YOU FILL IN THE BLANKS



March 10, 2022

David Snider
Economic Development Manager
City of Snider
39250 Pioneer Blvd
Sandy, OR 97055

Response to RFP – 15-year Economic Development Strategic Plan

Dear Mr. Snider:

SBrand Solutions is pleased to present our qualifications to be the strategic planning and facilitation partner for the City of Sandy. SBrand is uniquely qualified for this project based on our experience, background, expertise, and passion. We are professional facilitators based in Texas, Colorado, Florida, and Washington, with an extensive background in economic development, specializing in strategic planning and facilitated meetings with a deliberate focus on local government organizations. The team associated with this project has vast experience working with a wide variety of clients, including diverse communities and governmental agencies across the country.

We understand that you are seeking a consultant to partner with and guide in the design of an 15 Year Economic Development Strategic Plan that deliberately and methodically guides the Sandy community in its next phase of economic growth. Someone to work with the community to assess the current direction coordinate collaborative decision making, help in data collection, facilitate stakeholder engagement, create mission, vision, and value statements; and form strategies around areas such as future development targets. This also include extensive cooperation with other consultants as the Comprehensive Plan and Economic Opportunities Analysis is developed.

The result would be a long-range economic development strategic plan that address specific programs and contains an actionable implementation plan. We will use a proven methodology that is customized to Sandy, and our approach as your strategic partner will result in a collaborative and creative strategic framework, with data driven measurements and specific implementation strategies.

During this unusual time of ongoing public health concerns, we also wanted to highlight our expertise in virtual facilitation – I am a Certified Virtual Facilitator™ (as is everyone on our staff) and we have facilitated virtual meetings from small team groups to large community meetings with over 100 participants. I am also certified by Cornell University in Diversity and Inclusion and bring that background and approach to our work. I recently wrote an article on community engagement for the International City/County Managers Association which can be found here: <https://icma.org/articles/pm-magazine/how-facilitate-inclusive-community-outreach-and-engagement>



I am the owner of SBrand Solutions and will be the primary point of contact for clarifications and negotiations and have the authority to clarify and negotiation any and all aspects of the proposal. I will personally oversee the process: with over 28 years of strategic planning management for local governments (as both an employee and a consultant), I have a unique skill set that will guide your team to great results. As one of fewer than forty Certified Master Facilitators™ in the world, my team and I will utilize our expert skills in strategic planning and goal setting facilitation to guide the creation of the framework for the future.

While we work across the country with a wide range of clients, our local government work includes creating economic development strategic plans for cities and counties, creating strategic plans and Business Expansion Attraction and Retention (BEAR) programs for various cities, and consulting in areas of economic development. The two facilitators for this project have spent a combined 40 years working in the land use and economic development fields including extensive experience both working directly for communities of similar size, as well as helping economic development organization plan for the future.

If you need more information, we would be happy to meet with you and share more details at your convenience. Thank you for your consideration of our proposal. I look forward to hearing from you - we are very excited about the prospect of working with you and your team!

Sheryl Trent

Owner, Certified Virtual Facilitator™ and Certified Master Facilitator™



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{Experience: Why SBrand Solutions?}

Established in January of 2011 by Sheryl Trent, SBrand Solutions is a woman-owned firm with unique expertise in working with local government clients to solve problems and “fill in the blanks”. We will partner with your team through solutions and implementation. We have five areas of expertise:

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

What makes us different:

Background in Local Government: We have a unique perspective on creating strategic plans, and an innovative (and proven) method of engagement that drives outcomes. Driven by our expert professional facilitation, the information and feedback we gather will create a strategy for the future of the organization that is based on the foundation of past successes and lessons learned.

A Lens of Equity and Inclusion: We always use a strategic framework and proven methodology that not just encourages but requires diversity, equity, and inclusivity to get the best result. Our **philosophy** is that “none of us is as smart as all of us” and that lens is applied to all facets of our approach.

Professional Facilitation Certifications: We know how to ask the right questions, framed in the right way, with the right people in the room (the R3 principle).

Diverse Range of Expertise: The SBrand team is a diverse group of professionals with expertise in a wide range of areas including government finance, economic development, community development, parks and recreation, public works, community safety, civic engagement, team assessments, board training, and much more. We limit our clients to provide the exceptional service that is our hallmark and can customize our results and interaction to meet each client’s specific needs.

Long Term Relationships: We have long term relationships with our clients – over 50% of our ongoing business is with former clients, and another 25% comes from referrals from those clients. You can read more about our [Guiding Principles](#) for our approach.

Customized and Collaborative Approach: We believe in meeting our clients where they are, offering advice and ideas, giving guidance and strong recommendations when needed, and ensuring ongoing sustainability through templates and support.

Similar Projects and Work

We have attached the required references as well as a list of representative projects and wanted to create a short list of clients for your review. In the past three years, we have completed strategic plans and/or organizational assessments for:

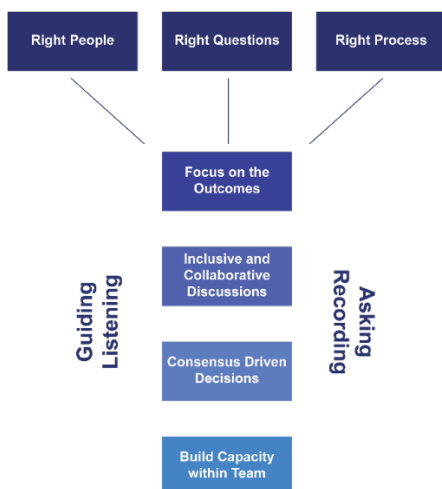
- States, Cities, and Counties across the United States
- Federal Government Agencies
- Non-profits (Community Foundations, Partnerships, Museums, Educational, Human Rights)
- Quasi-Governmental Organizations and Special Districts
- Public Works, Human Services, Housing and Human Resources Departments
- Economic Development Organizations and Main Streets

We believe there are three key inputs to our methodology: **the people, the preparation, and the product.** We use a lens of inclusion and diversity in our engagement process – inclusion meaning welcoming and the ability to adapt to meet the needs of the participants, and diversity meaning representative of as many aspects of the community as we can possibly gather.

People

Our preference is to incorporate as many people into the process as possible, through the approach of multiple facilitated meetings, focus groups, personal interviews of key stakeholders, phone interviews, and short surveys among other methods. The City Council and leadership staff will be integral to the success of the project, but there may be others whose input would be helpful to include.

APPROACH TO FACILITATION



Preparation

Preparation for the conversations and the facilitated meetings is the second most critical factor. (We often spend 5 hours researching, creating engaging exercises, and planning for every 1 hour in a meeting.) Using the feedback received during the kickoff meetings and conversations as well as the review and research of documentation, we will recommend questions to guide the personal interviews and surveys. This personalized approach results in specific questions tailored to you and your team and creates the foundation for the outcomes.

Facilitating meetings is both an art and science. As a Certified Master Facilitator™, Sheryl is a recognized expert in creating a facilitated meeting that accomplishes:

- ✓ **Full, comfortable, and enthusiastic input and engagement from all participants.**



- ✓ **Relationship building, clear communication, and shared understanding.**
- ✓ **Support for the ideas and buy in for the implementation of the plan.**
- ✓ **The outcomes and products (relationships and deliverables) that your team wants and needs.**

Product

We understand that the final product is a long-range vision driven Economic Development strategic plan with a data focused implementation matrix. These documents will build on the work completed in the past, be informed by current circumstances, and look to the future. The plan will serve as a roadmap moving forward based on both policy direction from the City Council as well as operational needs of the organization.

You can view some examples of the plans we create on our website at www.sbrandsolutions.com. There you will see that they all reflect the unique culture of each client; are clear, understandable, and easy to read; and used as a communication tool, not just a detailed document. We also understand and have experienced firsthand that a well-designed process can create many other “products” or outcomes. Our methodology is designed to produce outcomes that result in:

- ✓ **Teamwork**
- ✓ **Trust and respect**
- ✓ **Understanding of the needs and long-term challenges**
- ✓ **Buy in and support of the Vision for the future**
- ✓ **Champions for the action moving forward**

The people and the facilitation process build the foundation that will lead to the **successful outcome**: long-term sustainability for the City of Sandy. We know you are the experts for your city, and that collective knowledge and expertise will allow us (as the experts in facilitation and strategic planning) to partner and create exactly what you need.

About Virtual Meetings

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

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

{Staffing Plan: Experience and Expertise}

Zach Ratkai | Project Manager – Lead Facilitator

Zach has served in Economic Development roles for communities in Colorado and Washington State. He is a government collaborator and champion of the public sector with over 18 years of experience. His passions are government administration and economic development, with vast experience in working to tie together community needs with economic growth. He works with communities, businesses, and non-profits to create functional and collaborative cultures to serve their missions.



A graduate of the University of Colorado’s School of Public Affairs, Zach holds a master’s degree in Public Administration and a Certificate in Public Management. He also holds a bachelor’s degree in Applied Geography from the University of Northern Colorado. Zach’s local government work experience includes government administration, economic development, urban and regional planning, and disaster recovery management and resiliency building. He is a Certified Virtual Facilitator and has facilitated strategic plans for local government, non-profit, and Federal agencies with clients spanning from North Carolina to Alaska.



Sheryl Trent | Owner – Secondary Facilitator

Sheryl will serve as a second facilitator for the project and assist where needed. Sheryl has served as the Economic Development Director for two major communities in Colorado, and as the Urban Renewal Authority Executive Director. She has administered CDBG programs, served as staff and Board member to/on various private and public nonprofit organizations, and consulted to various private and public partnerships in public service.

In addition to her 28 years of local government experience, she is one of fewer than 45 Certified Master Facilitators™ in the world and is also a Certified Virtual Facilitator™. She also holds a certification from Cornell University in Diversity, Equity, and Inclusion. Her real-life experience includes managing strategic plans, comprehensive plans, multimillion-dollar capital projects, economic development agencies, and Urban Renewal Authorities. Combining her nonprofit board service and her local government experience gives her a unique understanding of the needs of her clients.

She designed SBrand Solutions to “help fill in the blanks” for her clients: local governments, special districts, nonprofits, and other agencies. She and her team of experts travel across the country guiding a customized process grounded in proven methodologies to create strategic, sustainable success. Sheryl is also recognized by her work with elected boards in the areas of team building, board development, and board

training. She is a preferred consultant in these areas for the State of Colorado and has worked with hundreds of clients in board retreats.

She serves on the board of the International Institute for Facilitation, the world's leading institution for facilitation research and innovative learning. She is a member of the Association for Strategic Planning, the National Center for Deliberative Debate, the Colorado Municipal League, the Colorado City/County Manager's Association, and is also a regular speaker and contributor to various platforms on facilitation and inclusion.

Shelby Robinson | Community Outreach and Engagement

Shelby holds two degrees from Texas Christian University and is our community outreach and engagement expert. She has provided communications strategies for nonprofit clients, local government clients, and elected officials at the federal level. She is experienced in crafting social media messaging campaigns, creating community events that are welcoming and inclusive, and handouts and information that are engaging and easy to read. She has been working with SBrand Solutions for three years.



Anthony Ruiz | Administrative Assistance

Anthony Ruiz is a Certified Virtual Facilitator™ and administrative assistant with over four years of administrative, customer service, and financial statements experience. His philosophy is to return your work at the highest quality while enjoying the process. He is an Honors Graduate from the University of California-Sacramento and an avid Disney fanatic! Anthony will be providing additional administrative support on virtual meetings and backup on all social media aspects of the project. Anthony has been working with SBrand Solutions for three years.



Kristine Hutchinson

Kristine is the Development and Quality Manager for SBrand Solutions and is located in Eaton, CO. She has over 10 years of administrative experience, as well as an extensive customer service background. She holds a degree in Business Management from Johnson and Wales University Denver and is also a United States Navy veteran.

As noted, we work in regular communication with our clients (a bi-weekly update meeting during the life of the project as needed, with regular meetings suggested over time). Some of our work requires extreme confidentiality and we honor that with explicitly understood guidelines. What becomes important in this process is the opportunity to share those ideas fully, and we accomplish that by creating themes or common ideas which can then be discussed by the full group.

{Functional Approach}

Executive Summary

The SBrand team has reviewed your request for proposals understand that the upcoming Economic Development Strategic Plan is comprehensive and geared to setting the stage for Sandy’s future. Created collaboratively with the City of Sandy Economic Development Advisory Board (EDAB), Economic Development Staff and the technical advisory group, this will be a is a plan that encompasses the entire community to position Sandy on a path toward a resilient, sustainable, and vibrant economy. The Economic Development Strategic Plan will have a foundation built on analysis of established goals, policies, and plans, as well as a robust and inclusive stakeholder input and feedback process, resulting in a comprehensive plan that addresses the economic future of Sandy.

At SBrand, we have a unique perspective to creating your strategic plan, a deep understanding of needs assessments and an innovative (and proven) method of engagement. Coupled with our expertise in facilitation, we bring an expert level of skill to our work. Our work is not created by us, sitting in our offices in a vacuum – we work





in a collaborative partnership with you, your economic and business partners, community members, City Council, and City staff.

Approach to Scope of Service

In short, here is our methodology: **through a customized facilitated process, we engage with stakeholders that have diverse backgrounds, unique perspectives, cultural differences, and divergent views of the future to create alignment using shared values and consensus on the vision for the future.** That input drives the development of an actionable, realistic strategic plan that has measurable outcomes. Our recommended methodology, based upon the task area identified in your RFP, includes a kickoff launch and **four main phases:**

- **Phase 1: Project Initiation and Initial Outreach:** Launch the project with staff, based on collaboratively designing a customized process and timeframe. Understanding that the City will render all ultimate decisions on the process and plan, SBrand will help guide in the formation of engagement strategies for internal staff engagement, outreach to stakeholders, and other desired areas/levels of input and outreach. This includes development and scheduling of two (2) community vision session and several stakeholder group engagements, as well as usage of virtual engagement tools for outreach and involvement. We will also begin the review and analyzation of existing demographic, economic, and labor force data in addition to relevant Sandy and Clackamas County master plans including the Pleasant Street Master Plan.
- **Phase 2: Stakeholder Engagement and Data Gathering:** After establishing an engagement plan with staff, SBrand will facilitate two community visioning sessions and up to 5 stakeholder group engagements. As facilitators certified in virtual and in-person facilitations, we recommend both in-person and virtual options to capture the broadest spectrum of community input. Sbrand is well-trained and known for engaging, fun, and productive facilitations for either option. This phase will culminate in the documentation of findings and recommendations gained from all community engagement. SBrand also offers a wide array of electronic and online engagement means by which the community can also provide input.
Optional Engagement Opportunities:
- **Phase 3: Strategic Plan Development and Retreat:** Using the findings and recommendations from the community engagement, SWOT analysis, historical document research, and review and analysis of demographic, economic, and labor force data, SBrand will facilitate a strategic planning session and implementation meeting (we recommend a two-day retreat meeting with the staff and others as determined by you). Based on the findings of Phase 2, the retreat will result in a Mission, Vision, and Values Statement, along with suggestions of potential solutions to various economic development challenges that Sandy faces. The final Plan will propose



activities, projects, and programs to aid in the implementation of the goals and mission of the plan, with a particular focus on:

- Targeted sectors for future development
- Business attraction and retention
- Employment Land opportunities to attract additional living wage jobs.

During this phase, SBrand will facilitate a SWOT analysis with particular attention paid to the Industrial Way and Freightway Lane industrial areas to determine feasibility of continued development. Additionally, the SWOT will focus on the strengths and opportunities of SandyNet as a resource for continued economic development.

- **Phase 4: Draft and Final Documents:** Create your strategic planning and implementation documents with actionable, realistic, and measurable long-term results.

The facilitated meetings are the heart of our process and will be the foundation for the components of your strategic plan. Our proposal outlines a series of facilitated meetings over the course of the project (these meetings can be facilitated virtually with any combination of live webinars, prerecorded information, and PowerPoints). The meetings are designed to build understanding, create support for the goals and priorities, and engage your team in the implementation and final decisions.

Our approach is based on working with your Council, leadership, stakeholders as identified, and staff to determine expectations, discuss existing plans for the city, and how to tie in your economic partners and business leader in creating your future. Fostering agreement on what matters and alignment on priorities is a critical factor, and our goals would be to collaborate and empower the participants during the process to guide the strategic plan.

SBrand Solutions provides a full level of personal and administrative support to complete the project. The attached spreadsheet goes into more detail about the phases, tasks, timing, and proposal cost. We understand budget constraints and have offered our best advice on an approach that has proven to be successful with other clients.

{Technical Approach}

Big Picture Overview



A strategic plan answers four foundational questions:

- **Where are we now? (This will cover your questions:** Who and where are we? What is our community? What is our current economic base?)
- **Where are we going? (This will cover your questions:** Which direction should we go? What opportunities exist to expand the economic base, and how do we ensure all segments of our population benefit from economic growth in the city?)
- **How will we get there?** Through the creation your vision, mission, and core values, we will determine goals, strategies, and action steps to take you on the journey to success.
- **How will we know if we are successful?** Determining your desired outcomes and identifying specific metrics to measure achievements will not only show the internal team that you're on the road to success, but also your external stakeholders. These measurable outcomes will determine where Sandy is on the path charted by the strategic plan building momentum for success.

Phase 1: Project Launch, Design Process

The kickoff meeting to cover logistics, and our regular updates with staff, phone calls, and emails will guide the overall project and show us where we need to make changes and adjustments in our planning. We will cover and determine all the details about the schedule, process, and deliverables. We will discuss the specifics of interviews, workshops, document review, dates, and other logistics. As well, we will discuss engagement strategy with the staff, City Council, stakeholders, and the community in order for us to provide a sound engagement strategy for each.

The most important work during the kickoff is to solidify and plan **who to involve** in the process and **how to involve them**. For some, a short survey will be the best option. For others, attending a stakeholder meeting might be preferred. And some will give the best feedback during a personal interview. The best results are achieved by meeting people where they are in a way that makes the most sense to them – and that is at the



heart of inclusion and hearing those voices that may have been missing in the past. The **deliverables** for the Project Initiation and Initial Outreach phase will be:

- Detailed Project Schedule
- Stakeholder Engagement and Vision Plan
- Schedule of Engagement Meetings
 - o 2 Community Visioning Sessions
 - o 5 Stakeholder Focus Groups

We recommend a bi-weekly check-in video conference throughout the process and all phone calls and emails throughout the life of the project are included at no charge in our proposal. In addition, our background research on Sandy's business community, along with review of relevant documents will commence during this phase.

Phase 2: Stakeholder Engagement, SWOT, and Data Gathering

This is the phase where SBrand will lead and implement the engagement plans established and approved in the project kick-off phase along with continual research of previous strategic plans and relevant community economic data for the City of Sandy.

Our public outreach and engagement process will include:

- Regular bi-weekly meetings with Staff and the Project Leader
- 2 Stakeholder Visioning Sessions
- 5 Community Focus Groups
- All engagements will be unique, fun, and have creative engagement tools as needed (sticky notes, postcards, pop up white boards, webinars, videos) We also recommend walking tours of specific areas, as well as google map tours for community members to experience and provide feedback.

Throughout our project, our administrative staff will work with you on all the details to include scheduling in-person meetings, interviews, or updates as well as determining meeting locations and confirming the time and date of meetings; sending reminder emails; and creating reports and documentation.

1. Stakeholder Visioning Sessions (2) and Community Focus Groups (5)

These meetings will focus on the Sandy business community and economic development stakeholders. Working with City of Sandy staff to co-lead, these meetings will be engaging opportunities to get more information about the goals of the plan and solicit feedback and recommendations on what have been successful, and what needs to be addressed to ensure future success.

These meetings can be held both in-person and virtually, with SBrand providing engaging facilitation strategies to extract the most information possible while building community support, buy-in, and champions for the mission and vision of the plan.



2. Electronic Outreach Option

SBrand also understands the nature of not only pandemic-related outreach, but the general role technology plays in soliciting feedback and engaging the community. We use Konveio as a tool collect feedback, post meeting materials for response, share information with stakeholder groups, and provide plans for review in a fun and interactive manner to engage your community. SBrand also has social media specialists and can set up outreach with regular updates and engaging content during all phases of the plan. Also, Google Map tours, set up in conjunction with staff, can lead the community through specific areas of consideration on their own time through a virtual guided tour.

3. Reports and Information

The reports, photos and documentation during the process are an often-overlooked part of the transparency we use in creating your Plan. The reports (both written and video based) can be posted online, emailed out, or given to the board and staff for updates.

Phase 3: Facilitate Strategic Plan and SWOT Retreat

This is where our background shines! As Certified Master Facilitators® and Certified Virtual Facilitators™, we specialize in creating a meeting framework that is engaging, effective, and creates the specific desired outcomes. Our team handles it all: preparing meeting agendas, designing PowerPoints, creating meaningful group discussions, and drafting meeting minutes, reports, and recommendations.

To save travel expenses and other costs, we recommend holding a two-day retreat to complete the framework and details of the strategic plan. That two-day retreat will be fun, engaging, and effective! The retreat is timed in the process to happen AFTER the feedback has been received and digested so that enough information is at hand to allow full and complete conversations.

As a part of the facilitated meetings, we create an agenda with unique engagement techniques the promote critical thinking, open and honest conversations, and creative solutions to opportunities and barriers. We cover all of the components of a great strategic plan in addition to the specific issues that may have been identified during the engagement process. As you can see from the spreadsheet details, we work from the big picture (vision) to the specific tactics and operational details (metrics and action steps) to ensure nothing is missed.

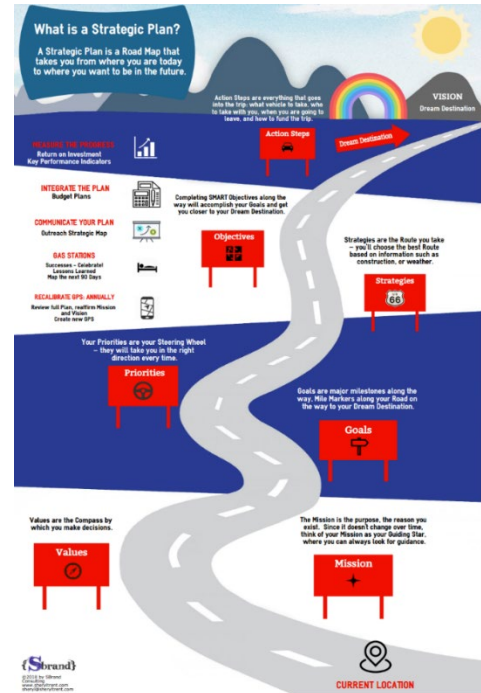
Employee Meetings

In our work, the group that often is overlooked as a part of the outreach process are employees. Holding a meeting to share information and gain feedback with staff is our recommended approach to ensuring their voice is also heard.

Phase 4: The Sandy Economic Development Strategic Plan with Implementation Plan

The overall Strategic Economic Development Plan is the guiding document created from all our work. This is your framework, your road map, your guide to the future of the city, and the key to measuring your successes. Our plans are customized to our clients but there are components to any Strategic Plan that are critical to long term success. While the language is often slightly different for each plan, it is important to have a clearly outlined and understandable:

- ✓ Vision
- ✓ Mission
- ✓ Core Values
- ✓ Guiding Principles
- ✓ Priorities/Pillars/Key Areas of Focus
- ✓ Evaluation of:
 - Targeted Sectors for Future Development
 - Business Attraction and Retention
 - Employment Lands
- ✓ Goals, Projects/Objectives and Strategies (GPS) with Outcomes
- ✓ SWOT (Strengths, Weaknesses, Opportunities and Threats)
- ✓ Specific Action Steps in an Action Plan that are realistic and achievable
- ✓ Measurables and Performance Metrics



This plan will incorporate the vision from relevant and applicable existing plans for the City of Sandy and Clackamas County such as the Pleasant Street Master Plan.

Review and analysis of existing demographic, economic, and labor force data.

Establishing a foundation of current data is key to building a great plan and setting the stage for future growth. Knowing where we are is essential to show the trends to guide the plan’s development and implementation. SBrand will be able to obtain data from the Bureau of Labor Statistics, Clackamas County, and the State of Oregon Department of Land Conservation and Development to get a picture of the current state of affairs. As well, using the data gained in working alongside ECONorthwest on the economic opportunities analysis will be integral to the research. However, no one is as knowledgeable as the people working and actively building the City of Sandy’s business and economic community today. Using the raw statistics from the aforementioned organizations, the information from the focus groups and community input sessions will also help establish future trends in economic growth.

The **Implementation Plan** (included with strategic plan) will be the actionable, realistic, “rubber meeting the road” part of the process. With measurable metrics and Key Performance Indicators as the driver, this operational plan will include roles, dates,



responsibilities, and resources. This detailed, tactical level conversation will take place in a separate meeting once the overarching strategic framework is near completion. While we create this work as a spreadsheet, many of our clients have and use implementation software (as simple as Trello or Monday.com or strategic planning software such as Envisio). We can work with any platform to ensure the details are accurate and entered correctly. You can view several examples of the Strategic Plans that we create with our clients at www.sbrandsolutions.com.

Executive Summary

We will also create an Executive Summary with recommendations and insights. The content will address:

- ✓ Best practices
- ✓ Policy changes needed
- ✓ New programs
- ✓ Activities and Projects
- ✓ Funding considerations
- ✓ Strategies for implementing the strategic plan

We have included an approach in our proposal an option for long term support that includes quarterly meetings to celebrate successes, talk about lessons learned, set Action Steps for the next quarter, and annually review the GPS. We will support you in that work with a series of templates, videos, workbooks, and tools that will create capacity within your internal team to continue to build on strategic success and have a sustainable approach to implementation.

Sbrand will continue to support the team in the implementation of the plan with check-in meetings quarterly for up to one year past adoption. Additionally, we can offer full plan update workshops with staff and stakeholders annually to refresh the plan, the mission, and goals.

{Deliverables}

- ✓ Initial Project Management Plan
- ✓ Project engagement plans for: EDAB, City Staff, Community and Stakeholder Engagement
- ✓ Comprehensive Strategic Economic Development Plan containing:
 - Vision
 - Mission
 - Core Values
 - Guiding Principles
 - Priorities/Pillars/Key Areas of Focus
 - Evaluation of:
 - Targeted Sectors for Future Development



- Business Attraction and Retention
 - Employment Lands
 - Goals, Projects/Objectives and Strategies (GPS) with Outcomes
 - SWOT (Strengths, Weaknesses, Opportunities and Threats)
 - Specific Action Steps in an Action Plan that are realistic and achievable
 - Measurables and Performance Metrics
-
- ✓ Reports and documentation from all facilitated meetings, surveys, and assessments
 - ✓ All raw data
 - ✓ All PowerPoint presentations and photos from meetings
 - ✓ Original graphic files for all work

{Summary}

Thank you for your consideration of our services! We appreciate the time it takes to have a process to select the right consultant as your partner, and we are happy to provide any information or resources that might be helpful to you. With our real-life experience working for (as employees and consultants) and with (as advisors, consultants, and partners) to local government organizations, we are confident that we can partner with you to create a process that engages your unique community and creates the comprehensive approach needed for your Strategic Plan.



{References}

Project: Custer County Economic Development Strategic Plan

Jay Prinz, Former Custer County Commissioner
PO Box 150
Westcliffe, Colorado
(719) 371-7979
jdp@jdprintz.com

Deliverable: Economic Development Strategic Plan and Implementation Plan for entire county encompassing tourism, job creation, tax base, diversity of the economy, housing and many more components.

Status: Complete

https://909dc6b6-7c64-47ad-9738-c2133857719c.filesusr.com/ugd/92b9d1_038f4c6e114944909a2d4d760f46ce7e.pdf

Project: Morgan County Tourism Plan

MORGAN COUNTY TOURISM
201 Ensign St.
Fort Morgan, CO 80701
970.542.3508

Deliverable: Economic Development/Tourism Strategic Plan for entire county with marketing brochure.

Status: Complete

<https://www.morgancountytourism.com/wp-content/uploads/2019/08/Tourism-Panel-Final-Complete-Strategic-Plan-Outline-and-Plan-updated-2019.pdf>

Project: Lee County (NC) Government Strategic Plan

Lee County, North Carolina
408 Summit Drive
Sanford, NC 27330

Deliverable: Comprehensive County-wide strategic plan

Status: Complete, with ongoing implementation support.

https://68369e22-5a1d-43a0-a124-20c2955f105c.filesusr.com/ugd/74a826_919935df9f3840d8a924841bfac796a2.pdf



{Phases, Tasks, Timing and Pricing}

Please see the attached for our recommendation.



{Appendices}

Cost and Timeline
Representative Projects

City of Sandy 15-Year Economic Development Strategic Plan

Phases, Tasks, Deliverables and Pricing



Phases and Tasks		Deliverable	Proposed Dates (To be determined by client)	Proposed Cost
Phase 1 - Project Initiation and Initial Outreach			April - Completion	
Task 1.1	Project Initiation Meeting (virtual or in-person) - 2 Hour Meeting	Logistics meeting to review framework, process, milestones and deliverables. Schedule development for conversations and meetings	Week of April 12	\$ 2,000.00
Task 1.2	Bi-Weekly planning meetings (Zoom) and emails throughout the project	For updates, feedback, course correction (held w/ EcDev Manager and EDAB)	Ongoing	Included
Task 1.3	Develop Detailed Project Schedule	Finalize list of meetings, input sessions, proposed Council date	At Initiation Meeting	\$ 250.00
Task 1.4	Develop Stakeholder Engagement and Vision Plan	Working with Staff and the EDAB, a comprehensive and inclusive public/private engagement plan. This will include community visioning and stakeholder meetings.	At Initiation Meeting	\$ 500.00
Task 1.5	Begin review of Major Relevant Documents		Week of April 12	Included
TOTAL PHASE 1				\$ 2,750.00
Phase 1 Deliverable: Approved project schedule, engagement process, identification of stakeholders, and collaborative scope, schedule and deliverables.				
Phase 2 - Stakeholder Engagement and Data Collection			April - June	
Task 2.1	Review of Major Plans and Information:	City and County Documents, Pleasant Street Plan	Week of April 12	\$ 500.00
Task 2.2	2 Community Visioning Sessions	2 Hours Each, In-Person or Virtual	April 28 and May 5	\$ 7,000.00
Task 2.3	5 Stakeholder Focus Groups	2- hrs Virtual and In-Person, (schedule to be determined with client)	April 28, 29; May 5, 6; May 12 (Virtual)	\$ 10,000.00
Task 2.8	Create Comprehensive Report on Stakeholder Engagement	Written Report to Client	By May 20, 2022	\$ 1,000.00
TOTAL PHASE 2				\$ 18,500.00
Phase 2 Deliverable: Report on Findings and Recommendations of Engagement, Survey and Interviews, and presentation to City Council Study Session				
Phase 3 - Facilitated Strategic Planning Meeting (Staff Retreat)			June 2022.	
Task 3.1	In-Person Retreat with Economic Development Staff and Steering Committee (Recommend 2 days, 6 Hours/Day retreat with breaks)		June 8-9	\$ 12,000.00
Task 3.2	Craft Mission, Vision, and Core Values		At Retreat	Included
Task 3.3	Create Future Targeted Sectors for Development		Retreat - June 24	Included
Task 3.4	Create Development Strategies for Employment Lands		Retreat - June 24	Included
Task 3.5	Evaluate Business, Retention, and Expansion		Retreat - June 24	\$ 3,000.00
Task 3.6	Create Strategic Goals, Objectives, and Opportunities to incorporate into Plan		At Retreat	Included
TOTAL PHASE 3				\$ 15,000.00
Phase 3 Deliverable: Report on Retreat and Draft BRE Plan				
Phase 4 - Create and Draft New 10-Year Economic Development Strategic Plan			June	
Task 4.1	Write Draft 10-year Economic Development Strategic Plan (Includes Implementation Plan)		June 10 - June 24	\$ 3,000.00
Task 4.2	Initial review of draft by client (outline revisions)		June 27 - July 1	Included
Task 4.3	Develop Second Draft for Final		July 6 - July 13	\$ 500.00
Task 4.4	SBrand submits final 10 Year Plan to City of Sandy		July 18, 2022	Included
Task 4.5	Prepare Plan for Staff Presentation to Sandy City Council		July 18, 2022	\$ 1,000.00
TOTAL PHASE 4				\$ 4,500.00
Phase 4 Deliverable: Draft Final Strategic Plan with Implementation Documents				
Ongoing Support and Implementation				
Task 5.1	Quarterly Check-in and Review Meetings	Three Meetings at \$2000ea	Sept 22, Jan 23, Apr 23,	\$ 6,000.00
TOTAL PHASE 5				\$ 6,000.00
Phase 5 Deliverable: Facilitation of Annual Update Meetings, Draft written report for each				
Total Cost				\$ 52,750.00
Travel Costs for up to three (3) onsite meetings		Includes all travel costs (hotel meals, flight, mileage, and travel time)		\$ 2,250.00
Total Not To Exceed Cost				\$ 55,000.00