



CITY OF GRAND JUNCTION, COLORADO

PROFESSIONAL SERVICES CONTRACT

This CONTRACT made and entered into this **30th** day of **June, 2021** by and between the **City of Grand Junction, Colorado**, a government entity in the County of Mesa, State of Colorado, hereinafter in the Contract Documents referred to as the "Owner" and **SBrand Solutions, Fort Collins, Colorado**, hereinafter in the Contract Documents referred to as the "Contractor."

The Contractor shall perform the work set forth and described by the Solicitation Documents and known as **RFP-4891-21-SH Strategic Planning Consultant**.

The total amount of the Contract shall not exceed **\$15,400.00** paid by the Owner. The Contractor shall be paid in accordance with the work set forth in the Solicitation Documents.

To receive payment, Contractor must **submit invoices to Greg LeBlanc, Senior Assistant to the City Manager, gregoryl@gjcity.org** for work completed.

Contract Administrator for the Owner is **Greg LeBlanc, Senior Assistant to the City Manager, gregoryl@gjcity.org, 970-244-1557**.

Contract Administrator for the Contractor is **Sheryl Trent, Owner and Project Manager, sheryl@sbrandsolutions.com, 970-208-6633**.

The term of this Contract shall be from **June 29, 2021 to final completion, or December 31, 2021**.

Contractor shall provide the insurance bonds and indemnities required in the Solicitation Documents.

Contract Documents: The clauses provided in the Solicitation apply to the terms used in the Contract and all the Contract Documents. It is agreed by the parties hereto that the following list of instruments, drawings, and documents which are attached hereto, bound herewith, or incorporated herein by reference constitute and shall be referred to either as the "Contract Documents" or the Contract, and all of said instruments, drawings, and documents together as a whole constitute the Contract between the parties hereto, and they are fully a part of this agreement as if they were set out verbatim and in full herein.

The order of contract document governance shall be as follows:

- a. The body of this contract agreement
- b. Solicitation Documents for the Project and all Addenda; **RFP-4891-21-SH**;
- c. Contractors Response to the Solicitation
- d. Change Orders.

CITY OF GRAND JUNCTION, COLORADO

DocuSigned by:
By: Greg Caton
Greg Caton, City Manager

6/30/2021 | 15:26 MDT
Date

SBRAND SOLUTIONS

DocuSigned by:
By: Sheryl Trent
Title: Sheryl Trent, Owner

6/30/2021 | 14:22 PDT
Date



**Request for Proposal
RFP-4891-21-SH**

STRATEGIC PLANNING CONSULTANT

RESPONSES DUE:

March 25, 2021 prior to 2:30 P.M.

Accepting Electronic Responses Only

Responses Only Submitted Through the Rocky Mountain E-Purchasing System

<http://www.bidnetdirect.com/colorado>

(Purchasing Representative does not have access or control of the vendor side of RMEPS. If website or other problems arise during response submission, vendor **MUST** contact RMEPS to resolve issue prior to the response deadline. 800-835-4603)

**This Proposal will be opened publicly in a virtual meeting:
Please join Strategic Planning Consultant RFP-4891-21-SH on GoToConnect
from your computer using the Chrome browser.
<https://my.jive.com/meet/441981573>**

**You can also dial in using your phone.
US: (646) 749-3129**

**Access Code: 441-981-573
Audio PIN 1**

PURCHASING REPRESENTATIVE:

Susan Hyatt
susanh@gjcity.org
970/244-1513

This solicitation has been developed specifically for a Request for Proposal intended to solicit competitive responses for this solicitation, and may not be the same as previous City of Grand Junction solicitations. All offerors are urged to thoroughly review this solicitation prior to submitting. Submittal by **FAX, EMAIL or HARD COPY IS NOT ACCEPTABLE** for this solicitation.

REQUEST FOR PROPOSAL

Strategic Planning Consultant

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REQUEST FOR PROPOSAL

SECTION 1.0: ADMINISTRATIVE INFORMATION & CONDITIONS FOR SUBMITTAL

- 1.1 Issuing Office:** This Request for Proposal (RFP) is issued for the City of Grand Junction (City) on behalf of the Administration Department. All contact regarding this RFP is directed to:

RFP QUESTIONS:

Susan Hyatt

susanh@gjcity.org

The City would like to remind all Contractors, Sub-Contractors, Vendors, Suppliers, Manufacturers, Service Providers, etc. that (with the exception of Pre-Bid or Site Visit Meetings) all questions, inquiries, comments, or communication pertaining to any formal solicitation (whether process, specifications, scope, etc.) must be directed (in writing) to the Purchasing Agent assigned to the project. Direct communication with the City assigned Project Managers/Engineers is not appropriate for public procurement prior to award, and may result in disqualification.

- 1.2 Purpose:** The purpose of this RFP is to obtain proposals from qualified professional firms or individuals to provide the facilitation and creation of a two-year strategic plan for the City of Grand Junction City Council.
- 1.3 Compliance:** All participating Offerors, by their signature hereunder, shall agree to comply with all conditions, requirements, and instructions of this RFP as stated or implied herein. Should the City omit anything from this packet which is necessary to the clear understanding of the requirements, or should it appear that various instructions are in conflict, the Offeror(s) shall secure instructions from the Purchasing Division prior to the date and time of the submittal deadline shown in this RFP.
- 1.4 Procurement Process:** Procurement processes shall be governed by the most current version of the City of Grand Junction [Purchasing Policy and Procedure Manual](#).
- 1.5 Submission:** Please refer to section 5.0 for what is to be included. **Each proposal shall be submitted in electronic format only through the Rocky Mountain E-Purchasing website, <http://www.bidnetdirect.com/colorado>.** *This site offers both “free” and “paying” registration options that allow for full access of the City’s documents and for electronic submission of proposals. (Note: “free” registration may take up to 24 hours to process. Please Plan accordingly.)* **The uploaded response to this RFP shall be a single PDF document with all required information included.** For proper comparison and evaluation, the City requests that proposals be formatted as directed in Section 5.0 “Preparation and Submittal of Proposals.” Submittals received that fail to follow this format may be ruled non-responsive.

**This Proposal will be opened publicly in a virtual meeting:
Please join Strategic Planning Consultant RFP-4891-21-SH on GoToConnect
from your computer using the Chrome browser.**

<https://my.jive.com/meet/441981573>

**You can also dial in using your phone.
US: (646) 749-3129**

**Access Code: 441-981-573
Audio PIN 1**

- 1.6 Altering Proposals:** Any alterations made prior to opening date and time must be initialed by the signer of the proposal, guaranteeing authenticity. Proposals cannot be altered or amended after submission deadline.
- 1.7 Withdrawal of Proposal:** A proposal must be firm and valid for award and may not be withdrawn or canceled by the Offeror prior to the sixty-first (61st) day following the submittal deadline date and only prior to award. The Offeror so agrees upon submittal of their proposal. After award this statement is not applicable.
- 1.8 Acceptance of Proposal Content:** The contents of the proposal of the successful Offeror shall become contractual obligations if acquisition action ensues. Failure of the successful Offeror to accept these obligations in a contract shall result in cancellation of the award and such vendor shall be removed from future solicitations.
- 1.9 Exclusion:** No oral, telegraphic, or telephonic proposals shall be considered.
- 1.10 Addenda:** All Questions shall be submitted in writing to the appropriate person as shown in Section 1.1. Any interpretations, corrections and changes to this RFP or extensions to the opening/receipt date shall be made by a written Addendum to the RFP by the City Purchasing Division. Sole authority to authorize addenda shall be vested in the City of Grand Junction Purchasing Representative. Addenda will be issued electronically through the Rocky Mountain E-Purchasing website at www.bidnetdirect.com/colorado. Offerors shall acknowledge receipt of all addenda in their proposal.
- 1.11 Exceptions and Substitutions:** All proposals meeting the intent of this RFP shall be considered for award. Offerors taking exception to the specifications shall do so at their own risk. The City reserves the right to accept or reject any or all substitutions or alternatives. When offering substitutions and/or alternatives, Offeror must state these exceptions in the section pertaining to that area. Exception/substitution, if accepted, must meet or exceed the stated intent and/or specifications. The absence of such a list shall indicate that the Offeror has not taken exceptions, and if awarded a contract, shall hold the Offeror responsible to perform in strict accordance with the specifications or scope of work contained herein.
- 1.12 Confidential Material:** All materials submitted in response to this RFP shall ultimately become public record and shall be subject to inspection after contract award. **“Proprietary or Confidential Information”** is defined as any information that is not generally known to competitors and which provides a competitive advantage. Unrestricted disclosure of proprietary information places it in the public domain. Only submittal information clearly identified with the words **“Confidential Disclosure”** and uploaded as a separate document

shall establish a confidential, proprietary relationship. Any material to be treated as confidential or proprietary in nature must include a justification for the request. The request shall be reviewed and either approved or denied by the Purchasing Supervisor. If denied, the proposer shall have the opportunity to withdraw its entire proposal, or to remove the confidential or proprietary restrictions. Neither cost nor pricing information nor the total proposal shall be considered confidential or proprietary.

- 1.13 Response Material Ownership:** All proposals become the property of the City upon receipt and shall only be returned to the proposer at the City's option. Selection or rejection of the proposal shall not affect this right. The City shall have the right to use all ideas or adaptations of the ideas contained in any proposal received in response to this RFP, subject to limitations outlined in the section 1.12 entitled "Confidential Material". Disqualification of a proposal does not eliminate this right.
- 1.14 Minimal Standards for Responsible Prospective Offerors:** A prospective Offeror must affirmably demonstrate their responsibility. A prospective Offeror must meet the following requirements:
- Have adequate financial resources, or the ability to obtain such resources as required.
 - Be able to comply with the required or proposed completion schedule.
 - Have a satisfactory record of performance.
 - Have a satisfactory record of integrity and ethics.
 - Be otherwise qualified and eligible to receive an award and enter into a contract with the City.
- 1.15 Open Records:** Proposals shall be received and publicly acknowledged at the location, date, and time stated herein. Offerors, their representatives and interested persons may be present. Proposals shall be received and acknowledged only so as to avoid disclosure of process. However, all proposals shall be open for public inspection after the contract is awarded. Trade secrets and confidential information contained in the proposal so identified by offer as such shall be treated as confidential by the City to the extent allowable in the Open Records Act.
- 1.16 Sales Tax:** City of Grand Junction is, by statute, exempt from the State Sales Tax and Federal Excise Tax; therefore, all fees shall not include taxes.
- 1.17 Public Opening:** Proposals shall be opened in the City Hall Auditorium immediately following the proposal deadline. Offerors, their representatives and interested persons may be present. Only the names and locations on the proposing firms will be disclosed.

SECTION 2.0: GENERAL CONTRACT TERMS AND CONDITIONS

- 2.1. Acceptance of RFP Terms:** A proposal submitted in response to this RFP shall constitute a binding offer. Acknowledgment of this condition shall be indicated on the Letter of Interest or Cover Letter by the autographic signature of the Offeror or an officer of the Offeror legally authorized to execute contractual obligations. A submission in response to the RFP acknowledges acceptance by the Offeror of all terms and conditions including compensation, as set forth herein. An Offeror shall identify clearly and thoroughly any variations between its proposal and the City's RFP requirements. Failure to do so shall

be deemed a waiver of any rights to subsequently modify the terms of performance, except as outlined or specified in the RFP.

- 2.2. Execution, Correlation, Intent, and Interpretations:** The Contract Documents shall be signed in not less than triplicate by the City and Contractor. City will provide the contract. By executing the contract, the Contractor represents that he/she has visited the site, familiarized himself with the local conditions under which the Work is to be performed, and correlated his observations with the requirements of the Contract Documents. The Contract Documents are complementary, and what is required by any one, shall be as binding as if required by all. The intention of the documents is to include all labor, materials, equipment and other items necessary for the proper execution and completion of the scope of work as defined in the technical specifications and drawings contained herein. All drawings, specifications and copies furnished by the City are, and shall remain, City property. They are not to be used on any other project, and with the exception of one contract set for each party to the contract, are to be returned to the owner on request at the completion of the work.
- 2.3. Permits, Fees, & Notices:** The Contractor shall secure and pay for all permits, governmental fees and licenses necessary for the proper execution and completion of the work. The Contractor shall give all notices and comply with all laws, ordinances, rules, regulations and orders of any public authority bearing on the performance of the work. If the Contractor observes that any of the Contract Documents are at variance in any respect, he shall promptly notify the City in writing, and any necessary changes shall be adjusted by approximate modification. If the Contractor performs any work knowing it to be contrary to such laws, ordinances, rules and regulations, and without such notice to the City, he shall assume full responsibility and shall bear all costs attributable.
- 2.4. Amendment:** No oral statement of any person shall modify or otherwise change, or affect the terms, conditions or specifications stated in the resulting contract. All amendments to the contract shall be made in writing by the City Purchasing Division.
- 2.5. Assignment:** The Offeror shall not sell, assign, transfer or convey any contract resulting from this RFP, in whole or in part, without the prior written approval from the City.
- 2.6. Compliance with Laws:** Proposals must comply with all Federal, State, County and local laws governing or covering this type of service and the fulfillment of all ADA (Americans with Disabilities Act) requirements.
- 2.7. Confidentiality:** All information disclosed by the City to the Offeror for the purpose of the work to be done or information that comes to the attention of the Offeror during the course of performing such work is to be kept strictly confidential.
- 2.8. Conflict of Interest:** No public official and/or City employee shall have interest in any contract resulting from this RFP.
- 2.9. Contract:** This Request for Proposal, submitted documents, and any negotiations, when properly accepted by the City, shall constitute a contract equally binding between the City and Offeror. The contract represents the entire and integrated agreement between the parties hereto and supersedes all prior negotiations, representations, or agreements,

either written or oral, including the Proposal documents. The contract may be amended or modified with Change Orders, Field Orders, or Addendums.

- 2.10. Project Manager/Administrator:** The Project Manager, on behalf of the City, shall render decisions in a timely manner pertaining to the work proposed or performed by the Offeror. The Project Manager shall be responsible for approval and/or acceptance of any related performance of the Scope of Services.
- 2.11. Contract Termination:** This contract shall remain in effect until any of the following occurs: (1) contract expires; (2) completion of services; (3) acceptance of services or, (4) for convenience terminated by either party with a written *Notice of Cancellation* stating therein the reasons for such cancellation and the effective date of cancellation at least thirty days past notification.
- 2.12. Employment Discrimination:** During the performance of any services per agreement with the City, the Offeror, by submitting a Proposal, agrees to the following conditions:
- 2.12.1.** The Offeror shall not discriminate against any employee or applicant for employment because of race, religion, color, sex, age, disability, citizenship status, marital status, veteran status, sexual orientation, national origin, or any legally protected status except when such condition is a legitimate occupational qualification reasonably necessary for the normal operations of the Offeror. The Offeror agrees to post in conspicuous places, visible to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.
 - 2.12.2.** The Offeror, in all solicitations or advertisements for employees placed by or on behalf of the Offeror, shall state that such Offeror is an Equal Opportunity Employer.
 - 2.12.3.** Notices, advertisements, and solicitations placed in accordance with federal law, rule, or regulation shall be deemed sufficient for the purpose of meeting the requirements of this section.
- 2.13. Immigration Reform and Control Act of 1986 and Immigration Compliance:** The Offeror certifies that it does not and will not during the performance of the contract employ illegal alien workers or otherwise violate the provisions of the Federal Immigration Reform and Control Act of 1986 and/or the immigration compliance requirements of State of Colorado C.R.S. § 8-17.5-101, *et.seq.* (House Bill 06-1343).
- 2.14. Ethics:** The Offeror shall not accept or offer gifts or anything of value nor enter into any business arrangement with any employee, official, or agent of the City.
- 2.15. Failure to Deliver:** In the event of failure of the Offeror to deliver services in accordance with the contract terms and conditions, the City, after due oral or written notice, may procure the services from other sources and hold the Offeror responsible for any costs resulting in additional purchase and administrative services. This remedy shall be in addition to any other remedies that the City may have.
- 2.16. Failure to Enforce:** Failure by the City at any time to enforce the provisions of the contract shall not be construed as a waiver of any such provisions. Such failure to enforce shall

not affect the validity of the contract or any part thereof or the right of the City to enforce any provision at any time in accordance with its terms.

- 2.17. Force Majeure:** The Offeror shall not be held responsible for failure to perform the duties and responsibilities imposed by the contract due to legal strikes, fires, riots, rebellions, and acts of God beyond the control of the Offeror, unless otherwise specified in the contract.
- 2.18. Indemnification:** Offeror shall defend, indemnify and save harmless the City, State of Colorado, and all its officers, employees, insurers, and self-insurance pool, from and against all liability, suits, actions, or other claims of any character, name and description brought for or on account of any injuries or damages received or sustained by any person, persons, or property on account of any negligent act or fault of the Offeror, or of any Offeror's agent, employee, subcontractor or supplier in the execution of, or performance under, any contract which may result from proposal award. Offeror shall pay any judgment with cost which may be obtained against the City growing out of such injury or damages.
- 2.19. Independent Firm:** The Offeror shall be legally considered an Independent Firm and neither the Firm nor its employees shall, under any circumstances, be considered servants or agents of the City. The City shall be at no time legally responsible for any negligence or other wrongdoing by the Firm, its servants, or agents. The City shall not withhold from the contract payments to the Firm any federal or state unemployment taxes, federal or state income taxes, Social Security Tax or any other amounts for benefits to the Firm. Further, the City shall not provide to the Firm any insurance coverage or other benefits, including Workers' Compensation, normally provided by the City for its employees.
- 2.20. Nonconforming Terms and Conditions:** A proposal that includes terms and conditions that do not conform to the terms and conditions of this Request for Proposal is subject to rejection as non-responsive. The City reserves the right to permit the Offeror to withdraw nonconforming terms and conditions from its proposal prior to a determination by the City of non-responsiveness based on the submission of nonconforming terms and conditions.
- 2.21. Ownership:** All plans, prints, designs, concepts, etc., shall become the property of the City.
- 2.22. Oral Statements:** No oral statement of any person shall modify or otherwise affect the terms, conditions, or specifications stated in this document and/or resulting agreement. All modifications to this request and any agreement must be made in writing by the City.
- 2.23. Patents/Copyrights:** The Offeror agrees to protect the City from any claims involving infringements of patents and/or copyrights. In no event shall the City be liable to the Offeror for any/all suits arising on the grounds of patent(s)/copyright(s) infringement. Patent/copyright infringement shall null and void any agreement resulting from response to this RFP.
- 2.24. Remedies:** The Offeror and City agree that both parties have all rights, duties, and remedies available as stated in the Uniform Commercial Code.

- 2.25. Venue:** Any agreement as a result of responding to this RFP shall be deemed to have been made in, and shall be construed and interpreted in accordance with, the laws of the City of Grand Junction, Mesa County, Colorado.
- 2.26. Expenses:** Expenses incurred in preparation, submission and presentation of this RFP are the responsibility of the company and can not be charged to the City.
- 2.27. Sovereign Immunity:** The City specifically reserves its right to sovereign immunity pursuant to Colorado State Law as a defense to any action arising in conjunction to this agreement.
- 2.28. Public Funds/Non-Appropriation of Funds:** Funds for payment have been provided through the City of Grand Junction budget approved by the City Council for the stated fiscal year only. State of Colorado statutes prohibit the obligation and expenditure of public funds beyond the fiscal year for which a budget has been approved. Therefore, anticipated orders or other obligations that may arise past the end of the stated City of Grand Junction fiscal year shall be subject to budget approval. Any contract will be subject to and must contain a governmental non-appropriation of funds clause.
- 2.29. Collusion Clause:** Each Offeror by submitting a proposal certifies that it is not party to any collusive action or any action that may be in violation of the Sherman Antitrust Act. Any and all proposals shall be rejected if there is evidence or reason for believing that collusion exists among the proposers. The City may or may not, at the discretion of the City Purchasing Representative, accept future proposals for the same service or commodities for participants in such collusion.
- 2.30. Gratuities:** The proposer certifies and agrees that no gratuities, kickbacks or contingency fees were paid in connection with this contract, nor were any fees, commissions, gifts or other considerations made contingent upon the award of this contract. If the proposer breaches or violates this warranty, the City may, at their discretion, terminate this contract without liability to the City.
- 2.31. Safety Warranty:** Offeror also warrants that the services performed shall conform to the standards declared by the US Department of Labor under the Occupational Safety and Health Act of 1970.
- 2.32. OSHA Standards:** All Offerors agree and warrant that services performed in response to this invitation shall conform to the standards declared by the US Department of Labor under the Occupational Safety and Health Act of 1970 (OSHA). In the event the services do not conform to OSHA Standards, the City may require the services to be redone at no additional expense to the City.
- 2.33. Performance of the Contract:** The City reserves the right to enforce the performance of the contract in any manner prescribed by law or deemed to be in the best interest of the City in the event of breach or default of resulting contract award.
- 2.34. Benefit Claims:** The City shall not provide to the Offeror any insurance coverage or other benefits, including Worker's Compensation, normally provided by the City for its employees.

- 2.35. Default:** The City reserves the right to terminate the contract immediately in the event the Offeror fails to meet delivery or completion schedules, or otherwise perform in accordance with the accepted proposal. Breach of contract or default authorizes the Owner to purchase like services elsewhere and charge the full increase in cost to the defaulting Offeror.
- 2.36. Multiple Offers:** Proposers must determine for themselves which product to offer. If said proposer chooses to submit more than one offer, THE ALTERNATE OFFER must be clearly marked "Alternate Proposal". The City reserves the right to make award in the best interest of the City.
- 2.37. Cooperative Purchasing:** Purchases as a result of this solicitation are primarily for the City. Other governmental entities may be extended the opportunity to utilize the resultant contract award with the agreement of the successful provider and the participating agencies. All participating entities will be required to abide by the specifications, terms, conditions and pricings established in this Proposal. The quantities furnished in this proposal document are for only the City. It does not include quantities for any other jurisdiction. The City will be responsible only for the award for our jurisdiction. Other participating entities will place their own awards on their respective Purchase Orders through their purchasing office or use their purchasing card for purchase/payment as authorized or agreed upon between the provider and the individual entity. The City accepts no liability for payment of orders placed by other participating jurisdictions that choose to piggy-back on our solicitation. Orders placed by participating jurisdictions under the terms of this solicitation will indicate their specific delivery and invoicing instructions.
- 2.38. Definitions:**
- 2.38.1.** "Contractor" refers to the person, partnership, firm or corporation entering into an Agreement with the City for the services required and the legal representatives of said party or the agent appointed to act for said party in the performance of the service(s) contracted for.
- 2.38.2.** "Offeror" refers to the person or persons legally authorized by the Consultant to make an offer and/or submit a bid (fee) proposal in response to the City's RFP.
- 2.38.3.** The term "Work" includes all labor necessary to produce the requirements by the Contract Documents, and all materials and equipment incorporated or to be incorporated in such construction.
- 2.38.4.** "City" is the City of Grand Junction, Colorado and is referred to throughout the Contract Documents. The term City means the City or his authorized representative. The City shall, at all times, have access to the work wherever it is in preparation and progress. The Contractor shall provide facilities for such access. The City will make periodic visits to the site to familiarize himself generally with the progress and quality of work and to determine, in general, if the work is proceeding in accordance with the contract documents. Based on such observations and the Contractor's Application for Payment, the City will determine the amounts owing to the Contractor and will issue Certificates for Payment in such amounts, as provided in the contract. The City will have authority to reject work which does not conform to the Contract documents. Whenever, in his reasonable opinion, he considers it necessary or advisable to insure the proper implementation of the intent of the Contract Documents, he will have authority to require the Contractor to stop the work or any portion, or to

require special inspection or testing of the work, whether or not such work can be then be fabricated, installed, or completed. The City will not be responsible for the acts or omissions of the Contractor, and sub-Contractor, or any of their agents or employees, or any other persons performing any of the work.

- 2.38.5.** "Contractor" is the person or organization identified as such in the Agreement and is referred to throughout the Contract Documents. The term Contractor means the Contractor or his authorized representative. The Contractor shall carefully study and compare the General Contract Conditions of the Contract, Specification and Drawings, Scope of Work, Addenda and Modifications and shall at once report to the City any error, inconsistency, or omission he may discover. Contractor shall not be liable to the City for any damage resulting from such errors, inconsistencies, or omissions. The Contractor shall not commence work without clarifying Drawings, Specifications, or Interpretations.
- 2.38.6.** "Sub-Contractor is a person or organization who has a direct contract with the Contractor to perform any of the work at the site. The term sub-contractor is referred to throughout the contract documents and means a sub-contractor or his authorized representative.

2.39 Public Disclosure Record: If the bidder has knowledge of their employee(s) or sub-Bidders having an immediate family relationship with a City employee or elected official, the bidder must provide the Purchasing Representative with the name(s) of these individuals. These individuals are required to file an acceptable "Public Disclosure Record", a statement of financial interest, before conducting business with the City.

2.40 Keep Jobs in Colorado Act: Developer shall be responsible for ensuring compliance with Article 17 of Title 8, Colorado Revised Statutes requiring 80% Colorado labor to be employed on public works projects. Developer shall, upon reasonable notice provided by the City, permit the City to inspect documentation of identification and residency required by C.R.S. §8-17-101(2)(a). If Developer claims it is entitled to a waiver pursuant to C.R.S. §8-17-101(1), Developer shall state that there is insufficient Colorado labor to perform the work such that compliance with Article 17 would create an undue burden that would substantially prevent a project from proceeding to completion, and shall include evidence demonstrating the insufficiency and undue burden in its response.

Unless expressly granted a waiver by the City pursuant to C.R.S. §8-17-101(1), Developer shall be responsible for ensuring compliance with Article 17 of Title 8, Colorado Revised Statutes requiring 80% Colorado labor to be employed on public works. Developer shall, upon reasonable notice provided by the City, permit the City to inspect documentation of identification and residency required by C.R.S. §8-17-101(2)(a).

"Public Works project" is defined as:

- (a) any construction, alteration, repair, demolition, or improvement of any land, building, structure, facility, road, highway, bridge, or other public improvement suitable for and intended for use in the promotion of the public health, welfare, or safety and any maintenance programs for the upkeep of such projects
- (b) for which appropriate or expenditure of moneys may be reasonably expected to be \$500,000.00 or more in the aggregate for any fiscal year

SECTION 3.0: INSURANCE REQUIREMENTS

Insurance Requirements: The selected Firm agrees to procure and maintain, at its own cost, policy(s) of insurance sufficient to insure against all liability, claims, demands, and other obligations assumed by the Firm pursuant to this Section. Such insurance shall be in addition to any other insurance requirements imposed by this Contract or by law. The Firm shall not be relieved of any liability, claims, demands, or other obligations assumed pursuant to this Section by reason of its failure to procure or maintain insurance in sufficient amounts, durations, or types.

Firm shall procure and maintain and, if applicable, shall cause any Subcontractor of the Firm to procure and maintain insurance coverage listed below. Such coverage shall be procured and maintained with forms and insurers acceptable to The City. All coverage shall be continuously maintained to cover all liability, claims, demands, and other obligations assumed by the Firm pursuant to this Section. In the case of any claims-made policy, the necessary retroactive dates and extended reporting periods shall be procured to maintain such continuous coverage. Minimum coverage limits shall be as indicated below unless specified otherwise in the Special Conditions:

(a) Worker Compensation insurance to cover obligations imposed by applicable laws for any employee engaged in the performance of work under this Contract, and Employers' Liability insurance with minimum limits of:

ONE MILLION DOLLARS (\$1,000,000) each accident,
ONE MILLION DOLLARS (\$1,000,000) disease - policy limit, and
ONE MILLION DOLLARS (\$1,000,000) disease - each employee

(b) General Liability insurance with minimum combined single limits of:

ONE MILLION DOLLARS (\$1,000,000) each occurrence and
ONE MILLION DOLLARS (\$1,000,000) per job aggregate.

The policy shall be applicable to all premises and operations. The policy shall include coverage for bodily injury, broad form property damage (including completed operations), personal injury (including coverage for contractual and employee acts), blanket contractual, products, and completed operations. The policy shall include coverage for explosion, collapse, and underground hazards. The policy shall contain a severability of interests provision.

(c) Comprehensive Automobile Liability insurance with minimum combined single limits for bodily injury and property damage of not less than:

ONE MILLION DOLLARS (\$1,000,000) each occurrence and
ONE MILLION DOLLARS (\$1,000,000) aggregate

This policy shall provide coverage to protect the contractor against liability incurred as a result of the professional services performed as a result of responding to this Solicitation.

With respect to each of Consultant's owned, hired, or non-owned vehicles assigned to be used in performance of the Work. The policy shall contain a severability of interests provision. The policies required by paragraphs (a), (b), and (c) above shall be endorsed to include the City and

the City's officers and employees as additional insureds. Every policy required above shall be primary insurance, and any insurance carried by the City, its officers, or its employees, or carried by or provided through any insurance pool of the City, shall be excess and not contributory insurance to that provided by Consultant. No additional insured endorsement to any required policy shall contain any exclusion for bodily injury or property damage arising from completed operations. The Consultant shall be solely responsible for any deductible losses under any policy required above.

SECTION 4.0: SPECIFICATIONS/SCOPE OF SERVICES

- 4.1 General/Background:** The purpose of this RFP is to obtain proposals from qualified professional firms or individuals to provide the facilitation and creation of a two-year strategic plan for the City of Grand Junction City Council.

The services of the awarded consulting firm or individual include a complete two-year strategic plan to be undertaken in two phases, as indicated below. The Owner expects the selected consultant to be engaged for the complete project through both phases, with a final report at the outcome.

4.1.1 PHASE 1

- 4.1.1.1** Review the City's Comprehensive Plan
- 4.1.1.2** Meet individually with each Council member to understand each person's vision and goals over the next two years.
- 4.1.1.3** Identify areas in which individual Councilmember's goals align with the adopted Comprehensive Plan's vision and guiding principles.
- 4.1.1.4** Identify common themes or areas of focus.
- 4.1.1.5** Facilitate a 2-3-hour workshop session with Councilmembers, City Manager and City Attorney resulting in the establishment of expectations for a high-functioning organization.
- 4.1.1.6** Facilitate a 4–6-hour workshop session resulting in the establishment of high-level goals and council priorities.

4.1.2 PHASE 2

- 4.1.2.1** Review Draft Implementation matrix.
- 4.1.2.2** Identify areas in which the Draft Implementation Matrix does/does not align with Council high-level goals and priorities.
- 4.1.2.3** Facilitate a meeting with executive leadership staff members to develop strategies and refine the Draft Implementation matrix to achieve the Council identified goals/priorities.
- 4.1.2.4** Develop two final products:
 - A)** A final two-year Strategic Plan that details the specific goals and priorities of this City Council that identifies alignment with the City's Comprehensive Plan and it's guiding principles.
 - B)** A final Implementation Matrix that details strategies, resources, partners, department/division leads and timeline.

- 4.2 Timeline:** It is expected individual Council interviews will be conducted within two weeks from the 2021 election held on April 6. Of the seven total City Council positions, three are incumbent positions that will not be affected by this year's election. Individual meetings/interviews for these three positions could begin prior to the April 6th election.

- 4.3 Implementation/Final Report:** The implementation of this project will be determined by the consultant whose timeline will be used as one of the evaluation criteria. Please provide a good faith estimate of when the final report can be delivered.

4.4 RFP Tentative Time Schedule:

Request for Proposal available	March 4, 2021
Inquiry deadline, no questions after this date	March 12, 2021
Addendum issue, if required	March 16, 2021
Submittal deadline for proposals	March 25, 2021 prior to 2:30 PM
City evaluation of proposals	March 25 – April 8, 2021
Final selection	April 9, 2021
Contract execution	April 12, 2021

**This Proposal will be opened publicly in a virtual meeting:
Please join Strategic Planning Consultant RFP-4891-21-SH on GoToConnect
from your computer using the Chrome browser.
<https://my.jive.com/meet/441981573>**

**You can also dial in using your phone.
US: (646) 749-3129**

**Access Code: 441-981-573
Audio PIN 1**

SECTION 5.0: PREPARATION AND SUBMITTAL OF PROPOSALS

Submission: Each proposal shall be submitted in electronic format only through the Rocky Mountain E-Purchasing website, <http://www.bidnetdirect.com/colorado>. This site offers both “free” and “paying” registration options that allow for full access of the City’s documents and for electronic submission of proposals. (Note: “free” registration may take up to 24 hours to process. Please Plan accordingly.) The uploaded response to this RFP shall be a single PDF document with all required information included. For proper comparison and evaluation, the City requests that proposals be formatted as directed. Offerors are required to indicate their interest in this Project, show their specific experience and address their capability to perform the Scope of Services in the Time Schedule as set forth herein. For proper comparison and evaluation, the City requires that proposals be formatted **A to F**.

- A. Cover Letter:** Cover letter shall be provided which explains the Firm’s interest in the project. The letter shall contain the name/address/phone number of the person who will serve as the firm’s principal contact person with City’s Contract Administrator and shall identify individual(s) who will be authorized to make presentations on behalf of the firm. The statement shall bear the signature of the person having proper authority to make formal commitments on behalf of the firm. By submitting a response to this solicitation the Contractor agrees to all requirements herein.
- B. Qualifications/Experience/Credentials:** Proposers shall provide their qualifications for consideration as a Recruiting Firm to the City of Grand Junction and include prior experience in similar projects.
- C. Strategy and Implementation Plan:** Describe your (the firm’s) interpretation of the City’s objectives with regard to this RFP. Describe the proposed strategy and/or plan for achieving the objectives of this RFP. The Firm may utilize a written narrative or any other printed technique to demonstrate his/her ability to satisfy the Scope of Services. The narrative should describe a logical progression of tasks and efforts starting with the initial steps or tasks to be accomplished and continuing until all proposed tasks are fully described and the RFP objectives are accomplished. Include a **time schedule** for completion of your firm’s implementation plan and an estimate of time commitments from City staff. **Timeline shall be used in the evaluation.**
- D. References:** A minimum of three (3) **references** with their names, addresses and telephone numbers that can attest to your experience in projects of similar scope and size.
- E. Fee Proposal:** Provide a complete list of costs using Solicitation Response Form found in Section 7. There is a section for optional pricing if virtual meetings are held in lieu of personal or onsite meetings.
- F. Additional Data (optional):** Provide any additional information that will aid in evaluation of your qualifications with respect to this project, including any alternative ordering and/or inventory management options available.

SECTION 6.0: EVALUATION CRITERIA AND FACTORS

6.1 Evaluation: An evaluation team shall review all responses and select the proposal or proposals that best demonstrate the capability in all aspects to perform the scope of services and possess the integrity and reliability that will ensure good faith performance.

6.2 Intent: Only respondents who meet the qualification criteria will be considered. Therefore, it is imperative that the submitted proposal clearly indicate the firm's ability to provide the services described herein. Evaluation will be done in accordance with the criteria and procedure defined herein. The City reserves the right to reject any and all proposals. The following parameters will be used to evaluate the submittals.

- **Responsiveness of submittal to the RFP**
(Contractor has submitted a proposal that is fully comprehensive, inclusive, and conforms in all respects to the Request for Proposals (RFP) and all of its requirements, including all forms and substance.)
- **Fees**
(Contractor has submitted prices in a clear manner and addresses each line item accordingly.)
- **Understanding of the project and the objectives**
(Contractor's ability to demonstrate a thorough understanding of the City's goals pertaining to this specific project.)
- **Experience**
(Firm's proven proficiency in the successful completion of similar projects.)
- **Necessary Resources/Capability**
(Firm has provided sufficient information proving their available means to perform the required scope of work/service; to include appropriate bonding, insurance and all other requirements necessary to complete the project.)
- **Strategy & Implementation Plan**
(Firm has provided a clear interpretation of the City's objectives in regard to the project, and a fully comprehensive plan to achieve successful completion. See Section 5.0 Item C. – Strategy and Implementation Plan for details.)
- **References**
(Proof of performance in projects of similar scope and size from previous clients. See Section 5.0 Item E – References.)

City also reserves the right to take into consideration past performance of previous awards/contracts with the City of any vendor, contractor, supplier, or service provider in determining final award(s). The City will undertake negotiations with the top rated firm and will not negotiate with lower rated firms unless negotiations with higher rated firms have been unsuccessful and terminated.

6.3 Oral Interviews: The City may invite the most qualified rated proposers to participate in oral interviews.

6.4 Award: Firms shall be ranked or disqualified based on the criteria listed in Section 6.2. The City reserves the right to consider all of the information submitted and/or oral presentations, if required, in selecting the project Contractor.

SECTION 7.0: SOLICITATION RESPONSE FORM

Offeror must submit entire Form completed, dated and signed.

**This Proposal will be opened publicly in a virtual meeting:
Please join Strategic Planning Consultant RFP-4891-21-SH on GoToConnect
from your computer using the Chrome browser.
<https://my.jive.com/meet/441981573>**

**You can also dial in using your phone.
US: (646) 749-3129**

**Access Code: 441-981-573
Audio PIN 1**

Description	Onsite/Personal Meetings	Virtual Meeting Option
Phase 1		
Phase 2		
Final Report		
Grand Total		

Grand Total Written for Onsite/Personal Meetings: _____ dollars

Grand Total Written for Virtual Meeting Option: _____ dollars

Anticipated delivery of Final Report _____

The City reserves the right to accept any portion of the work to be performed at its discretion

The undersigned has thoroughly examined the entire Request for Proposals and therefore submits the proposal and schedule of fees and services attached hereto.

This offer is firm and irrevocable for sixty (60) days after the time and date set for receipt of proposals.

The undersigned Offeror agrees to provide services and products in accordance with the terms and conditions contained in this Request for Proposal and as described in the Offeror's proposal attached hereto; as accepted by the City.

Prices in the proposal have not knowingly been disclosed with another provider and will not be prior to award.

- Prices in this proposal have been arrived at independently, without consultation, communication or agreement for the purpose of restricting competition.
- No attempt has been made nor will be to induce any other person or firm to submit a proposal for the purpose of restricting competition.
- The individual signing this proposal certifies that he/she is a legal agent of the offeror, authorized to represent the offeror and is legally responsible for the offer with regard to supporting documentation and prices provided.
- Direct purchases by the City are tax exempt from Colorado Sales or Use Tax. Tax exempt No. 98-903544. The undersigned certifies that no Federal, State, County or Municipal tax will be added to the above quoted prices.
- Prompt payment discount of _____ percent of the net dollar will be offered to the City if the invoice is paid within _____ days after the receipt of the invoice. Payment Terms _____.

RECEIPT OF ADDENDA: the undersigned Contractor acknowledges receipt of Addenda to the Solicitation, Specifications, and other Contract Documents.

State number of Addenda received: _____.

It is the responsibility of the Bidder to ensure all Addenda have been received and acknowledged.

Company Name – (Typed or Printed)

Authorized Agent – (Typed or Printed)

Authorized Agent Signature

Title

Address of Offeror

City, State, and Zip Code

Phone Number

Email



Purchasing Division

ADDENDUM NO. 1

DATE: March 16, 2021
FROM: City of Grand Junction Purchasing Division
TO: All Interested Parties
RE: Strategic Planning Consultant RFP-4891-21-SH

Bidders responding to the above referenced solicitation are hereby instructed that the requirements have been clarified, modified, superseded and supplemented as to this date as hereinafter described.

Please make note of the following:

Question 1. Is there a budget or not-to-exceed price for the project?

Answer: There is a budget, but it will not be shared at this time.

Question 2. Is the "matrix" described in Phase 2 an already-existing document, or this a document we produce from Phase 1?

Answer: The matrix is associated with the recently adopted Comprehensive Plan and is in review by City Council.

Question 3. Did the City have a consultant create your strategic plan for 2019, and, if so, who was it?

Answer: Yes, it was Tanner LLC.

Question 4. Have you hired consultants to create your strategic plan in years prior to 2019? If so, who was it?

Answer: Yes, in 2017. It was Tanner LLC.

Question 5. What level of ownership has the City Council had in the existing strategic plan? Were they highly engaged in its development, and do they routinely participate in monitoring progress?

Answer: The strategic plan is an expression of the priorities of City Council.

Question 6. Has the City evaluated the effectiveness of its previous strategic planning process, as well as the implementation effort? If so, what improvements is the City hoping to make during the upcoming planning cycle?

Answer: The City has evaluated the effectiveness of the strategic planning process and the process outlines in this cycle reflects those suggested changes.

Question 7. Does the City wish to engage the community and external stakeholders in Phase 1 of the project with the goal of informing the Council's planning effort? Or, is it the City's intent to have the consulting team leverage stakeholder and community input from the development of One Grand Junction, the City's comprehensive plan? If the City does wish to engage the community as part of Phase 1, can you provide a list of groups and individuals expected to be involved in the effort?

Answer: No external stakeholders are involved. The scope of this project is solely with City Council and staff.

Question 8. Does the City expect all of the work to be conducted virtually or is there an expectation that facilitated sessions with the City Council and with executive leadership to be conducted in-person? If there is an expectation of on-site work, please describe when and where that work is requested.

Answer: This is yet to be decided based on public health recommendations.

Question 9. Does the City have a budget for this project? If so, can the City please share the amount budgeted?

Answer: Please see Question 1.

Question 10. To what extent will County staff and resources be available to help support the consulting team in the scheduling of any required stakeholder engagement activities?

Answer: *City* staff will be available as necessary.

Question 11. Could you please identify the contract amounts for the strategic plans awarded in 2017 and 2019?

Answer: In 2017 the City spent \$11,820 and in 2019 \$9,556.75.

Question 12. When is the pre-proposal conference and what time is it scheduled for?

Answer: There is no pre-proposal conference.

Question 13. When was the last City Comprehensive Plan completed? Can a copy be provided for us?

Answer: The latest Comprehensive Plan was completed in 2020. It can be found on the City's website at <https://www.gjcity.org/359/Long-Range-Planning>.

Question 14. Is there are Steering Committee proposed for this engagement?

Answer: No.

Question 15. Is there a project completion timeline for the Strategic Plan? Start and End dates and estimated tenure?

Answer: Please see Section 4.3 and 4.4 of the original RFP document.

Question 16. Is there a budget allocated for this portion of the project?

Answer: Please see Question 1.

Question 17. If needed, can meetings be conducted virtually?

Answer: Please see Question 8.

Question 18. Is there a page limit to the proposal response?

Answer: No. However, the City would appreciate a reasonable amount and is not expecting anything excessive.

Question 19. On page six, the RFP states that a minimum standard for a responsible prospective offeror is "have satisfactory record of integrity and ethics." Are you looking for specific documentation or outlined examples of this?

Answer: The requirements for submittal are found in Section 5.0. This particular information would be addressed in Item 5.B.

Question 20. Council “high-level goals and priorities” are highlighted on page 15 of the RFP as something consultant meetings should establish. Are there existing priorities that you wish to remain at the forefront of this conversation?

Answer: High-level goals and priorities shall be established through this process.

Question 21. Is there a budget already allocated to this project?

Answer: Please see Question 1.

Question 22. One of the final deliverables for the scope of services is an implementation matrix. Will the firm developing this plan be considered for implementation?

Answer: The awarded Consultant will be developing a final Implementation Matrix as one of the two final products outlined in Section 4.1.2.4. So, yes, the firm developing the Strategic Plan will be the same firm who develops the implementation matrix.

Question 23. It appears the City completed a strategic plan in 2019. How well did it go and what about the plan and process does the City want to repeat and/or do differently?

Answer: The City found the previous Strategic Plan to be completely satisfactory.

Question 24. Who was involved within the City in lead roles and are they participating again?

Answer: The Consultant, City Council and City staff were involved, and those roles will be involved again.

Question 25. Did the City use external help the last time? If yes, what advantage, if any, would such a vendor have in competing for the current work?

Answer: If you mean by “external help” a contracted Consultant, yes. All vendors are welcome to participate in the solicitation process and all will be evaluated based on the information contained in the RFP document.

Question 26. There is benefit and challenge in enlisting external input into public sector Municipal Strategic Planning. What entities/groups do you want to participate in this process – community stakeholder groups, citizens, other government entities, etc.?

Answer: The scope of this project is solely with City Council and staff.

Question 27. What are possible challenges to the successful and/or speedy work on this Strategic Plan at the City?

Answer: The City expects the awarded Consultant to determine this information and help address it in the finished product.

Question 28. What is your budget or budget range or how much have you spent on similar work in the past?

Answer: Please see Question 1 and 11.

Question 29. Will answers to questions from all potential vendors be shared among us?

Answer. Yes. Please see Sections 1.10, 4.4 and 7.0 of the original RFP document.

Question 30. Section 4.2 indicates that Council interviews should be done within 2 weeks of the April 6 election and that the three Council positions not up for reelection could be interviewed prior to April 6. However, Section 4.4 anticipates contract execution on April 12. Does that mean the expectation is the interviews are conducted between April 12 and April 20?

Answer: The Tentative Time Schedule in Section 4.4 was revised several times during the planning phase before the document was posted, and the verbiage was overlooked. The intent is to have the meetings scheduled as soon as possible.

Question 31. Is there a budget range for this project?

Answer. Please see Question 1 and 11.

Question 32. Is there a dollar amount the City is anticipating spending and/or has reserved in the 2021 Budget for this project? How much did the 2019 Strategic Plan cost?

Answer: Please see Question 1 and 11.

Question 33. How detailed would you like the cost proposal? The form you've requested at the end of the RFP has only lump-sums for Phase I and II with both an in-person and virtual options, but would you also like something attached that outlines each step of each phase and related costs? (i.e. 4.1.1.1 – Review the City's Comprehensive Plan – Related Cost; 4.1.1.2-Meet individually with each Council member-Related Cost)

Answer: Please provide the related cost for each phase as noted in Section 7.

Question 34: The City utilized a facilitator to complete the 2019 Plan. Is there a reason The City is looking to use a Strategic Planning Consultant instead of using a facilitator to create the 2021 Strategic Plan?

Answer: The City used a Strategic Planning Consultant in 2019.

Question 35: Was the City happy with the team of Houseal Lavigne, Williford, and JR Engineering who did the 2020 Comprehensive Plan and the work product they produced? Is the City likely to select different team, assuming they submit a proposal?

Answer: This specific project, RFP-4891-21-SH, is to select a Consultant to help produce a Strategic Plan for City Council and staff. All proposals submitted will be considered.

Question 36: Who is likely to be on the selection committee for this project?

Answer: Individuals from different departments will comprise the evaluation committee.

Question 37: Can the City elaborate further on the timeline regarding the two phases? Are there any key milestones of note beyond the Council interviews?

Answer: The milestones are all found in Section 4 of the RFP document.

Question 38: Please provide the percentage (%) for weighing the evaluation factors (e.g. 20% for experience, 40% for understanding project objectives, etc).

Answer: There are no weights or percentages.

Question 39: Is there a designated budget for this opportunity?

Answer: Please see Question 1.

Question 40: What other city councils does the City of Grand Junction look to as they admire across CO or elsewhere?

Answer: There is no response to this question.

Question 41: Can a copy of the full current strategic plan be shared prior to award?

Answer: The current plan is available on the City's website:

<https://www.gjcity.org/DocumentCenter/View/469/2019-Grand-Junction-Strategic-Plan-PDF>

Question 42: Who was awarded the contract in 2019?

Answer: Please see Question 3.

Question 43: Can we have a copy of the contract?

Answer: A sample contract is included at the end of this Addendum document.

Question 44: Can we get a copy of the implementation plan matrix?

Answer: Please see Question 2. Once finalized, a copy will become available.

Question 45: How was progress of the last plan tracked and reported to city council? Can you share any tracking or reporting documents?

Answer: Progress is tracked internally by staff.

Question 46: How were the final results of the last plan reported to city council?

Answer: Final results are presented by staff to Council in memo format.

Question 47: Who is on the proposal review panel?

Answer: Please see Question 36.

Question 48: How will you make the decision to do interviews or not?

Answer: Firms will be ranked using the criteria listed in Section 6.2. A short list will be developed using that criteria. Interviews may or may not be needed based on the number of firms on the short list.

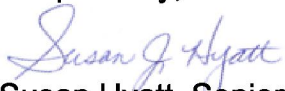
Question 49: If you hold interviews, who will be on the interview panel?

Answer: Please see Question 36.

The original solicitation for the project referenced above is amended as noted.

All other conditions of subject remain the same.

Respectfully,



Susan Hyatt, Senior Buyer
City of Grand Junction, Colorado

SAMPLE CONTRACT



CITY OF GRAND JUNCTION, COLORADO

CONTRACT

This CONTRACT made and entered into this **XXX** day of **XXXXXXXX** by and between the **City of Grand Junction, Colorado**, a government entity in the County of Mesa, State of Colorado, hereinafter in the Contract Documents referred to as the "Owner" and **XXXXXX** hereinafter in the Contract Documents referred to as the "Contractor."

WITNESSETH:

WHEREAS, the Owner advertised that sealed Responses would be received for furnishing all labor, tools, supplies, equipment, materials, and everything necessary and required for the Project described by the Contract Documents and known as **XXXXXX**

WHEREAS, the Contract has been awarded to the above named Contractor by the Owner, and said Contractor is now ready, willing and able to perform the Services specified in accordance with the Contract Documents;

NOW, THEREFORE, in consideration of the compensation to be paid the Contractor, the mutual covenants hereinafter set forth and subject to the terms hereinafter stated, it is mutually covenanted and agreed as follows:

ARTICLE 1

Contract Documents: It is agreed by the parties hereto that the following list of documents which are attached hereto, bound herewith, or incorporated herein by reference constitute and shall be referred to either as the "Contract Documents" or the "Contract", and all of said documents taken together as a whole constitute the Contract between the parties hereto, and they are fully a part of this agreement as if they were set out verbatim and in full herein:

The order of contract document governance shall be as follows:

- a. The body of this contract agreement
- b. Negotiated Terms and Conditions/Scope of Services etc.;
- c. Solicitation Documents for the Project; **XXXXXX**;
- d. Contractors Response to the Solicitation
- e. Service Change Requests;
- f. Field Orders, if any;
- g. Change Orders, if needed.

ARTICLE 2

Definitions: The clauses provided in the Solicitation apply to the terms used in the Contract and all the Contract Documents.

ARTICLE 3

Contract Services: The Contractor agrees to furnish all labor, tools, supplies, equipment, materials, and all that is necessary and required to complete the tasks associated with the Services described, set forth, shown, and included in the Contract Documents as indicated in the Solicitation Document.

ARTICLE 4

Contract Time: Time is of the essence with respect to this Contract. The Contractor hereby agrees to commence Services under the Contract on or before the date specified in the Solicitation from the Owner, and to achieve Final Completion of the Services no later than **XXXXXX**.

ARTICLE 5

Contract Price and Payment Procedures: The Contractor shall accept as full and complete compensation for the performance and completion of all of the Services specified in the Contract Documents, the Not to Exceed Amount of **XXXXXXXXXX**. If this Contract contains unit price pay items, the Contract Price shall be adjusted in accordance with the actual quantities of items completed and accepted by the Owner at the unit prices quoted in the Solicitation Response. The amount of the Contract Price is and has heretofore been appropriated by the Grand Junction City Council for the use and benefit of this Project. The Contract Price shall not be modified except by Change Order or other written directive of the Owner. The Owner shall not issue a Change Order or other written directive which requires additional services to be performed, which services causes the aggregate amount payable under this Contract to exceed the amount appropriated for this Project, unless and until the Owner provides Contractor written assurance that lawful appropriations to cover the costs of the additional services have been made.

Unless otherwise provided in the Solicitation, monthly partial payments shall be made as the Services progress. Applications for partial and Final Payment shall be prepared by the Contractor and approved by the Owner in accordance with the Solicitation.

ARTICLE 6

Contract Binding: The Owner and the Contractor each binds itself, its partners, successors, assigns and legal representatives to the other party hereto in respect to all covenants, agreements and obligations contained in the Contract Documents. The Contract Documents constitute the entire agreement between the Owner and Contractor and may only be altered, amended or repealed by a duly executed written instrument. Neither the Owner nor the Contractor shall, without the prior written consent of the other, assign or sublet in whole or in part its interest under any of the Contract Documents and specifically, the Contractor shall not assign any moneys due or to become due without the prior written consent of the Owner.

ARTICLE 7

Severability: If any part, portion or provision of the Contract shall be found or declared null, void or unenforceable for any reason whatsoever by any court of competent jurisdiction or any governmental agency having the authority thereover, only such part, portion or provision shall be effected thereby and all other parts, portions and provisions of the Contract shall remain in full force and effect.

IN WITNESS WHEREOF, City of Grand Junction, Colorado, has caused this Contract to be subscribed and sealed and attested in its behalf; and the Contractor has signed this Contract the day and the year first mentioned herein.

The Contract is executed in two counterparts.

CITY OF GRAND JUNCTION, COLORADO

By: _____
XXXXXXXXXX

_____ Date

XXXXXXXXXX

By: _____
XXXXXXXXXX

_____ Date



March 22, 2021

Susan Hyatt
Senior Buyer
City of Grand Junction
susanh@gjcity.org

Via Rocky Mountain Bid Net portal only

**Response to Request for Proposal: Strategic Planning Consultant
RFP-4891-21-SH**

Dear Ms. Hyatt;

SBrand Solutions is pleased to present our qualifications to be the strategic planning partner for the City of Grand Junction. SBrand is uniquely qualified for this project based on our background and expertise as facilitators and strategic planners paired with our specific experience working with and for Colorado local governments. Sheryl Trent, owner of SBrand Solutions, is one of fewer than forty Certified Master Facilitators™ in the world. She and her team will collaborate with City leadership to deliver a process that will result in a visionary strategic plan that aligns Grand Junction's Comprehensive Plan with Council goals and priorities.

Our team has vast experience working with a wide variety of clients, including diverse communities across the country. We use a proven methodology that is customized for Grand Junction's needs and vision, and our approach as your strategic partner results in a creative strategic framework and implementation plan that will move your community forward.

We understand that strategic planning begins with listening to your Councilmembers and executive staff and shaping the feedback into a shared, achievable vision. Through skillful facilitation and the application of concepts necessary for high-functioning organizations, SBrand solutions will guide the City of Grand Junction on a path toward successful governance that will leave lasting impact even beyond the two years of the strategic plan.

SBrand Solutions offers the credentials to inspire confidence in your City leadership, especially during this unusual time of ongoing public health concerns. I am a Certified Virtual Facilitator™ and I and my team have facilitated virtual meetings with small teams as well as community meetings with more than 100 participants. I am also certified by Cornell University in Diversity and Inclusion and bring that expertise and approach to the planning process. We have created dozens of strategic plans for cities



in Colorado and across the country and have extensive experience as employees of local government. We are specifically familiar with the City of Grand Junction. I also worked for the City of Grand Junction several years ago and lived in the Redlands, so I am very familiar with the Western Slope and Grand Junction in particular.

Team member and co-facilitator Mitzi Rapkin also has extensive experience both as an employee of local government and as a certified facilitator. I will personally lead and oversee the process bringing more than 28 years of employment and consultant work facilitating strategic planning for local governments. Our ability to listen, to be flexible if things change, and to bring a strategic mindset to the process will result in a plan that is both visionary, achievable, and measurable.

We have received and acknowledge Addendum #1 to this RFP. This is a binding offer. We have attached three strategic plans we have created for our clients in the past year for your review. 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. We look forward to hearing from you and are very excited about the prospect of working with you and your team!

 Sincerely,

Sheryl Trent, Owner Certified Master Facilitator® Certified Virtual Facilitator™
SBrand Solutions, LLC
2874 Blue Leaf Drive
Fort Collins, Colorado 80526
sheryl@sbrandsolutions.com
970.208.6633
www.sbrandsolutions.com





Executive Summary

SBrand has a unique perspective on creating your strategic plan, and a proven methodology to facilitate input and engagement with your Council and leadership staff. Coupled with our expertise in creating strategic plans, we bring an unmatched and expert level of skill to our work. Our plans are not created by us, sitting in our offices in a vacuum – they are created in a collaborative partnership with you and your team via a process that is both adaptable and rigorous to get you the results you need.

Our recommended methodology includes two main phases, and four on site visits with virtual options if needed :

1. **Kickoff: Design a customized approach built on your specific needs and direction;**
2. **Phases 1 and 2: Review documents, including the Comprehensive Plan, the budget, other plans, and document as directed;**
3. **Phases 1 and 2: Engage your Council and executive staff by gathering information through personal interviews and facilitated workshops; and**
4. **Final Documents: Create sustainable, actionable, and realistic long-term results through a written strategic plan and implementation documents.**

We will use existing touchstones and best practices to build a sustainable future moving forward. The **Strategic Plan** will recognize the successes and accomplishments of the past while focusing on the future of a high performing organization. The **Implementation Matrix** will have realistic action steps tied to Council goals and priorities.

The facilitated meetings are the **heart** of the process and will be the foundation for the components of your strategic plan. Our proposal outlines a series of three facilitated meetings over the course of the project. These meetings can be facilitated virtually with any combination of live “webinars”, prerecorded information, online whiteboards, and PowerPoints. The meetings are designed to build understanding, cultivate a safe environment where all voices are heard, create support for the goals and priorities, and result in consensus-based agreement about future actions and milestones.

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, specifically local governments.



Based on our proven approach and ability to facilitate the creation of an understandable and realistic strategic plan, you will have all the tools for a successful future. We appreciate the opportunity to share more about our methodology and our team with you. Thank you for your time.

Qualifications, Experience and Expertise



Sheryl Trent, Certified Master Facilitator® and Certified Virtual Facilitator™

Sheryl has served in city and county government as the Town Manager, Assistant County Manager, Economic Development Director, Community Development Director and Urban Renewal Authority Executive Director. She has worked for local governments in Washington, California and most recently Colorado.

As well as 28 years of local government experience, she is one of fewer than 45 Certified Master Facilitators™ in the world and is a Certified Virtual Facilitator™. She also holds a certification from Cornell University in Diversity, Equity, and Inclusion. Her real-life experience includes managing strategic plans, comprehensive plans, multimillion-dollar capital projects, economic development agencies, and Urban Renewal Authorities; and in combination with her nonprofit board service her 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 facilitated 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 a regular speaker and contributor to various platforms on facilitation and inclusion.



Mitzi Rapkin, Certified Facilitator

Mitzi has more than 30 years of experience as a journalist, interviewer, and writer and more than 12 years working in local government communications. She is an MG Rush Certified Structured Facilitator and is certified in Foundations in Public Participation by the International Association for Public Participation. She is the owner of Full Light Communications LLC, based in Basalt, Colorado. Mitzi is also the founder, host and producer of the podcast *First Draft: A Dialogue on Writing*, which is distributed in partnership with *Literary Hub*. She has interviewed more than 300 world class authors and discusses issues of craft, empathy, and the human condition on her weekly show. Throughout her career her focus has been on opening the world up to people in new ways through dialogue, conversation, interviews, writing, creativity, and connection to the natural world.

Why SBrand Solutions?

Formed in 2011 by Sheryl Trent, SBrand Solutions has a unique expertise in working with local government clients to solve problems and “fill in the blanks”. As a professional facilitation firm, we 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 and Stakeholder Engagement**

This is what makes us different: We listen, we respond, and we craft. We listen to what you say. We respond to your goals and aspirations by tailoring the final product as a reflection of your feedback. And we craft the plan with your input as the base, the community as the beneficiary, and the measurable results as the movement forward. Our method is proven to work as dozens of clients who have used our services have forged successful paths forward achieving focused results as organizations and with their communities. We have a unique perspective on creating strategic plans and every meeting we design is results focused. Our iterative process is driven by our expert professional facilitation that then drives strategies that are effective and comprehensive.



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

Similar Projects and Work

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

- Cities and counties across the United States
- Non-profits (community foundations, partnerships, museums, educational, human rights)
- Federal and state government divisions and departments
- National transportation associations
- Quasi-governmental organizations and special districts
- Public works, human services, housing, and human resources departments
- Economic development organizations and Main Streets

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

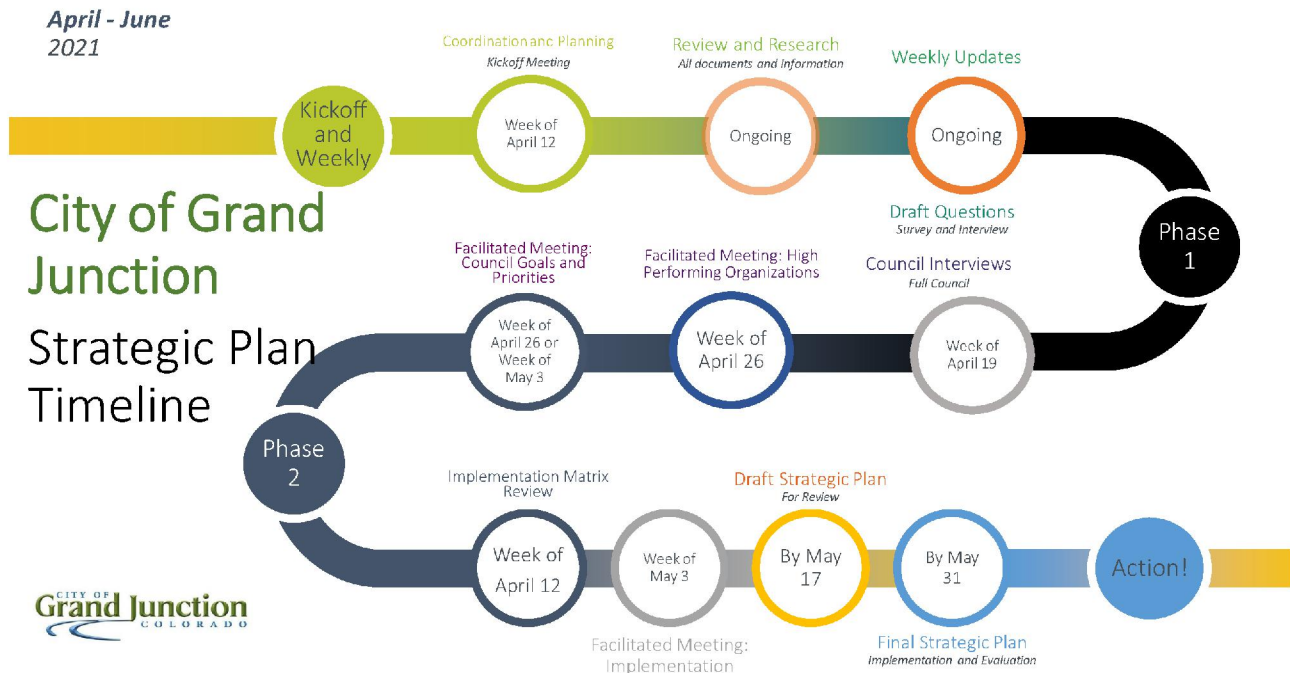
Work Plan

Project Understanding

We understand the purpose of the project is to provide the facilitation and creation of a two-year Strategic Plan and Implementation Matrix for the City Council of the City of Grand Junction. The work will be approached through the lens of a thorough review of the Comprehensive Plan and other documents as needed such as the existing Strategic Plan, personal interviews with the City Council, and three facilitated workshops.

The process and framework we will design is unique to your agency and based on extensive conversations during the kickoff meeting and throughout the timeframe. All our work includes consistent communication, facilitated meetings that are based on

consensus and teamwork, follow-up documentation and reporting for clear messaging, a community/stakeholder engagement process, and a written plan that creates sustainable outcomes through implementation and measurements.



Big Picture Timeline

Please see specific timeline details and tasks in the attached spreadsheet. We believe there are three key inputs to our methodology: the people, the preparation, and the product.

People

We understand that the core group will be the City Council who will be creating expectations for a high performing organization, high level goals, and Council priorities. The City Manager and City Attorney will participate, and the executive team will assist in the creation of a final Implementation Matrix that will achieve the Council Goals and Priorities. These people are identified as primary stakeholders and will provide the foundational input for the plan’s ideology and basic framework.

Preparation

Preparation for the conversations and the facilitated meetings is the second 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 design questions for the Council interviews that are reflective of what has been achieved and also probing to garner from each member their aspirations and tangible ideas. This personalized approach allows for authentic connection and deep listening which coalesce to formulate the foundation for the outcomes.

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

- 1) Full, comfortable, and enthusiastic input and engagement from all participants.
- 2) Relationship building, clear communication, and shared understanding.
- 3) Support for the ideas and buy in for the implementation of the Plan.
- 4) The outcomes and products (relationships and deliverables) that your team wants and needs.

Strategic Planning Process

Our unique process involves 5 steps customized to each client

1	<p>Perspective and Trends</p> <p>We cover the history and background of economic development, including Mission, Vision, and Values. An in-depth discussion about turning point and agreement on definitions lays the foundation for forward momentum and success.</p>
2	<p>Brainstorming and Focus</p> <p>The 4 Critical Questions and 3 Vision Questions cover "Where are we now?" and "Where are we going?" so that the stakeholders can create a Long List of Opportunities and Challenges.</p>
3	<p>GPS (Goals, Projects and Strategies)</p> <p>This is the heart of the Plan. From the Long List we establish Core Priorities and our future direction. Goals: (The <u>Why</u>), Projects: (The <u>What</u>) and Strategies: (The <u>How</u>). SWOT and SMART are both applied during this step.</p>
4	<p>Measurable Actions</p> <p>No amount of planning is valuable without actions. We recommend 90 Day Actions that are led by goals, guided by strategy, and that accomplish projects. Focus and Accountability are driven by a Leader and Team for the action, a Completion Date, and a Measurement/Evaluation.</p>
5	<p>Celebrate, Evaluate and Report</p> <p>Finally, Celebrate Success! This step encourages a thoughtful and thorough review of the Action Plan every 90 days. The group reviews Lessons Learned, identifies Trends or New Issues, determines Next Steps, and Reports Out on accomplishments.</p>

Product

The final product is a two-year Strategic Plan with and Implementation Matrix. The Plan will focus on the Council Goals and Priorities and will also refresh (if needed) the Guiding Principles, Strategic Directives, Key Initiatives, and Success Metrics.

You can view some examples of the plans we create on our website 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 the engagement process can create many other "products".

Our methodology is designed to produce outcomes that result in:

- ✓ **Teamwork**
- ✓ **Trust and respect**

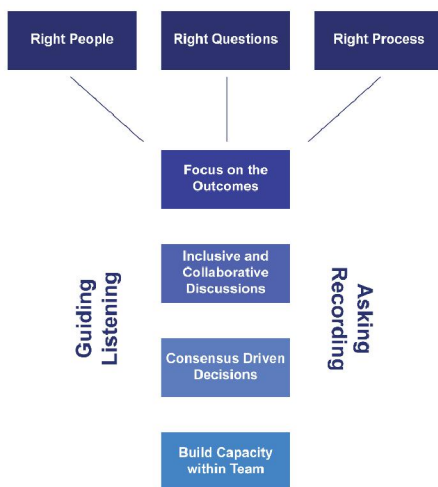
- ✓ **Understanding of the needs and long-term challenges**
- ✓ **Buy in and support of the Vision for the future**
- ✓ **Champions for the Action moving forward**

The people and the facilitation process build the foundation that will lead to the **successful outcome**: long-term sustainability for your organization, achievable ways to attain greater excellence, strategies to readily meet goals, and higher levels of service for your community.

Start: Kickoff Meetings and Calls

The kickoff meeting to cover logistics, and our weekly updates, 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. The kickoff meeting can be virtual, but we prefer an in-person kickoff to establish personal relationships and a deeper understanding. Note: We recommend a weekly check-in video conference throughout the process and all phone calls and emails throughout the life of the project are included at no charge in our proposal.

APPROACH TO FACILITATION



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. As a result, the cost savings from a virtual meeting comes from the lack of travel. 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.



Phase 1: Review Documents, Conduct Interviews, Facilitate Workshops

In this phase – which stretches through Phase Three – we will conduct research on the current policies and documents with a focus on the Comprehensive Plan and current Strategic Plan. Other documents might also be important for our review.

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

Key Tasks of this Phase will include:

- 1.1 Conduct review of documents
- 1.2 Hold personal interviews with Councilmembers
- 1.3 Identify alignment, common themes, and areas of focus
- 1.4 Facilitate a workshop to establish expectations for high performing organizations
- 1.5 Facilitate a workshop to establish high level goals and priorities for the Council

In Person Interviews

In person (or virtual as required) interviews – We will personally interview the seven (7) Councilmembers which will offer insight and feedback that creates the foundation for important parts of the long-range plan including Goals and Priorities. In addition, it can help identify alignment with the Comprehensive Plan and other important ideas to help us plan a process that leads to success and consensus.

Facilitated Meetings

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.

Phase 2: Review Documents, Facilitate Workshop, Create Strategic Plan, and Implementation Plan

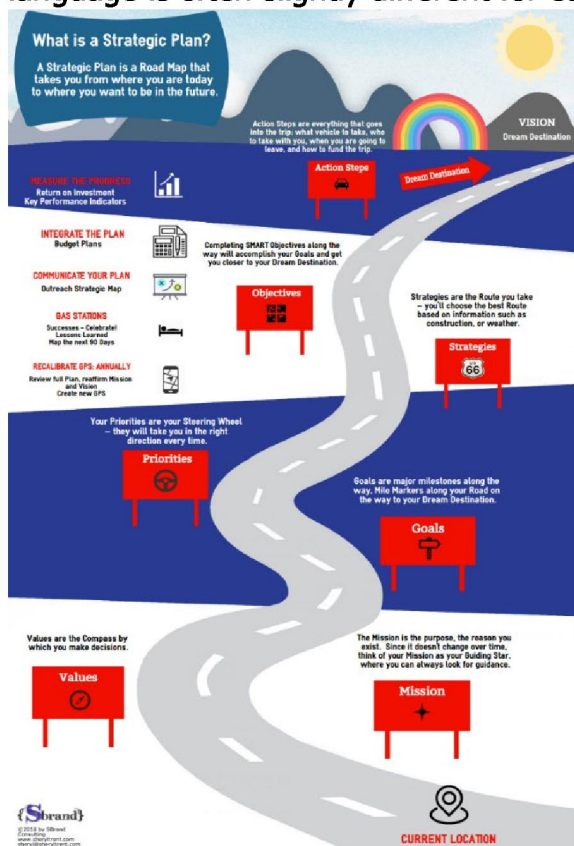
Key Tasks of this Phase will include:

- 2.1 Review the Implementation Matrix considering Phase One information and meetings
- 2.2 Identify areas of non-alignment with the Council Goals and Priorities

- 2.3 Facilitate a workshop with the executive leadership team to develop strategies and refine the Matrix
- 2.4 Create a draft Strategic Plan
- 2.5 Create a draft Implementation Matrix that includes strategies, resources, partners, leads, and due dates
- 2.6 Facilitate a review of the draft documents
- 2.7 Create the final Strategic Plan and Implementation Matrix

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

You can view several examples of the Strategic Plans that we create with our clients at www.sbrandsolutions.com.

The *Implementation Matrix* will be the actionable, realistic, “rubber meeting the road” part of the process and will include roles, responsibilities, and resources. While the Councilmembers are instrumental in guiding the bigger picture, the staff – the people responsible for doing most of the work to accomplish the Goals and Initiatives – will be involved.



Reports and Information

The reports, photos, and documents created 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, or given to the Council and staff for updates. Anyone who could not attend a meeting can stay up to date on the plan and the process.

Final Step: Ongoing Implementation

As a best practice, we recommend that you adopt an ongoing process for reviewing and updating the action steps included in the plan. We have included a recommendation in our proposal 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.

Deliverables

- Comprehensive Two-Year Strategic Plan with all elements
- Realistic and measurable Implementation Matrix
- Recommendations for measures to administer the plan including a process for engagement and communication
- Reports and documentation from all facilitated meetings
- 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) city governments we are confident that we can partner with you to create a process that creates the customized approach needed for your Strategic Plan.



References

Gayle Langley

Main Street Coordinator
Colorado Department of Local Affairs
1313 Sherman Street, Room 521
Denver, Colorado 80203
Gayle.langley@state.co.us
(303) 864-7728

Josh Rydell

City Commissioner
City of Coconut Creek, Florida
4800 West Copans Road
Coconut Creek, Florida 33063
jrydell@coconutcreek.net
(954) 973-6760

Shane Hale

Town Manager
Town of Windsor
301 Walnut Street
Windsor, Colorado 80550
shale@windsorgov.com
970-674-2400

Please note we have other district and local government references if needed.

Pricing

Section 7 Attached



Appendices and Additional Data

Sheryl Trent Biography
Sheryl Trent Resume
Mitzi Rapkin Resume
Representative Projects
Community Engagement Examples
Strategic Plan Example

SECTION 7.0: SOLICITATION RESPONSE FORM

Offeror must submit entire Form completed, dated and signed.

**This Proposal will be opened publicly in a virtual meeting:
Please join Strategic Planning Consultant RFP-4891-21-SH on GoToConnect
from your computer using the Chrome browser.
<https://my.jive.com/meet/441981573>**

**You can also dial in using your phone.
US: (646) 749-3129**

**Access Code: 441-981-573
Audio PIN 1**

Description	Onsite/Personal Meetings	Virtual Meeting Option
Phase 1	11,150	9,400
Phase 2	3,000	2,500
Final Report	1,250	1,250
Grand Total	15,400	13,150

Grand Total Written for Onsite/Personal Meetings:

Fifteen thousand four hundred and 00/100 _____ dollars

Grand Total Written for Virtual Meeting Option:

Thirteen thousand one hundred fifty and 00/100 _____ dollars

Anticipated delivery of Final Report By May 31, 2021

The City reserves the right to accept any portion of the work to be performed at its discretion

The undersigned has thoroughly examined the entire Request for Proposals and therefore submits the proposal and schedule of fees and services attached hereto.

This offer is firm and irrevocable for sixty (60) days after the time and date set for receipt of proposals.

The undersigned Offeror agrees to provide services and products in accordance with the terms and conditions contained in this Request for Proposal and as described in the Offeror’s proposal attached hereto; as accepted by the City.

Prices in the proposal have not knowingly been disclosed with another provider and will not be prior to award.

- Prices in this proposal have been arrived at independently, without consultation, communication or agreement for the purpose of restricting competition.
- No attempt has been made nor will be to induce any other person or firm to submit a proposal for the purpose of restricting competition.
- The individual signing this proposal certifies that he/she is a legal agent of the offeror, authorized to represent the offeror and is legally responsible for the offer with regard to supporting documentation and prices provided.
- Direct purchases by the City are tax exempt from Colorado Sales or Use Tax. Tax exempt No. 98-903544. The undersigned certifies that no Federal, State, County or Municipal tax will be added to the above quoted prices.
- Prompt payment discount of 3% percent of the net dollar will be offered to the City if the invoice is paid within 10 calendar days after the receipt of the invoice. Payment Terms 30 days.

RECEIPT OF ADDENDA: the undersigned Contractor acknowledges receipt of Addenda to the Solicitation, Specifications, and other Contract Documents.

State number of Addenda received: 1.

It is the responsibility of the Bidder to ensure all Addenda have been received and acknowledged.

SBrand Solutions

Company Name – (Typed or Printed)

Sheryl Trent Digitally signed by Sheryl Trent
Date: 2021.03.25 10:12:37 -06'00'

Authorized Agent Signature

2874 Blue Leaf Dr

Address of Offeror

970.208.6633

Phone Number

Sheryl Trent

Authorized Agent – (Typed or Printed)

Owner

Title

Fort Collins, CO 80526

City, State, and Zip Code

sheryl@sbrandsolutions.com

Email

City of Grand Junction Strategic Plan

Timelines, Tasks and Deliverables



Tasks	Deliverable	Proposed Dates	Proposed Cost	Proposed Cost
<i>Includes weekly video/phone conference call and all meeting materials.</i>		To be determined by Client	In Person	Virtual
Ongoing Tasks		April - June, 2021		
Kickoff Meeting - 2 hour meeting	Logistics meeting to review framework, process, milestones and deliverables	Week of April 12	\$ 750.00	\$ 500.00
Weekly planning meetings (Zoom) and emails throughout the project	Weekly updates and check ins	Ongoing every Tuesday	Included	Included
Written or video updates as needed to share			Included	Included
	Deliverable		\$ 750.00	\$ 500.00
Phase 1: Review, Identify and Facilitate Vision, Goals and Priorities		April - May, 2021		
1.1 Conduct review of documents, plans, policies and procedures	Focus on Comprehensive Plan, other documents as provided or needed	Week of April 12 and ongoing	Included	Included
1.2 Personal interviews with each Council Member	Seven (7) interviews, one hour+ each	Visit 1 - Week of April 19	\$ 1,400.00	\$ 1,400.00
1.3 Identify alignment, common themes, areas of focus	Based on Comprehensive plan and document review and Council interviews	Week of April 19		
1.4 Facilitate workshop with Council, City Manager and City Attorney - 3 hours	Establish expectations for high performance organization	Visit 2 - Week of April 26	\$ 2,500.00	\$ 2,500.00
1.5 Facilitate workshop with Council and staff - 6 hours	Establish high level goals and Council priorities	Visit 2 or Visit 3 - Week of April 26 or May 3	\$ 5,000.00	\$ 5,000.00
Travel Costs for three (3) onsite visits	Includes all travel costs (hotel, meals, mileage, and travel time)		\$ 1,500.00	\$ -
	Phase 1 Deliverable		\$ 10,400.00	\$ 8,900.00
Phase 2: Facilitate and Create Strategic Plan & Implementation Matrix		April - June, 2021		
2.1 Review the draft Implementation Matrix	Review all documents as needed	Week of April 12	Included	Included
2.2 Identify areas of non alignment with Council high level Goals and Priorities	Identify and recommend approach	Week of April 19	Included	Included
2.3 Facilitation workshop with executive leadership team - 4 hours	Develop strategies and refine the Matrix to align with and clearly achieve the Council identified Goals and Priorities	Visit 4 - Week of May 3	\$ 2,500.00	\$ 2,500.00
2.4 Create a Strategic Plan document with a 2 year view horizon	Create draft and final Strategic Plan	Draft delivered by May 17	\$ 1,000.00	\$ 1,000.00
2.5 Create a draft Implementation Matrix	Includes strategies, resources, partners, leads and timeline	Draft delivered by May 17	Included	Included
2.6 Review of the Draft Document - virtual meeting	For comment and correction	Week of May 17	Included	Included
2.7 Final Strategic Plan and Implementation Plan	For final approval by Council	Final delivered by May 31	\$ 250.00	\$ 250.00
Travel Costs for one (1) onsite visit			\$ 500.00	\$ -

	Phase 2 Deliverable	Document review, facilitated workshop, draft and final Strategic Plan and Implementation Matrix	\$	4,250.00	\$	3,750.00
	Total Proposed Cost for Phase One and Two (includes all travel)		\$	15,400.00	\$	13,150.00
		Note: both in person and virtual meetings include all materials costs				
2.8	Recommended: Consideration of Final Plan for adoption 1 hour - in person meeting	In person presentation and delivery of final documents in a public meeting for adoption by the City Council	\$	750.00	\$	250.00

Additional Recommendations						
Ongoing Support and Implementation			September 2021 - June 2022			
				Included		Included
Monthly conference calls, customized templates	Monthly video conference, written templates, responses to emails and phone calls					
Quarterly Review and Update Meeting - includes overhead	On site	Wednesday, September 1, 2021	\$	2,250.00	\$	1,750.00
Quarterly Review and Update Meeting - includes overhead	On site	January, 2022	\$	2,250.00	\$	1,750.00
Quarterly Review and Update Meeting - includes overhead	On site	April, 2022	\$	2,250.00	\$	1,750.00
Quarterly Review and Update Meeting - includes overhead	On site	June, 2022	\$	2,250.00	\$	1,750.00
Updates to Strategic Plan as needed	In a meeting for consideration	June, 2022	\$	750.00	\$	750.00
	Deliverable	Full Year of Ongoing Support and Implementation Meetings	\$	9,750.00	\$	7,750.00

Education

- BA Political Science, University of Washington
- MPA Public Administration, University of Washington
- Rocky Mountain Leadership Program
- Certified Master Facilitator (tenured)
- Certified Virtual Facilitator
- Certified Life Coach
- Certified by Cornell University in DEI

Professional Affiliations

PAST AND PRESENT

- ICMA Member, Credentialed Manager
- CCCMA Member, Conference Planning
- ICSC Member, Government Relations
- IEDCC Member
- INIFAC Board Member
- Chamber of Commerce Board Member
- Small Business Development Center Board Member
- Leadership Councils
- Rotary President
- Adjunct Faculty, Front Range Community College

Clients

- State Agencies
- Cities and Towns
- Counties
- Special Districts
- Nonprofit Organizations
- Chambers of Commerce
- Economic Development Organizations
- Private Corporations
- Partnership/Membership Organizations
- Foundations



Sheryl Trent

With over 30 years of local government and nonprofit experience, Sheryl Trent is one of fewer than 45 Certified Master Facilitators in the world, is a Certified Virtual Facilitator, and holds a certification from Cornell University in Diversity, Equity and Inclusion. She brings real world experience to her work including managing strategic plans, comprehensive plans, massive capital projects, and economic development agencies. She has served on foundation boards, non profit boards and community service boards, and that combined experience gives her a unique understanding of the needs of her clients. SBrand Solutions was formed to “help fill in the blanks” for local governments, special districts, nonprofits, foundations and other agencies. She and her team of experts travel across the country designing a customized process grounded in proven methodologies to create strategic, sustainable success.

Client Results

- **Consensus Driven Facilitation**
- **Results Based Strategic Planning**
- **Systematic Organizational Assessments**
- **Board and Team Development**
- **Community/Stakeholder Engagement**

Each of our clients is unique and we customize a facilitated process based on confidential conversations, surveys, outreach, research, and best practices. Whether in person or virtual, all of our meetings are engaging, effective and efficient with results that include stronger relationships, better communication, deeper understanding of the issues, strong support for the decisions, and a clear path to success.

{SBrand}

HELPING YOU FILL IN THE BLANKS

Strategic. Sustainable. Success.

Sheryl Trent

(970) 208-6633
sheryl@sbrandsolutions.com
2874 Blue Leaf Drive, Fort Collins, Colorado 80526
www.sbrandsolutions.com

summary of qualifications

- 25+ years of experience in public and non profit sector leadership and management
- A Certified Master Facilitator®, one of fewer than 40 in the world
- Expert at facilitating complex and confrontational topics in a manner that makes them easy to understand and allows consensus to be built
- Customized process and product for each client that builds capacity and enhances shared values
- Proven success and long term results in facilitating strategic planning & team building for clients
- Unique community engagement design and tools
- Experienced virtual facilitator for large and small meetings

professional management and leadership experience

current

OWNER, SBrand Solutions, LLC



prior

**COMMUNITY AND ECONOMIC
DEVELOPMENT DIRECTOR**
City of Evans, Colorado

EXECUTIVE DIRECTOR
Evans Redevelopment Agency

TOWN ADMINISTRATOR
Town of Milliken, Colorado

**COMMUNITY DEVELOPMENT DIRECTOR
(ACTING)/ ECONOMIC DEVELOPMENT
MANAGER**
City of Grand Junction, Colorado

INVESTMENT REPRESENTATIVE
Edward Jones Investments, Yreka, California

**COUNTY ADMINISTRATOR
(ACTING)/ASSISTANT COUNTY ADMINISTRATOR**
County of Siskiyou, Yreka, California

ASSISTANT TO THE CITY ADMINISTRATOR
City of Santa Paula, Santa Paula, California

ASSISTANT TO THE CITY MANAGER/INTERN
City of Federal Way, Federal Way, Washington

past and present

education

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

professional affiliations

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

highlights

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



Learn more at www.sbrandsolutions.com

Strategic. Sustainable. Success.



Mitzi-Jill Rapkin

STRATEGIC COMMUNICATIONS & FACILITATION PROFESSIONAL

MY PHILOSOPHY

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

EXECUTIVE PROFILE

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

CAREER HIGHLIGHTS

- Facilitated visioning process for new leadership team at Colorado Mountain College, Aspen & Carbondale
- COVID-19 crisis communication plan & collateral implemented by cities across USA
- Grew City of Aspen social media, website, & community engagement by quadruple digits during COVID
- Spearheaded partnership during COVID-19 to create valleywide messaging cohesion that is still operating today
- Led rebranding effort for City of Aspen
- Host and produce literary podcast for international audience with 330+ episodes

LEADERSHIP & COMMUNICATIONS

Communications Manager

City of Aspen | 2005-2007 & 2011 - present

Strategic Thinking

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

Fostering Community

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

Execution

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

Accountability

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

Host & Producer

First Draft: A Dialogue on Writing | 2013 - present

- Founded literary podcast with 300 + episodes with prize winning authors from around the world
- Host and produce weekly episodes in partnership with prestigious literary organization called Literary Hub
- Read one book a week and interview author
- Edit and produce 50 episodes a year
- Focus on fiction, non-fiction, poetry, and essays

Reporter / News Director

Aspen Public Radio | 2004-2005 & 2007-2011

- Developed & implemented strategic vision of local news programming
- Hired, supervised, & evaluated three employees
- Managed News Department budget
- Oversaw production of three daily newscasts & special programming
- Developed community partnerships
- Reported breaking, daily, & feature news & hosted talk & morning shows
- Edited reporters & freelance writers
- Maintained records for federal government filings
- Managed news webpages & social media
- Wrote & delivered monthly reports for board of directors

OTHER PROFESSIONAL EXPERIENCE

Filmmaker

Fleisher Films | 2003-2004

- Associate produced film for Animal Planet & Discovery Channel on orphaned black bears in New Hampshire

National Geographic Television | 2001-2003

- Wrote, produced, & edited educational videos on environmental & wildlife topics

Guide, Educator, Naturalist

Backroads | 1994-2000

- Led bicycling & hiking trips nationally & internationally

Visions | 1996

- Led service trips for teenagers to build trails, playgrounds, & daycare centers in Native Alaskan Villages

Alaska Wildland Adventures | 1997

- Guided whitewater rafting & hiking trips & worked as naturalist in Denali National Park & Kenai Peninsula

San Joaquin School District | 1992-1993

- Taught environmental education to sixth grade students Monday through Friday at live-in facility

Aspen Center for Environmental Studies | 1992

- Summer internship focusing on outdoor education, naturalist work, & wildlife rehabilitation

Houston Independent School District | 1991-1992

- Taught environmental education to fifth grade students Monday through Friday at live-in facility
-

SKILLS / ACCOMPLISHMENTS

- IAP2 Trained Public Engagement Specialist
 - MG Rush Trained Structured Facilitator
 - Strong public speaker & excellent communicator
 - Basic film & sound editing
 - Fundraised \$28K+ for personal projects
 - Grant writing experience
 - Spanish communication (college level)
 - Roaring Fork Leadership graduate
 - Emerge Colorado graduate
-

EDUCATION

MFA Creative Writing | 2016

Warren Wilson College

MS Journalism | 2001

Northwestern University - Medill School of Journalism

BA English & Religion | 1990

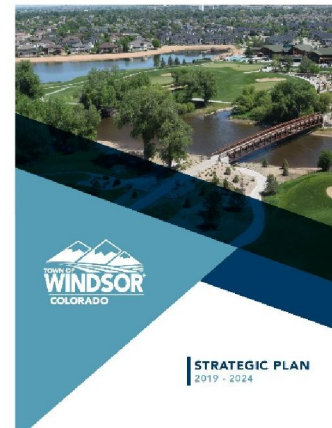
Indiana University



SBrand Solutions Representative Strategic Plan Projects

Town of Windsor Strategic Plan (2018 – Present)

The Town of Windsor asked SBrand Consulting to hold a series of Board and staff retreats to build teamwork and communication and drive a new strategic plan for the future Windsor. With a new Board and a new Manager, Sheryl conducted leadership and organizational assessments to build the base of the plan, which was then submitted for public comment. The plan was then expanded into several departments and dash boarded for a fully integrated implementation tool.



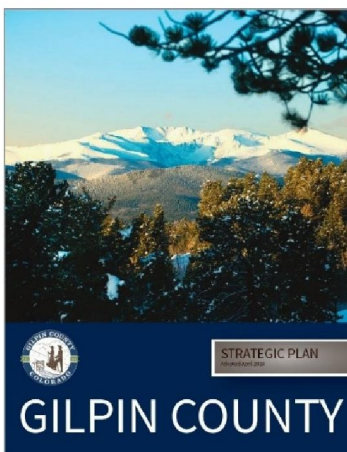
of

City of Coconut Creek, 2019 - Present



The City of Coconut Creek, Florida hired SBrand Solutions to update their Vision2030 Strategic Plan with community visioning sessions, personal interviews, surveys, event engagement, Advisory Group meetings, and significant staff involvement.

Gilpin County Strategic Plan (2019 - present)



The County Board and Manager requested that Sheryl **facilitate a series of teambuilding meetings** (based on Strengthsfinder) **and strategic planning retreats** with stakeholders, partners, staff and elected officials of the County to set a new Vision and Goals for the future of Gilpin County. During the two day retreat a commitment to the Vision and Mission reenergized the team, and Goals, Priorities and Strategies (GPS) were set, with specific Action Steps that created accountability and focus moving forward. Partners and stakeholders came to the table to collaboratively create solutions to long term issues faced by the County.

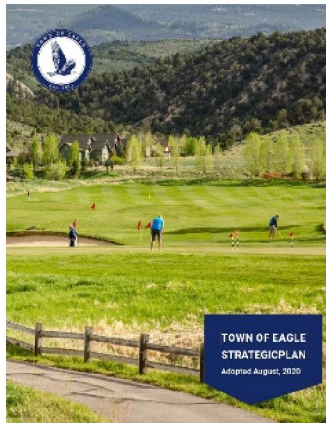


State of Colorado, Department of Local Affairs, Main Street Program (2015 – present)

The State of Colorado has selected SBrand Consulting as one of the preferred contractors to design and conduct facilitated Strategic Plans across the state for Main Street Communities. All Main Street organizations are slightly different: some are nonprofit boards, some are combined with a Chamber, some are part of the Downtown Development Authority and some are committees appointed by the Towns. In that capacity, we have facilitated the creation of over 30 strategic plans.



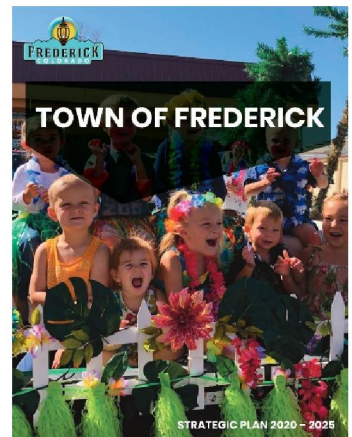
Town of Eagle Retreat and Strategic Plan (2020)



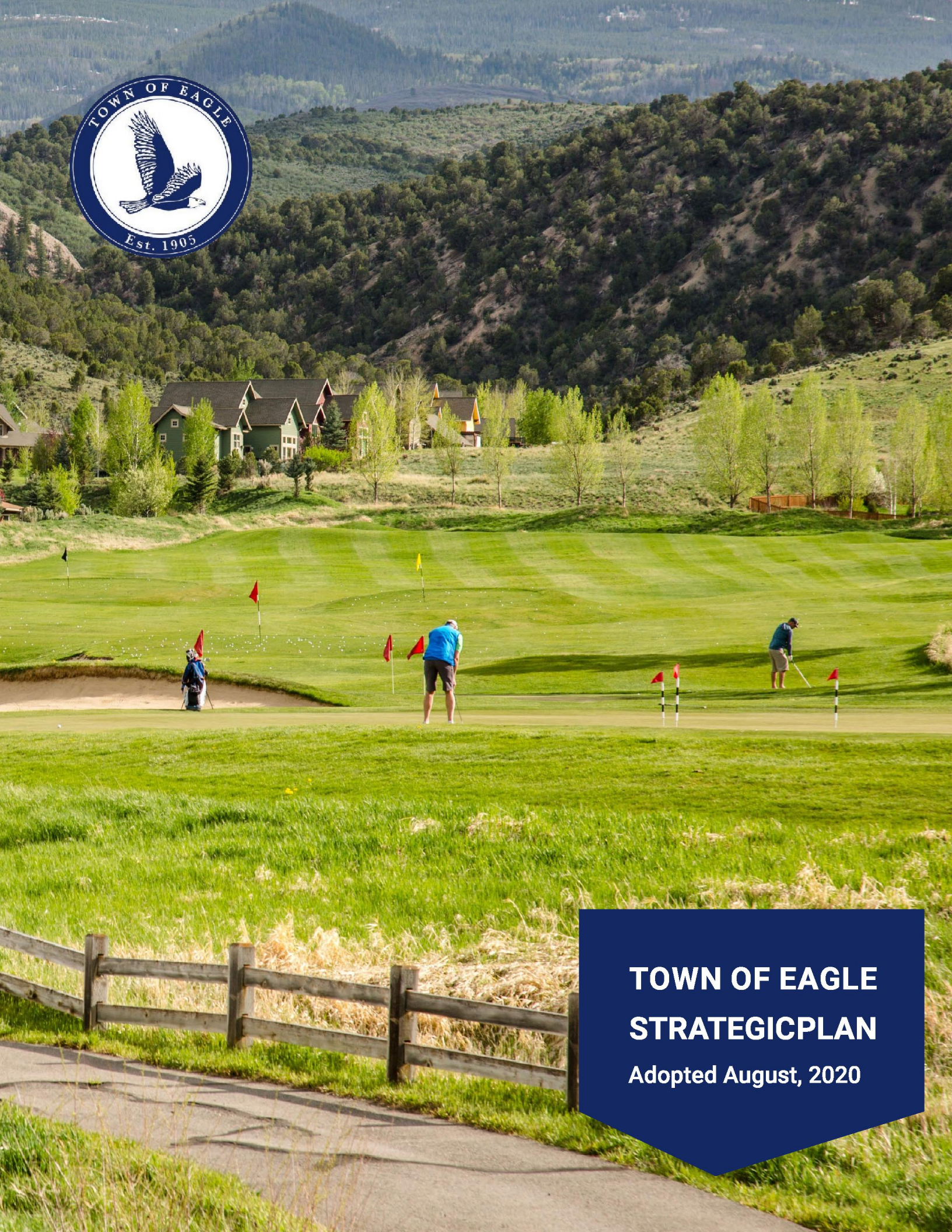
The Mayor and City Council requested that Sheryl **facilitate a Council and staff retreat** to update the Town of Eagle Strategic Business Plan. With newly elected Board members and a new organizational structure, the retreat focused on understanding the framework of the existing strategic plan then updating and refreshing the outcomes, goals, objectives and measurables. The resulting Strategic Plan with Goals, Objectives and Action steps tells the story of the future of Eagle.

Town of Frederick Board and Staff Retreat and Strategic Plan (2020)

The Town of Frederick brought Sheryl in to facilitate a two-day Board and staff retreat followed by a one-day staff only retreat to focus on teambuilding, Board specific agreements, and a strategic plan for the future of Frederick. A full written report and documents were creating summarizing the agreements, next steps, and components of the plan, and the Strategic Plan and Implementation plan were drafted and are in progress.



More examples of our Strategic Plans and complete copies of these examples can be found on the website at www.sbrandsolutions.com.



**TOWN OF EAGLE
STRATEGIC PLAN**
Adopted August, 2020

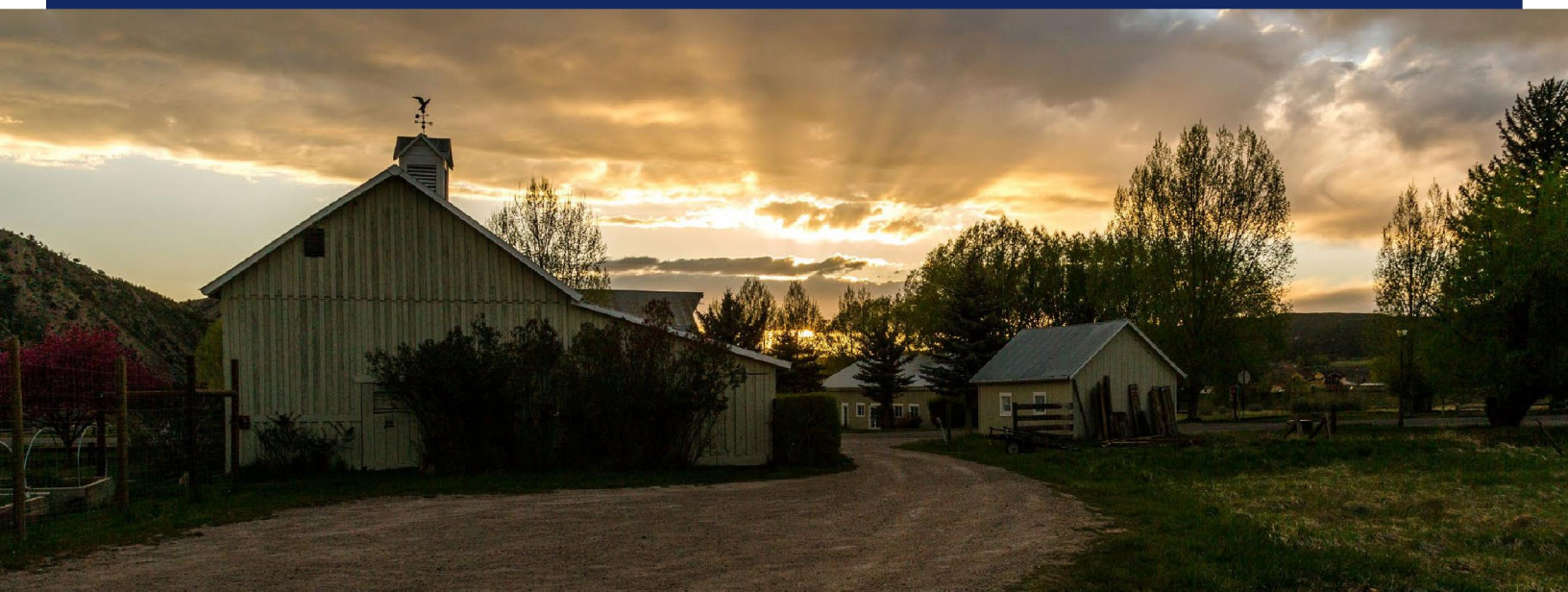
ABOUT THE TOWN OF EAGLE

The Community - Located on the western slope of the Rockies, halfway between Denver and Grand Junction, the Town of Eagle has a population of approximately 6,600 and is one of Colorado's best kept secrets. Eagle offers access to epic mountain biking, trail running and hiking, golf, kayaking, snowmobiling, hunting, and gold-medal fly fishing. In addition to a variety of public parks, there are over 1,000 acres of town owned public open space. Located a short drive from Vail and Beaver Creek, residents also enjoy world-class amenities provided by these resorts. The Eagle County Regional Airport is located just five miles west of Town and serves both commercial and private aviation. Eagle is a thriving community and is a great place to live, work, and visit.

Eagle, the county seat, is a traditional town with a main street lined with shops and cafes. Eagle boasts a variety of great neighborhoods, excellent parks, over 100 miles of single-track trails, concerts in the park, an Arnold Palmer golf course, a county-fair venue, and a variety of restaurants. The community has an authentic western flavor and friendly vibe, attracting top notch events and outdoor adventurers. Its population includes a variety of age groups and income levels. Eagle enjoys a mountain climate with warm dry summers and moderate winters. Average temperatures range from 35 degrees in January and highs up to 85 in July. Typical snowfall is 10-12 inches per month in December through April, yet Eagle boasts over 290 days of sunshine per year.

The Town's Organization - Established in 1887, incorporated in 1905, the Town of Eagle became the County seat in 1921 and adopted a home rule charter in 2020. The Town is a council-manager form of government led by a 7-member Town Council elected for four-year terms. The Town Council appoints the Town Manager, Town Attorney, and Municipal Court Judge. The Town has a staff of approximately 50 dedicated employees with an average longevity of 10 years. Eagle provides a full range of services including police protection, water and wastewater services, street and parks maintenance, community and economic development, and events planning. Fire service is provided by the Greater Eagle Fire Protection District.

The mayor, Town council members, and employees are committed to maintaining and enhancing the quality of life for everyone in the community. The following Strategic Plan reaffirms the values of the Town and outlines the major objectives designed to guide Eagle's future.



PURPOSE OF THE TOWN'S STRATEGIC PLAN

This Strategic Plan has been updated for the community of Eagle by the Town Council and staff during an annual retreat. It establishes a common language and proposes strategies designed to ensure a bright future for Eagle. Specifically, this Plan creates the following outcomes:

- Establishes a 5-year planning horizon, and provides the basis for an ongoing dialogue between the staff, Council, and the community regarding the direction of the Town and specific objectives
- Considers the major challenges and opportunities likely to arise during the planning horizon and proposes specific objectives to address these challenges
- Increases confidence among Eagle's Town Council, community leaders, and residents that the Town is appropriately addressing, opportunities, future risks, and needed investments
- Ensures that proposed strategies and activities are consistent with the Town's mission and values, especially the commitment to enhance quality of life
- Provides sufficient information to allow the Town's staff to develop more specific actions and tasks, and ultimately fulfill Eagle's Vision for the future

It is important to emphasize that this Strategic Plan does not approve or communicate final policy decisions on specific issues or objectives. Rather, it provides a framework for an ongoing dialogue about maintaining and enhancing the quality of life in Eagle. Each of the Major Objectives in this Plan will require additional collaboration by the Town's staff, advice from experts, and input from the community before the Town Council makes final policy or investment decisions. The Town will provide ample opportunities for citizens to be engaged as specific issues are addressed.



ELEMENTS OF THE STRATEGIC PLAN



FOUNDATION

The Town's Vision, Mission and Values establish a foundation for meeting the needs of the community, and defining how the staff of the Town will conduct business.



GUIDING PRINCIPLES

The Town's Guiding Principles describe specific commitments to protect the interests of the residents and businesses in Eagle. These Principles provide the framework for identifying more explicit standards and for engaging with the community on important issues.



MAJOR OBJECTIVES

The Major Objectives outlined in this plan identify significant challenges, opportunities, or investments likely to arise during the planning horizon. In general, these objectives do not address tasks associated with normal daily operations. The information provided in each objective is designed to provide a foundation for future collaborations between the Town Council, staff, community leaders, and the residents of Eagle. These collaborations will likely result in one or more policy decisions by the Town Council to address the stated problem or opportunity.

The Implementation Plan is a separate document, created by staff and approved by the Town Council that captures the strategies and tactics used to accomplish the Major Objectives. The Implementation Plan is consistently updated and the results are captured and reported back to the Town Council. Each implementation step has been linked to the Major Objectives and the Guiding Principles as well as to the Mission and Vision of the Town of Eagle.

FOUNDATION

VISION

The Town of Eagle is a vibrant mountain community that is diverse, inclusive, and unique.

MISSION

Maintain and enhance the quality of life for everyone in our community.

VALUES

We are guided in our daily decisions and activities by these values:

Integrity

We are open, honest, and ethical in all our communications and actions.

Respect

We thoughtfully consider each other's differences and opinions.

Commitment

We give our individual best to get the job done right.

Responsibility

We are accountable for our behaviors, action, and use of public resources.

Collaboration

We listen and openly share our ideas to achieve better decisions and outcomes.

Leadership

We are proactive in advancing the interests of our communities.



GUIDING PRINCIPLES

Guiding Principles describe the Town's commitments to advance the interests of Eagle's residents and businesses. The Town's Guiding Principles establish a framework for developing more detailed standards, assessing risks, identifying issues, and evaluating and implementing solutions. These Guiding Principles also enable the Town to clearly communicate the value of its activities and proposed investments. In addition to the Mission Statement, the Town's commitments to provide value are as follows:



**Proactive Economic
Development**



**Progressive Community
Based Law Enforcement**



**Protecting Public
Health, Safety, and the
Environment**



**Reliable and Cost
Effective Services**



**Sound Planning and
Appropriate Investment**



**Sustainable Finances and
Increasing Efficiency**



**Transparency and
Community Engagement**

The following narrative provides more information on the Town's Guiding Principles and articulates some of the Town's specific standards

Appropriate Investment

Providing reliable services requires funding that covers today's financial needs and supports investments in the Town's vision for the future. The Town must also invest in a highly effective, motivated, and well-trained workforce.

Proactive Economic Development

Eagle's economy is the engine for quality of life. Eagle is fortunate to have a variety of natural and developed assets, including its location on Interstate 70, proximity to world class ski resorts and the regional airport, and access to multiple outdoor activities, including hiking, mountain biking, fishing, river rafting, kayaking, snowmobiling, and hunting.

Progressive Community Based Law Enforcement

The Town of Eagle Police Department is defined by transparency, community building, and adaptability. Utilizing a community policing approach as its baseline, the department is committed to evolving thoughtfully to respond to the needs of Eagle and its visitors with a progressive, and sometimes non-traditional approach to law enforcement.

Protecting Public Health, Safety, and the Environment

The Town is committed to protecting the well-being of the community. This means supporting dynamic and diverse neighborhoods, and maintaining a strong framework for business opportunities, being good stewards of the environment.

Reliable and Cost-Effective Services

A key responsibility for the Town is to provide essential services, whether it be reliable water and sewer services, trash and recycling services, or support with respect to permitting, zoning, planning, and other basic needs. Meeting the needs of customers also requires that the Town adopt standards of service that make it easy for people to do business with the Town.

Sound Planning

The foundation for providing reliable services and quality of life is planning. The Town focuses on adequate resources, reliable infrastructure, compliance with regulations, and a local economy that supports a high quality of life for Eagle residents.

Sustainable Finances and Increasing Efficiency

The Town's financial capabilities and standards ensure that it has the financial strength and resources to provide the reliable and high-quality services that residents expect. The Town's finances must be resilient to economic downturns, cover the full cost of operations, provide adequate funding to maintain financial reserves, and support capital investment.

Transparency and Community Engagement:

By providing easy access to information and timely responses to customer inquiries, the Town creates an environment that fosters public trust and allows Eagle's residents and business owners to understand the Town's values, priorities and strategic plans. The Town is committed to maintaining an ongoing, meaningful, and substantive dialogue with the community that is based on clearly defined standards and compelling arguments for proposed policies and investments.



MAJOR OBJECTIVES

Eagle's Strategic Plan employs several criteria for assessing future challenges and opportunities. These criteria include the following:

- Ensuring that the Town is adhering to its mission statement and aggressively pursuing its vision
- Continuing to enhance the Town's workforce and performance
- Anticipating and planning for changes in regulations or legal requirements
- Responding to economic trends and evolving needs of Eagle's residents and businesses

Based on the criteria above, the Town has developed a series of Major Objectives. The following Major Objectives describe the most significant areas, challenges, and opportunities likely to come before Eagle's Town Council within a 5-year planning horizon. As stated above, they do not represent final decisions by the staff or Town Council, rather they provide enough detail for the Town's staff to develop specific action steps, continue clarifying the issues, collaborate with experts, and inform the public. Each Major Objective adheres to Guiding Principles and is designed to align with the Town's vision and mission statement, which is to maintain and enhance the quality of life for everyone in Eagle. These objectives and associated activities may have implications well beyond the planning horizon, consistent with the need to have a long-term view. The following Major Objectives address these fundamental realities in an integrated manner. They are listed in alphabetical order, as they are all equally important to the community.

MAJOR OBJECTIVES



STIMULATE ECONOMIC VITALITY AND DEVELOPMENT

The Town focuses on development that follows the Elevate Eagle Comprehensive Plan to ensure results that maximize the economic benefits. The economic impact of visitors and business investments result in positive benefits in terms of amenities, job creation, increases in wages, infrastructure and the overall quality of life.



IMPROVE COMMUNITY RESPONSIVE SERVICES

The Town is adopting policies and regulations to be responsive to changes in the business environment, which will encourage thoughtful growth and development. Community interaction and engagement will inform decision making by the Town Council.



MATCH INFRASTRUCTURE TO QUALITY OF LIFE

The Town is investing in and implementing infrastructure improvements that increase the high quality of life and vibrant economy without creating an undue burden on the residents of the Town.



ATTRACT VISITORS

The Town is capitalizing on the unique heritage and outdoor amenities to attract visitors to Eagle. Proximity to I 70 and regional airports along with special events will encourage a wide and diverse range of tourists, bringing an investment which will improve the economy and quality of life for everyone.



FOCUS ON RECREATION, EVENTS AND OPEN SPACE

The Town of Eagle is a destination for outdoor recreation, and residents and visitors participate in a wide range of opportunities and activities. Open space and community buffers will continue to promote a high quality of life and the unique location that is a strong value for the community.



STRENGTHEN TOWN ORGANIZATION AND CULTURE

The Town staff is highly competent, empowered, motivated and collaborative and enjoy working with and for the Town of Eagle. The Town develops this potential by creating a work culture that is inclusive, respects employees, and values contributions at all levels. Training, benefits and pay are competitive and result in attraction and retention of a high quality workforce.



ENHANCE THE ECONOMIC RESILIENCY OF THE TOWN GOVERNMENT

The Town is fiscally responsible, and revenues received are balanced against current and future needs of the community. Diversified sources of revenue are allocated to provide a high quality of life while ensuring ongoing maintenance and operation of current amenities.



INVEST IN ENVIRONMENTAL AND ENERGY SUSTAINABILITY

The Town is focused on environmental impacts of decision making and will ensure that projects and policies reflect a focus on improving and sustaining natural resources for future generations.



DIVERSIFY THE ATTAINABLE HOUSING STOCK

The Town creates opportunities for a diversified, attainable housing stock for a variety of rental and purchase options.

STRATEGIC GOALS



Stimulate Economic Vitality and Development

- Support a Business Improvement District or similar approach
- Continue to create opportunities on Highway 6
- Develop a comprehensive strategy for economic vitality



Improve Community Responsive Services

- Revise the existing code
- Review policies and identify areas to simplify for administrative approval
- Adopt zoning or overlay districts that are designed to achieve this outcome



Match Infrastructure to Quality of Life

- Develop and implement broadband solutions
- Implement a system for reporting maintenance issues
- Evaluate impact fees throughout the Town
- Adopt a multi-modal transportation plan



Attract Visitors

- Develop the Eagle Brand
- Fund a Wayfinding, Gateway and Entry Signage Plan
- Collaborate with regional tourism & marketing efforts



Focus on Recreation, Events and Open Space

- Adopt a Capital Improvement Plan for open space & parks
- Identify a sustainable revenue source for open space
- Support culturally diverse events in the community



Strengthen Town Organization and Culture

- Build capacity of existing staff through strategic investments
- Establish and fund competitive salary and benefits plan
- Invest in technology and systems to improve performance



Enhance the Economic Resiliency of the Town Government

- Adopt policies to ensure value of real property in Town
- Identify partners for revenue sharing
- Identify and implement diverse revenue streams



Invest in Environmental and Energy Sustainability

- Research the feasibility of a sew electric utility
- Set goals for energy reduction for Town or community
- Adopt a philosophy and principles for sustainability



Diversify the Attainable Housing Stock

- Develop a strategy for housing
- Collaborate on solutions in the West Eagle Area
- Revise the inclusionary zoning standards to be more specific



CONCLUDING REMARKS

The execution of this plan will begin by assigning the Town staff to research each of the Major Objectives and create specific action steps and implementation items. The staff will return to the Town Council to offer recommendations, present updates, and continue to discuss the Strategic Plan. The financial implications of implementing the Major Objectives will be reflected in specific policy proposals, discussions with the community during outreach efforts, and included in the Town's operating and capital budgets. In addition, as important policy issues come before the Town Council, the supporting information provided by the staff will reference the relevant Major Objective from this Strategic Plan.

The Town is committed to ensuring that the implementation of this plan reflects the mission, vision, and values of the Town as defined by the staff, the Town Council, community leaders, and members of the public who choose to provide input. If at any time the Town's staff or Town Council feel that this Plan is at odds with prevailing sentiments in the community, then the Plan will be altered accordingly. The Town anticipates this Plan will be subjected to a formal update in 2-3 years. This will not be a re-creation of the plan, but an update that reflects progress, new insights, and feedback received during outreach efforts.

For more information about this plan, please visit the Town of Eagle website at www.townofeagle.org or contact the Town Manager at

 **PO Box 609
200 Broadway
Eagle, CO 81631**

 **970-328-6354**

 **970-328-5203**



TOWN OF FREDERICK

STRATEGIC PLAN 2020 – 2025

A Refreshed Plan for the Future

Change remains the constant in Durham County. Whether it is with the County's dynamic workforce or across a diverse community of residents or with regards to an ever-evolving landscape of buildings, organizations, businesses and institutions, Durham continues to change. Within our organization, we've intentionally focused on creating positive organizational and service change, with continuous improvement as a guiding principle.

Since our first Strategic Plan was adopted in Spring 2012, County leadership has implemented the Managing for Results (MFR) change management model. Combined, the Strategic Plan and MFR define the changes that the County hopes to achieve. We are proud of these needed evolutions and advancements, and we eagerly look to the future.

The Durham County Strategic Plan will help the organization plan for the future, whatever it brings. This time around, County leadership and staff have been more intentional about developing a document that truly connects the work of our 27 departments to overarching goals, objectives and strategies. This time around, with Managing for Results as the County's change management model, performance measurement is better integrated into how the organization plans and provides services. Those performance measures will help us continually make improvements and investments based on what the data tell us. This Strategic Plan does not shy away from the complexities of the organization's and the community's challenges and opportunities. This plan, which connects the work of multiple departments in a series of overarching strategies, embraces collaboration.

This 2017-2021 Durham County Strategic Plan, like the first document from 2012, is a dynamic guiding vehicle for the organization. It will be updated each year through the County's annual operating budget process. And it will serve as a framework for future conversations and decisions about ways that the County can continue to improve service delivery to prepare for whatever the future brings. Durham County is a passionate, growing community of employees and residents. We look forward to continuing to serve you, the community, and to working with you as residents to help us address the challenges and opportunities ahead.

Wendell M. Davis, County Manager

Wendy Jacobs, Chair; James Hill, Vice Chair; Heidi Carter, Brenda Howerton and Ellen Reckhow Durham Board of County Commissioners

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MISSION, VISION AND CORE VALUES

OUR MISSION

We are a community, rich in tradition and opportunities.

OUR VISION

Building a safe, inviting, and culturally vibrant community which fosters economic growth and opportunity, while preserving our heritage

OUR CORE VALUES

People

Trust, Communication, Respect, Recognition

Service

Quality, Efficient, Friendly, Timely

Integrity

Truthfulness, Character, Fairness, Openness

Commitment

Initiative, Dedication, Involvement, Perseverance

Excellence

Competence, Desire, Innovation, Progressive

Performance

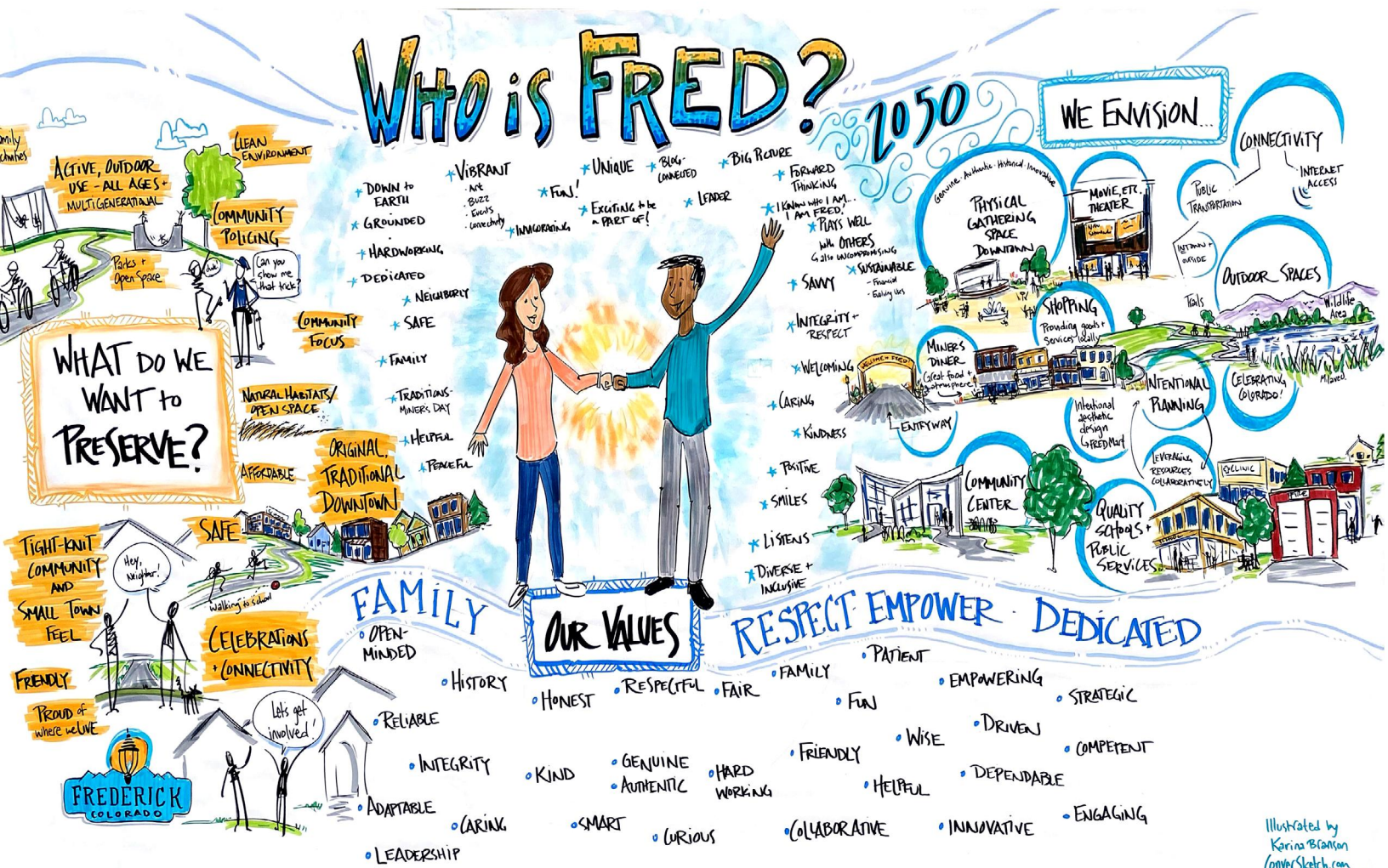
Planning, Decisions, Follow-Through, Professionalism, Results Oriented

We are FRED! About the Town of Frederick

Community Facts

- Elevation: 4972 feet
- 300 Plus "Sunny days" per year / Annual snow fall 37" / Annual Precipitation 13"
- Neighborhoods - 29
- Golf Courses - 1
- Museum - 1
- Lakes and Ponds - 2
- Community Parks - 22
- Community Parks - 3
- Greenway/Open Space (Educational) - 1
- Recreation Center - 1
- 25 Ski Areas (within driving distance)

The Vision for Frederick's future is based on **WHO we are**: what does Frederick feel like for our residents, our business owners, our visitors? What does Frederick look like? How would people describe us in conversations? A graphic facilitator captured that **Vision** - and you can see the results below! Everything we do in the **Town of Frederick** will lead to the creation of this Vision.



Illustrated by
Korina Branson
CoverSketch.com

About the Town of Frederick

We are a vibrant and growing community along the Front Range of the Colorado Rocky Mountains that strives to preserve our small-town feel and community togetherness as we grow. We are happy to have you as a part of our community if you call Frederick home. If you are new to our community, we encourage your interest and invite you to learn more about us through this website.



BEST SMALL TOWN

In 2019, USA Today named the Town of Frederick as one of the top 50 places to live in the United States and Colorado's number one town. Twenty miles north of the Mile High City lies one of the best small towns near Denver, the Town of Frederick, CO. This family-friendly small Town near Denver has a rich history of being built on what matters.

The Town of Frederick is located on Colorado's beautiful Front Range of the Rocky Mountains. The Town comprises 14 square miles of area, east and west of Interstate 25, south of State Highway 119 and along State Highway 52. Its current population of over 14,000 residents enjoy the Town's central location, allowing easy access to the Denver and northern metropolitan areas. The transportation network opens up a wide variety of major attractions less than 30 minutes away. At the center of the Carbon Valley area, including Firestone, Dacono, Mead and Erie, Frederick stands out as a community hub for a larger population of 46,000. Community members enjoy unparalleled views of the Rocky Mountains and recreational opportunities abound throughout the community's trails, parks and open space. Educational amenities and community involvement opportunities allow Frederick's residents to take an active role in shaping the place they are proud to call home. As one of the fastest-growing communities in Colorado, Frederick is working hard to ensure that growth results in a cohesive community that preserves the small-town feel and rich heritage its residents have come to enjoy.

FAMILY FRIENDLY

Frederick's median age of 33.3 says more about the kind of people attracted to this small town near Denver's family-friendly environment than anything else we could say: young families are choosing to call Frederick home. Top-notch public safety, a vast array of community amenities and a stellar school system all make Frederick the perfect place for a growing family.

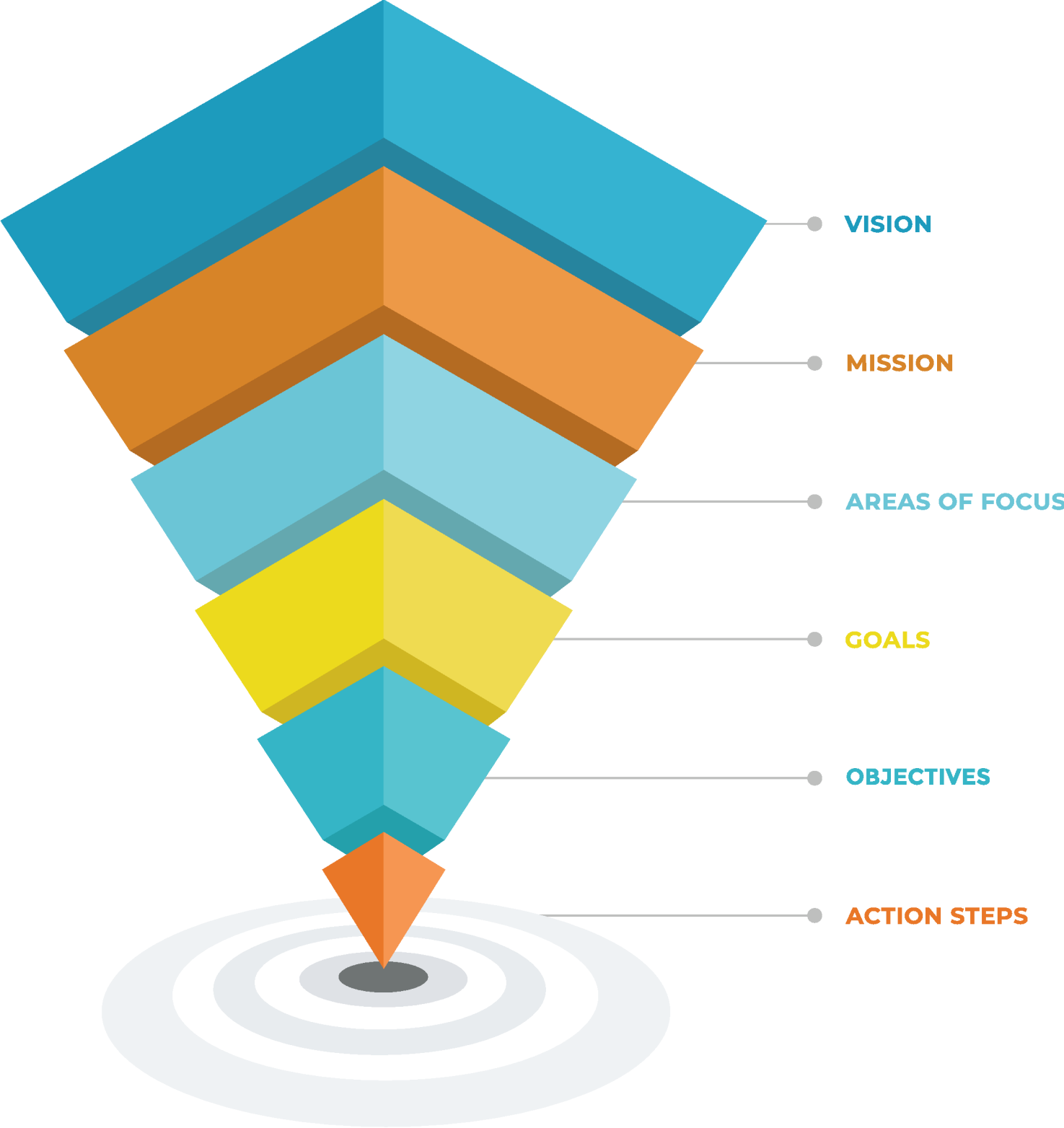
Frederick has an active Neighborhood Watch program that the Frederick Police Department works hard to support to foster two-way communication with each neighborhood. Frederick is also served by the Frederick-Firestone Fire Protection District, which recently received a Class 2 rating from the Insurance Service Office (ISO), putting them in the top 1.5% of fire department ISO ratings in Colorado and the United States.

Frederick currently has 26 acres of park land per 1,000 people, which is significantly higher than most communities in the Front Range and 85% of all residents have a pocket park or neighborhood park within walking distance. Frederick is also home to the Carbon Valley Recreation Center, Gymnastics Center and Senior Center as well as the Bulrush Wetland Park and Frederick Recreation Area.

Frederick is part of the St. Vrain Valley School District, the 8th largest in the state. Superintendent Don Haddad was named the 2013 National Superintendent of the Year and the district is regularly honored with statewide awards for excellence. The St. Vrain Valley School District works tirelessly to provide students with an education full of diverse opportunities while staying on the cutting edge of technology and educational trends. There are twelve schools in the Carbon Valley area, of which six are in Frederick, including Frederick High School.

The Strategic Plan Process

The Town of Frederick has invested in the future of the community through strategic planning. Based on many hours of thoughtful debate and discussion, the Frederick team reaffirmed the community's core values and created a path to the future. The strategic plan process is summarized in the pyramid below, where the vision informs every step of the plan through implementation.





Thoughtful Growth and Development



This area of focus includes economic development, affordable housing, diversified business opportunities, regulations and policies, open space and parks, job development, revenue and staffing levels to support that growth and development. The Town of Frederick is working towards a balance of residential and commercial development that will support the right kind of thoughtful population and business growth and will be poised to take advantage of opportunities that fit into Frederick as a sustainable part of the future. With the shared support of partners in the community and a robust set of policies and guidelines, Frederick can preserve what is important and enhance what is meaningful.

Goals

- Ensure that the land use code and other related policies and plans reflect FRED, which is how we refer to our values and culture in the community.
- Explore opportunities for economic development for short, medium and long term investments.
- Identify sustainable funding sources and options to support economic development.
- Support the growth, expansion, retention and attraction of diverse and unique businesses.
- Retain appropriate staffing levels and structure for existing and future growth.





Sustainable Infrastructure Investments



This area of focus includes roads, water and wastewater, transportation, capital assets, stormwater drainage, land, trails, parks, open space, technology and the ongoing funding for maintenance of those investments. The Town of Frederick will ensure that infrastructure can support the community's current and future needs through financial sustainability, leveraging technology and strengthening partnerships.



Goals

- Evaluate current infrastructure assets and identify the current state.
- Review master plans to ensure the financial sustainability component is included in all recommendations.
- Leverage technology to improve community services.
- Assess future transportation trends.
- Support water committee process.
- Develop a long term financial plan for capital investment needs and current revenue sources.
- Ensure that the land use code and other related policies and plans reflect FRED, which is how we refer to our values and culture in the community.



Meaningful Community Engagement



This area of focus includes all forms of community engagement: social media, outreach to the community, public and community meetings, feedback and survey processes, election turnout and involvement from the Frederick community. The Town of Frederick is focused on expanding outreach to and feedback from the community as a whole, helping Frederick understand why and how decisions are made, explaining the impacts of those decisions, and implementing engagement feedback results.

Goals

- Complete feedback loop for addressing community concerns.
- Identify community needs by conducting a community survey.
- Research community channels to meet needs of all residents.
- Create FRED Ambassadors in neighborhoods.
- Determine hurdles to community participation and remove those obstacles.





Community Based Facilities and Services



This area of focus includes town facilities such as parks, open space, town hall, community buildings, trails and more. The Town will base investments into facilities and services that reflect the community needs and desired service levels.



Goals

- Update and adopt master plans for the long-term future of Town facilities.
- Adopt budgets that reflect ongoing operations and maintenance as well as capital costs.
- Identify resources and complete construction of a new public safety building.
- Conduct a community wide assessment of facilities for alignment with FRED.
- Identify property needs using the facilities needs assessment.



The Path Ahead: Strategic Plan Implementation

This Strategic Plan is a living document for the organization. The Town of Frederick Board of Trustees, leadership and staff will remain focused on the measurable objectives and strategies that drive each strategic goal. Those measures will be tracked and reported for any resident, visitor or employee to see through a public-facing dashboard. Additionally, there is an operational plan for the Town that will link to the Strategic Plan. Each budget year, the Strategic Plan will be reviewed and initiatives will be identified to impact targeted strategies. By tracking performance metrics, studying those measures to improve service delivery and annually revisiting the Strategic Plan, the Town will remain focused on sustainable improvement, with the end goal of providing the highest possible value to the community.



CONNECT WITH US

Website: FrederickCO.gov



401 Locust Street
Frederick, Colorado 80530
(720) 382-5500
Communications@FrederickCO.gov

In Frederick...

***We believe in rolling up our sleeves
Not just for ourselves, but for each other.
We believe in playing outside until the stars flicker on
and protecting the hallowed ground of childhood.
We believe in a lifelong commitment to actions as good as our intentions.***

***We believe in the power of our voices and the obligation
of our hearts to form a strong foundation.
We believe we're onto something that's worth all we can give it.
Here the life we dream of is ours to create.***



TO OUR COMMUNITY

It is our pleasure to present the Town of Windsor Strategic Plan for 2020-2025. The Vision, Mission and Guiding Principles provide the foundation for the plan's three key Areas of Focus: Strategic Growth, Sustainable Infrastructure, and Vibrant and Healthy Economy. The town leadership team developed strategic Goals and Action Steps in each Key Area of Focus through extensive feedback as well as local and national trends. Our dedication to protect and support our lifestyle underlies every Strategic Goal. These Goals will guide the work we do to create the future of Windsor.

The Strategic Plan is a tool that clearly captures the most important priorities and helps direct the development of our budget and resource allocation. As a living document, it is our pledge to update the strategic plan on a regular basis so that we can measure our success in coming years.

Sincerely,

*Mayor Paul Rennemeyer, Mayor Pro-Tem Ken Bennett,
Board Member Scott Charpentier, Board Member Julie Cline,
Board Member David Sisloswski, Board Member Victor Tallon
Board Member Barry Wilson*

Vision

Windsor is the hub of Northern Colorado—a safe, unique and special town that offers diverse culture and recreation opportunities. Windsor is recognized as a regional leader that demonstrates fiscal responsibility, environmental stewardship and strategic excellence. Windsor is a Town that thinks big and embraces its hometown pride.

Mission

The Town of Windsor promotes community and hometown pride through sustainable, excellent and equitable delivery of services in a fiscally responsible manner.



THE STRATEGIC PLANNING PROCESS



The Town of Windsor has a foundation of success based on strategically planning for the future. Our strategic plan is updated every two years in a process that involves the Town Board, the staff and our community. Through our community survey and public meetings, we determine the areas in which we can focus and improve our efforts, as well as those areas which we can continue to excel.

Staff adheres to the Strategic Plan by implementing Action Steps that accomplish the Goals that are defined in this document. That implementation plan is updated monthly and can be found on the Town website for reference.

2020-2025

STRATEGIC PLAN



For more information, visit
windsorgov.com/Performance-Dashboard.

301 Walnut St., Windsor, CO
970-674-2400
windsorgov.com
f t i y h

Guiding Principles

COMMUNITY SAFETY

Windsor ensures that safety of our community is at the forefront of every decision we make. We accomplish this through design, construction of infrastructure, prevention and preparedness. We sustain an active emergency management system focused on prevention, preparedness and recovery with key partnerships in place for effective response during a crisis. We safeguard our infrastructure through best management practices and long-term planning to deliver safe and reliable Town-provided utilities and services.

FISCAL RESPONSIBILITY

Windsor is committed to sound fiscal management and transparency in all decision making. We plan for future generations through adequate allocation of resources that will allow for operations and maintenance of our facilities and land. We consistently evaluate our resources to maintain a healthy balance of programs and services.

QUALITY OF LIFE

Windsor has a healthy, active lifestyle that provides opportunities for residents and visitors of all ages and abilities to experience a full array of recreational services and natural resources. We take pride in our well-connected and involved community that truly cares about each other demonstrated by the exceptional customer service of our workforce and the self-respect reflected through the attractiveness of our town.

SMALL TOWN FEEL

Windsor thrives on its unique locale and the personal relationships built from years of services together that create and support a friendly and welcoming community. We value collaboration and respect as the foundation of all our interactions. Community engagement is focused on building an opportunity for open and transparent conversations.



STRATEGIC GROWTH

Windsor is committed to well planned and strategically designed growth of our community through a connected transportation system, community buffers, services and amenities that reflect the needs of our Town, and sustainable natural resources such as water.



Goals

- Assess organizational readiness to ensure a proactive emergency response
- Establish community separators and preserve open space that ensure Windsor maintains its identity and quality of life
- Facilitate discussions around growth impacts with special districts and other government agencies, governing boards, and elected officials
- Assess and address long term capital facility needs

VIBRANT & HEALTHY ECONOMY

Windsor is business-friendly. We maintain a viable, stable, diverse, and strategic economic base which supports the needs and enhances the lifestyles of those living and working in our community.



Goals

- Enhance and expand community and downtown vitality
- Attract diverse and unique restaurants throughout Windsor
- Promote business diversification in the community
- Attract balanced commercial development that will sustain the future of Windsor
- Make Windsor into a tourist destination
- Implement a public art program

SUSTAINABLE INFRASTRUCTURE

Windsor places considerable value on its delivery of energy resources, quality modes of transportation, accurate communication systems, efficient water and waste management, along with our Public Works facilities that maintain these services supporting and enabling the high quality of activities enjoyed by our community.



Goals

- Design and implement a well-connected, efficient, multi-modal transportation network
- Establish alternate routes to diminish truck traffic on Main Street
- Establish pedestrian and bicycle connectivity throughout Windsor
- Increase public transportation opportunities for Windsor residents
- Provide a safe and reliable water supply for the current and future community
- Adequately maintain and ensure that infrastructure (streets, trails, water & sewer) aligns with growth
- Ensure equitable parks/trails/open space/cultural infrastructure in all neighborhoods and areas throughout Windsor
- Invest in the improvement of public space and facilities outside of the downtown area creating additional cultural destination amenities.
- Support efforts to make the Windsor downtown area a cultural center for public art, events and activities



For more information, visit windsorgov.com/1241/Performance-Dashboard.