



CITY OF GRAND JUNCTION, COLORADO

CONTRACT

This CONTRACT made and entered into this 6th day of April, 2023 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 **Raftelis Financial Consultants, Inc.** hereinafter in the Contract Documents referred to as the "Firm."

WITNESSETH:

WHEREAS, the Owner advertised that sealed Bids 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 **Strategic Planning Consultant RFP-5186-23-DH**.

WHEREAS, the Contract has been awarded to the above-named Firm by the Owner, and said Firm is now ready, willing and able to perform the Work specified in the Notice of Award, in accordance with the Contract Documents;

NOW, THEREFORE, in consideration of the compensation to be paid the Firm, 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 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 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. Solicitation Documents for the Project; **Strategic Planning Consultant;**
- c. Firms Response to the Solicitation
- d. Work Change Requests (directing that changed work be performed);
- e. Field Orders

f. Change Orders.

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

ARTICLE 4

Contract Time and Liquidated Damages: Time is of the essence with respect to this Contract. The Firm hereby agrees to commence Work under the Contract on or before the date specified in the Solicitation from the Owner, and to achieve Substantial Completion and Final Completion of the Work within the time or times specified in the Firm's negotiated project schedule.

ARTICLE 5

Contract Price and Payment Procedures: The Firm shall accept as full and complete compensation for the performance and completion of all of the Work specified in the Contract Documents, the not to exceed cost of **Thirty Five Thousand and 00/100 Dollars (\$35,000.00)**. **This cost pertains to the Onsite/Personal Meetings Option selected by the City.** 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 Board of Commissioners 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 work to be performed, which work causes the aggregate amount payable under this Contract to exceed the amount appropriated for this Project, unless and until the Owner provides Firm written assurance that lawful appropriations to cover the costs of the additional work have been made.

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

ARTICLE 6

Contract Binding: The Owner and the Firm 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



**Request for Proposal
RFP-5186-23-DH**

Strategic Planning Consultant

RESPONSES DUE:

February 10, 2023 prior to 3:00 PM

Accepting Electronic Responses Only

***Responses Only Submitted Through the Rocky Mountain E-Purchasing System
(RMEPS)***

<https://www.rockymountainbidsystem.com/default.asp>

(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)

NOTE: All City solicitation openings will continue to be held virtually.

PURCHASING REPRESENTATIVE:

Duane Hoff Jr., Contract Administrator

duaneh@gjcity.org

970/244-1545

REQUEST FOR PROPOSAL

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REQUEST FOR PROPOSAL

SECTION 1.0: ADMINISTRATIVE INFORMATION & CONDITIONS FOR SUBMITTAL

NOTE: It is the Firm's responsibility to read and review all solicitation documentation in its entirety, and to ensure that they have a clear and complete understanding of not only the scope, specifications, project requirements, etc., but also all other requirements, instructions, rules, regulations, laws, conditions, statements, procurement policies, etc. that are associated with the solicitation process and project/services being solicited.

- 1.1 Issuing Office:** This Request for Proposal (RFP) is issued by the City of Grand Junction. All contact regarding this RFP is to be directed to the Purchasing Agent

Duane Hoff Jr., Contract Administrator
duaneh@gjcity.org

With the exception of Pre-Bid or Site Visit Meeting(s) all questions, inquiries, comments, or communication pertaining to this solicitation (whether process, specifications, scope, etc.) must be directed in writing to the Purchasing Agent. Other communication may result in disqualification.

- 1.2 Purpose:** The purpose of this RFP is to obtain proposals from qualified Consultants to provide meeting facilitation and development of a two-year strategic plan for the Grand Junction City Council.
- 1.3 The Owner:** The Owner is the City of Grand Junction, Colorado and is referred to throughout this Solicitation. The term Owner means the Owner or his authorized representative.
- 1.4 Compliance:** All Offerors, by submitting a proposal, agree to comply with all conditions, requirements, and instructions of this RFP as stated or implied herein. Should the Owner omit anything 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 Agent prior to submittal deadline.
- 1.5 Procurement Process:** The most current version of the City of Grand Junction [Purchasing Policy and Procedure Manual](#) is contracting.
- 1.6 Submission:** See section 5.0 for Preparation and Submittal Terms. Proposals be formatted as directed in Section 5.0. Submittals that fail to follow this format may be ruled non-responsive. To participate in the solicitation opening, please utilize the following information and link:

Solicitation Opening, RFP-5186-23-DH, Strategic Planning Consultant
Feb 10, 2023, 3:00 – 3:30 PM (America/Denver)

Please join my meeting from your computer, tablet or smartphone.
<https://meet.goto.com/227045493>

You can also dial in using your phone.

Access Code:

227-045-493

United States:

+1 (571) 317-3122

Join from a video-conferencing room or system.

Meeting ID:

227-045-493

Dial in or type:

67.217.95.2 or inroomlink.goto.com

Or dial directly:

227045493@67.217.95.2 or 67.217.95.2##227045493

Get the app now and be ready when your first meeting starts:

<https://meet.goto.com/install>

- 1.7 **Altering Proposals:** Any alterations made prior to opening date and time must be initiated by the Offeror. Proposals may not be altered or amended after submission deadline.
- 1.8 **Withdrawal of Proposal:** A proposal must be firm and valid for award and may not be withdrawn or canceled by the Offeror for sixty (60) days following the submittal deadline date, and only prior to award.
- 1.9 **Acceptance of Proposal Content:** The selected proposal shall become contract documents. 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. When a contract is executed by and between the Offeror and the City, the Offeror may be referred to as the Consultant or Firm.
- 1.10 **Addenda:** All questions shall be submitted in writing to the Purchasing Agent. 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 Purchasing Agent. Sole authority to authorize addenda shall be vested in the Purchasing Agent. Addenda will be issued electronically through the Rocky Mountain E-Purchasing website at www.rockymountainbidsystem.com. Offerors shall acknowledge receipt of all addenda in the proposal.
- 1.11 **Exceptions and Substitutions:** All proposals meeting the intent of this RFP shall be considered for award. An Offeror taking exception to the specifications does so at the Offeror's risk. The Owner reserves the right to accept or reject any or all substitutions or alternatives. When offering substitutions and/or alternatives, Offeror must state any exception(s) in the section to which the exception(s) pertains. Exception/substitution, if accepted, must meet or exceed the stated intent and/or specifications. The absence of stated exception(s) indicates 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 the proposal and contract documents.
- 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 may establish a confidential, proprietary relationship. Any material to be treated as confidential or proprietary in nature must include a written explanation for the request. Consistent with CORA, the request shall be reviewed decided by the Owner. If denied, the Offeror shall have the opportunity to withdraw its proposal, or to remove the confidential or proprietary information. Neither cost nor pricing information nor the entire proposal may be claimed as confidential or proprietary.

- 1.13 Response Material Ownership:** All proposals become the property of the Owner upon receipt and may only be returned to the Offeror at the Owner’s option. Selection or rejection of the proposal shall not affect this right. The Owner 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 entitled “Confidential Material”. Disqualification of a proposal does not eliminate the City’s right.
- 1.14 Minimal Standards for Responsible Prospective Offerors:** The Offeror must affirmatively demonstrate its responsibility. A prospective Offeror must meet the following requirements.
- 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 Owner.
- 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. All proposals shall be open for public inspection after the contract is awarded.
- 1.16 Sales Tax:** The Owner is exempt from the State, County, and Municipal Sales Tax and Federal Excise Tax; therefore, all fees shall not include taxes.
- 1.17 Public Opening:** Proposals shall be opened in a virtual meeting immediately following the proposal deadline. Offerors, their representatives and interested persons may be present. Only the name(s) and business address of the Offeror(s) 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 which shall be acknowledged by the Offeror on the Letter of Interest or Cover Letter. The Offeror must be legally authorized to execute Letter of Interest or Cover Letter together with contractual obligations. By submitting a proposal the Offeror accepts all terms and conditions including compensation, as set forth herein. An Offeror shall identify clearly and thoroughly any variations between its proposal and the Owner’s RFP requirements. Failure to do so may be deemed a waiver of any right(s) to subsequently modify the term(s) of performance, except as specified in the RFP.

- 2.2. Execution, Correlation, Intent, and Interpretations:** The Contract Documents shall be signed by the Owner and Firm. By executing the Contract, the Firm represents that it has familiarized itself with the local conditions under which the Services is to be performed and correlated its 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 Contract Documents is to include all labor, materials, equipment, services and other items necessary for the proper execution and completion of the Scope of Services as defined in the technical specifications and/or drawings contained herein. All drawings, specifications and copies furnished by the Owner are, and shall remain, Owner property. They are not to be used on any other project.
- 2.3. Permits, Fees, & Notices:** The Firm shall secure and pay for all permits, governmental fees and licenses necessary for the proper execution and completion of the Services. The Firm shall give all notices and comply with all laws, ordinances, rules, regulations and orders of any public authority, including the City, bearing on the performance of the Services. If the Firm observes that any of the Contract Documents are at variance in any respect, It shall promptly notify the Purchasing Agent in writing, and any necessary changes shall be adjusted. If the Firm performs any Services knowing it to be contrary to such laws, ordinances, rules and regulations, and without such notice to the Owner, it shall assume full responsibility and shall bear all costs attributable to the non-conforming Services.
- 2.4. Responsibility for those Performing the Services:** The Firm shall be responsible to the Owner for the acts and omissions of all his employees and all other persons performing any of the services under a contract with the Firm.
- 2.5. Payment & Completion:** The Contract Sum is stated in the Contract and is the total amount payable by the Owner to the Firm for the performance of the services under the Contract Documents. Upon receipt of written notice that the services is ready for final inspection and acceptance and upon receipt of application for payment, the Owner's Project Manager will promptly make such inspection and, when they find the services acceptable under the Contract Documents and the Contract fully performed, the Owner shall make payment in the manner provided in the Contract Documents. Partial payments will be based upon estimates, prepared by the Firm, of the value of services performed and materials placed in accordance with the Contract Documents. The services performed by Firm shall be in accordance with generally accepted professional practices and the level of competency presently maintained by other practicing professional firms in the same or similar type of services in the applicable community. The services and services to be performed by Firm hereunder shall be done in compliance with applicable laws, ordinances, rules and regulations.
- 2.6. Protection of Persons & Property:** The Firm shall comply with all applicable laws, ordinances, rules, regulations and orders of any public authority having jurisdiction for the safety of persons or property or to protect them from damage, injury or loss. Firm shall erect and maintain, as required by existing safeguards for safety and protection, and all reasonable precautions, including posting danger signs or other warnings against hazards promulgating safety regulations and notifying owners and users of adjacent utilities. When or where any direct or indirect damage or injury is done to public or private property by or on account of any act, omission, neglect, or misconduct by the Firm in the execution of the

services, or in consequence of the non-execution thereof by the Firm, they shall restore, at their own expense, such property to a condition similar or equal to that existing before such damage or injury was done, by repairing, rebuilding, or otherwise restoring as may be directed, or it shall make good such damage or injury in an acceptable manner.

- 2.7. Changes in the Services:** The Owner, without invalidating the contract, may order changes in the services within the general scope of the contract consisting of additions, deletions or other revisions. All such changes in the services shall be authorized by Change Order/Amendment and shall be executed under the applicable conditions of the contract documents. A Change Order/Amendment is a written order to the Firm signed by the Owner issued after the execution of the contract, authorizing a change in the services or an adjustment in the contract sum or the contract time.
- 2.8. Minor Changes in the Services:** The Owner shall have authority to order minor changes in the services not involving an adjustment in the contract sum or an extension of the contract time and not inconsistent with the intent of the contract documents.
- 2.9. Uncovering & Correction of Services:** The Firm shall promptly correct all services found by the Owner as defective or as failing to conform to the contract documents. The Firm shall bear all costs of correcting such rejected services, including the cost of the Owner's additional services thereby made necessary. The Owner shall give such notice promptly after discover of condition. All such defective or non-conforming services under the above paragraphs shall be removed from the site where necessary and the services shall be corrected to comply with the contract documents without cost to the Owner.
- 2.10. Acceptance Not Waiver:** The Owner's acceptance or approval of any services furnished hereunder shall not in any way relieve the proposer of their present responsibility to maintain the high quality, integrity and timeliness of his services. The Owner's approval or acceptance of, or payment for, any services shall not be construed as a future waiver of any rights under this Contract, or of any cause of action arising out of performance under this Contract.
- 2.11. Change Order/Amendment:** No oral statement of any person shall modify or otherwise change, or affect the terms, conditions or specifications stated in the Contract. All amendments to the Contract shall be made in writing by the City Contract Administrator.
- 2.12. Assignment:** The Firm shall not sell, assign, transfer or convey the Contract resulting from this RFP, in whole or in part, without the prior written approval from the Owner.
- 2.13. Compliance with Laws:** Proposals must comply with all Federal, State, County and local laws governing of the service and the fulfillment of the Service(s) for and on behalf of the public. Firm hereby warrants that it is qualified to assume the responsibilities and render the services described herein and has all requisite corporate authority and professional licenses in good standing, required by law.
- 2.14. Debarment/Suspension:** The Firm hereby certifies that the Firm is not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Governmental department or agency.

- 2.15. Confidentiality:** All information disclosed by the Owner to the Offeror for the purpose of the services to be done or information that comes to the attention of the Offeror during the course of performing such services is to be kept strictly confidential.
- 2.16. Conflict of Interest:** No public official and/or Owner employee shall have interest in the Contract resulting from this Request for Proposal.
- 2.17. Contract:** This Request for Proposal, submitted documents, and any negotiations, when properly accepted by the Owner, shall constitute an enforceable agreement equally binding between the Owner and Firm. The Contract represents the entire and integrated agreement between the City and the Firm 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 Amendment.
- 2.18. Project Manager/Administrator:** The Project Manager, on behalf of the Owner, shall render decisions in a timely manner pertaining to the Services proposed and/or performed by the Firm. The Project Manager shall be responsible for approval and/or acceptance of any related performance of the Scope of Services.
- 2.19. Contract Termination:** The Contract shall remain in effect until any of the following occurs: (1) Contract expires; (2) completion of Services; (3) final 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.
- 2.20. Employment Discrimination:** During the performance of any services per agreement with the Owner, the Firm, agrees to:
- 2.20.1. 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 Firm. The Firm agrees to post in conspicuous places, visible to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.
- 2.20.2. In all solicitations or advertisements for employees placed by or on behalf of the Firm, that the Firm is an Equal Opportunity Employer. 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.
- 2.21. Immigration Reform and Control Act of 1986 and Immigration Compliance:** The Firm certifies that it does not and will not during the performance of the Contract employ Service(s)er without authorization services or otherwise violate the provisions of the Federal Immigration Reform and Control Act of 1986 and/or law regulating immigration compliance.

- 2.22. Ethics:** The Firm shall not accept or offer gifts or anything of value and/or enter into any business arrangement with any employee, official, or agent of the Owner.
- 2.23. Failure to Deliver:** In the event of failure of the Firm to perform in accordance with the Contract Documents, the Owner, after due oral or written notice, may procure services from other sources and hold the Firm responsible for any and all costs resulting in the purchase of additional services and materials necessary to perform the Service(s). This remedy shall be in addition to any other remedies that the Owner may have.
- 2.24. Failure to Enforce:** Failure by the Owner 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 Owner to enforce any provision of the Contract Documents at any time in accordance with the terms thereof.
- 2.25. Force Majeure:** The Firm 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 Firm, unless otherwise specified in the Contract.
- 2.26. Indemnification:** Firm shall defend, indemnify and save harmless the Owner 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 Firm, or of any Firm's agent, employee, sub-Firm or supplier in the execution of, or performance under, any contract which may result from proposal award. Firm shall pay any judgment with costs which may be obtained by and/or against the Owner arising out of or under the performance.
- 2.27. Independent Firm:** The Firm 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 Owner. The Owner shall be at no time legally responsible for any negligence or other wrongdoing by the Firm, its servants, or agents. The Owner shall not withhold from the Contract payments to the Firm any federal or state unemployment taxes, federal or state income taxes, Social Security or any other amounts for benefits to the Firm. Further, the Owner shall not provide to the Firm any insurance coverage or other benefits, including Workers' Compensation, normally provided by the Owner for its employees.
- 2.28. 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 Owner reserves the right to permit the Offeror to withdraw nonconforming terms and conditions from its proposal prior to a determination by the Owner of non-responsiveness based on the submission of nonconforming terms and conditions.
- 2.29. Ownership:** All plans, prints, designs, concepts, etc., shall become the property of the Owner.

- 2.30. 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 Owner.
- 2.31. Patents/Copyrights:** The Firm agrees to protect the Owner from any claims involving infringements of patents and/or copyrights. In no event shall the Owner be liable to the Firm 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 Request for Proposal.
- 2.32. Governing Law:** Any agreement as a result of responding to this Request for Proposal 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.
- 2.33. Expenses:** Expenses incurred in preparation, submission and presentation of a response to this Request for Proposal are the responsibility of the Firm and cannot be charged to the Owner.
- 2.34. Sovereign Immunity:** The Owner specifically reserves its right to sovereign immunity pursuant to Colorado Law as a defense to any action arising out of or under a Contract.
- 2.35. Public Funds/Non-Appropriation of Funds:** Funds for payment have been provided through the Owner's budget approved by the City Council for the stated fiscal year only. Colorado law prohibits 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 Owner's fiscal year shall be subject to budget approval. The Contract will be subject to and provide a non-appropriation of funds clause.
- 2.36. 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 Owner may or may not, at its discretion, accept future proposals for the same service or commodities for participants in such collusion.
- 2.37. Gratuities:** The Firm certifies and agrees that no gratuities or kickbacks 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 Firm breaches or violates this warranty, the Owner may, at its discretion, terminate the Contract without liability to the Owner.
- 2.38. Performance of the Contract:** The Owner reserves the right to enforce the performance of the Contract in any manner prescribed by law or equity as deemed by the Owner to be in the best interest of the Owner (in the event of breach or default) of resulting Contract award.
- 2.39. Benefit Claims:** The Owner shall not provide to the Firm any insurance coverage or other benefits, including Worker's Compensation, normally provided by the Owner for its employees.

2.40. Default: The Owner reserves the right to terminate the Contract in the event the Firm fails to meet delivery or completion schedules, or otherwise perform in accordance with the Contract. Breach of contract or default authorizes the Owner to purchase like services elsewhere and charge the full cost to the defaulting Firm.

2.41. Multiple Offers: If an Offeror submits more than one offer, THE ALTERNATE OFFER must be clearly marked "Alternate Offer". The Owner reserves the right to make award in the best interest of the Owner.

2.42. Definitions:

2.42.1. "Offeror" and/or "Proposer" refers to the person or persons legally authorized by the Consultant to make an offer and/or submit a response (fee) proposal in response to the Owner's RFP.

2.42.2. The term "Services" includes all labor, materials, equipment, and/or services necessary to produce the requirements of the Contract Documents.

2.42.3. "City" is the City of Grand Junction, Colorado and is referred to throughout the Contract Documents. The term City means the City or its authorized representative. Based on such observations and the Firm's Application for Payment, the City will determine the amounts owing to the Firm and will issue Certificates for Payment in such amounts, as provided in the Contract. The City will have authority to reject Service(s) which does not conform to the Contract documents. Whenever, in his reasonable opinion, he considers it necessary or advisable to ensure the proper implementation of the intent of the Contract Documents, he will have authority to require the Firm to stop the Service(s) or any portion, or to require special inspection or testing of the Service(s), whether or not such Service(s) can be then be fabricated, installed, or completed. The City will not be responsible for the acts or omissions of the Firm, and sub-Firm, or any of their agents or employees, or any other persons performing any of the Service(s).

2.42.4. "Firm" is the person, organization, firm or consultant identified as such in the Agreement and is referred to throughout the Contract Documents. The term Firm means the Firm or his authorized representative. The Firm shall carefully study and compare the General Contract Conditions of the Contract, Specification and Drawings, Scope of Services, Addenda and Modifications and shall at once report to the Owner any error, inconsistency or omission he may discover. Firm shall not be liable to the Owner for any damage resulting from such errors, inconsistencies or omissions. The Firm shall not commence services without clarifying Drawings, Specifications, or Interpretations.

2.42.5. "Sub-Contractor is a person or organization who has a direct contract with the Firm to perform any of the services at the site. The term Sub-Contractor is referred to throughout the contract documents and means a Sub-Contractor or his authorized representative.

2.43. Public Disclosure Record: If the Offeror has knowledge of its employee(s) or sub-contractors having an immediate family relationship with an Owner employee or elected official, the Offeror must provide the Purchasing Agent with the name(s) of the individuals. The individuals are required to file a "Public Disclosure Record", a statement of financial interest, before conducting business with the Owner.

SECTION 3.0: INSURANCE REQUIREMENTS

3.1 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 the Contract. 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 the Contract 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 Sub-Contractor of the Firm to procure and maintain insurance coverage listed below. Such coverage shall be procured and maintained with forms and insurers acceptable to Owner. All coverage shall be continuously maintained to cover all liability, claims, demands, and other obligations assumed by the Firm pursuant to the Contract. 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:** Firm shall comply with all State of Colorado Regulations concerning Workers' Compensation insurance coverage.

(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, products and completed 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 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

(d) **Professional Liability & Errors and Omissions Insurance policy with a minimum of:**

THREE MILLION DOLLARS (\$1,000,000) per claim

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

With respect to each of Firm's owned, hired, or non-owned vehicles assigned to be used in performance of the Services. The policy shall contain a severability of interests provision.

- 3.2 Additional Insured Endorsement:** The policies required by paragraphs (b), and (c) above shall be endorsed to include the Grand Junction, its Elected and Appointed Officials, Employees and Volunteers are included as Additional Insured. Every required policy above shall be primary insurance, and any insurance carried by the Owner, its officers, or its employees, or carried by or provided through any insurance pool of the Owner, shall be excess and not contributory insurance to that provided by Firm. The Firm 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 professionals to provide the facilitation and creation of a two-year strategic plan for the City of Grand Junction City Council.

The Service(s) 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 2020 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 or not) 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 City Council priorities.

4.1.2 PHASE 2

4.1.2.1 Prepare and review Draft Implementation Matrix.

4.1.2.2 Identify areas in which the Draft Implementation Matrix does/does not align with City 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 City 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 the City Council and identifies alignment with the City's Comprehensive Plan and its guiding principles.

B) A final Implementation Matrix that details strategies, resources, partners, department/division leads and timeline.

4.2. Timeline: It is expected individual City Council interviews will be conducted within two weeks after the 2023 election held on April 4, 2023.

4.3. Implementation/Final Report: The completion of this project will be determined by the Firm the proposed timeline will be used as one of the evaluation criteria. A good faith estimate of when the final report can be delivered is expected.

4.4. Special Conditions/Provisions:

4.4.1 Price/Fees: Project pricing shall be all inclusive, to include, but not be limited to: labor, materials, equipment, travel, design, drawings, professional Service(s), shipping/freight, licenses, permits, fees, etc.

Provide a not to exceed cost using Solicitation Response Form found in Section 7, accompanied by a complete list of costs breakdown and rates sheets.

The Owner shall not pay nor be liable for any other additional costs including but not limited to: taxes, shipping charges, insurance, interest, penalties, termination payments, attorney fees, liquidated damages, etc.

All fees will be considered by the Owner to be negotiable.

4.4.2 Codes: The consultant shall ensure that services provided meet all Federal, State, County, and City Codes.

4.5. RFP Tentative Time Schedule:

- | | |
|---|------------------------|
| • Request for Proposal available: | January 18, 2023 |
| • Inquiry deadline, no questions after this date: | January 31, 2023 |
| • Addendum Posted: | February 3, 2023 |
| • Submittal deadline for proposals: | February 10, 2023 |
| • Owner evaluation of proposals: | February 13 – 27, 2023 |
| • Interviews (if required) | March 8, 2023 |
| • Final selection: | March 15, 2023 |
| • City Council Approval | April 5, 2023 |
| • Contract execution: | April 6, 2023 |

4.6. Questions Regarding Scope of Services:

Duane Hoff Jr., Contract Administrator
duaneh@gjcity.org

SECTION 5.0: PREPARATION AND SUBMITTAL OF PROPOSALS

Submission: *Each proposal shall be submitted in electronic format only, and only through the Rocky Mountain E-Purchasing website (<https://www.rockymountainbidsystem.com/default.asp>). This site offers both “free” and “paying” registration options that allow for full access of the Owner’s documents and for electronic submission of proposals. (Note: “free” registration may take up to 24 hours to process. Please Plan accordingly.)* Please view our “**Electronic Vendor Registration Guide**” at <https://co-grandjunction.civicplus.com/501/Purchasing-Bids> for details. (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**). For proper comparison and evaluation, the City requests that proposals be formatted as directed in Section 5.0 “Preparation and Submittal of Proposals.” 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 Owner 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/email of the person who will serve as the Firm’s principal contact person 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 Firm agrees to all requirements herein.
- B. Qualifications/Experience/Credentials:** Offerors shall provide its qualifications for consideration as a professional services provider to the City of Grand Junction and include prior experience in similar projects.
- C. Strategy and Implementation Plan:** Describe (the Firm’s) interpretation of the Owner’s objectives with regard to this Request for Proposal. Describe the proposed strategy and/or plan for achieving the objectives of this Request for Proposal. The Firm may utilize a written narrative or any other printed technique to demonstrate its 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 Request for Proposal objectives are accomplished. Include a **time schedule** for completion of Firm’s implementation plan and an estimate of time commitments from Owner staff.

Also, please include a list or organizational chart for personnel to be assigned to the project. The office of each project team member should be identified. Detailed resumes should be attached to identify the experience and qualifications of the key, individual team members. The Offeror shall describe the relevance of each key individual team member and the relevant sub-consultants (if any) and explain past relationships between the Offeror (the legally responsible entity) and each sub-consultant. Also, please describe the general Service(s) to be completed by each member of the project team. Proposed rate sheet for the Firm and any sub-consultants. Include standard markup for reimbursable expenses (travel, lodging, consumable supplies, etc.), markup for sub-consultants, and standard per-diem rates. Costs to perform the above-described scope of Service(s) on a not-to-exceed

basis broken down by key tasks presented in Section 4.0 **Specifications/Scope of Services**

- D. **References:** A minimum of five (5) **references** that can attest to Firm's experience in projects of similar scope and size. **Please also summarize the projects completed with these references including:** Client Name, Address, Contact Person, Telephone, Email Address, Project Dates, Project Description, Original Project Budget, Final Project Cost, and Explanation of variation from original budget to final project cost.
- E. **Fee Proposal:** Provide an all-inclusive, not to exceed cost using Solicitation Response Form found in Section 7.0, accompanied by a complete list of costs breakdown.
- F. **Additional Data (optional):** Provide any additional information that will aid in evaluation of Firm's qualifications with respect to this project.

SECTION 6.0: EVALUATION CRITERIA AND FACTORS

- 6.1 Evaluation:** An evaluation team will review all responses and select the proposal(s) that best demonstrate the capability in all aspects to perform the Scope of Services and possess the integrity and reliability that will ensure full faith and full performance.
- 6.2 Intent:** Only Offerors 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.

Submittal evaluations will be done in accordance with the criteria and procedure defined herein. The Owner reserves the right to reject any and all portions of proposals and take into consideration past performance. The following parameters will be used to evaluate the submittals **(with weighted values)**:

The following collective criteria shall be worth 90%
--

- | |
|--|
| <ul style="list-style-type: none"> • Responsiveness of Submittal to the RFP (10)
(Firm 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.) • Understanding of the Project and Objectives (25)
(Firm's ability to demonstrate a thorough understanding of the City's goals pertaining to this specific project.) • Experience (30)
(Firm's proven proficiency in the successful completion of similar projects.) • Strategy & Implementation Plan (25)
(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.) |
|--|

The following criteria shall be worth 10%

- | |
|--------------------|
| * Fees (10) |
|--------------------|

Owner reserves the right to take into consideration past performance of previous awards/contracts with the Owner of any vendor, Firm, supplier, or service provider in determining a final award(s), if any.

The Owner 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 Owner reserves the right to invite the most qualified rated Offeror(s) to participate in oral interviews, if needed.
- 6.4 Award:** Firms shall be ranked or disqualified based on the criteria listed in Section 6.2. The Owner reserves the right to consider all of the information submitted and/or oral presentations, if required, in selecting the project Firm.

SECTION 7.0: SOLICITATION RESPONSE FORM
RFP-5186-23-DH Strategic Planning Consultant

Offeror must submit entire Form completed, dated and signed.

- 1) All inclusive, not to exceed cost, to provide professional services for the Strategic Planning Consultant project to include, but not limited to: labor, materials, equipment, travel, licenses, permits, fees, etc. as per Scope of Services:**

Description	Onsite/Personal Meetings	Virtual Meeting Option
Phase 1		
Phase 2		
Final Report		
Not To Exceed Cost		

Not To Exceed Cost Written for Onsite/Personal Meetings:

_____ dollars

Not To Exceed Cost Written for Virtual Meeting Option:

_____ dollars

Anticipated delivery of Phase 1 _____

Anticipated delivery of Phase 2 _____

Anticipated delivery of Final Report _____

The Owner reserves the right to accept any portion of the Service(s) to be performed at its discretion

The undersigned has thoroughly examined the Request for Proposals and 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; or as accepted by the Owner.

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 they are 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 of Grand Junction 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.
- City of Grand Junction payment terms shall be Net 30 days.
- Prompt payment discount of _____ percent of the net dollar will be offered to the Owner if the invoice is paid within _____ days after the receipt of the invoice. The Owner reserves the right to consider any such discounts when determining the bid award that are no less than Net 10 days.

RECEIPT OF ADDENDA: the undersigned Firm acknowledges receipt of Addenda to the Solicitation, Specifications, and other Contract Documents. State number of Addenda received: _____

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

Company Name – (Typed or Printed)

Authorized Agent – (Typed or Printed)

Authorized Agent Signature

Phone Number

Address of Offeror

E-mail Address of Agent

City, State, and Zip Code

Date



Purchasing Division

ADDENDUM NO. 1

DATE: January 26, 2023
FROM: City of Grand Junction Purchasing Division
TO: All Offerors
RE: Strategic Planning Consultant RFP-5186-23-DH

Offerors 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 clarifications:

1. Section 4.5 RFP Tentative Time Schedule has been updated/modified to the following:

RFP Tentative Time Schedule:

- Request for Proposal available: January 18, 2023
- Inquiry deadline, no questions after this date: January 31, 2023
- Addendum Posted: February 3, 2023
- Submittal deadline for proposals: February 10, 2023
- Owner evaluation of proposals: February 13 – 27, 2023
- Interviews (if required): March 16, 2023
- Final selection: March 21, 2023
- City Council Approval: April 5, 2023
- Contract execution: April 6, 2023

2. Q. Do you have a budget in mind for the project? Or a place where I can go to identify the range?
 - A. This project has been budgeted, but is not being shared during the solicitation process.
3. Q. Do you have a preference for a local firm from within the region to complete this project? Our firm has offices in New York and Austin, and we would be available in person to conduct the engagement with staff and City Council, but want to make sure that you do not expect an on-the-ground presence in Grand Junction throughout the project timeline.
 - A. The City does not have a local preference policy. Virtual meetings for regular check-ins and planning with staff will be available, but in-person engagement would be preferred for City Council planning sessions as well as the executive leadership meeting to develop and refine the implementation matrix.

4. Q. We noticed that your scope of work does not include any research. Would you be open to the addition of a research phase in order to better understand the city's assets and opportunities?
 - A. It's unclear what a research phase would entail but research should be focused on understanding the input that has already been gathered in the 2020 Comprehensive Plan. Any additional information about the city's assets can be provided to the consultant as needed.
5. Q. We noticed that the scope of work also does not include stakeholder engagement with community members. What are your thoughts on this?
 - A. The Strategic Plan is informed by the 2020 Comprehensive Plan, which included extensive stakeholder and community engagement. Strategic plan development will only require direct engagement with City Council and City staff.
6. Q. What is an approximate timeline that you have in mind for this engagement?
 - A. A detailed timeline will be agreed upon between the City and the consultant after selection.
7. Q. What is the total allotted budget for the project?
 - A. See response to Question 2.
8. Q. Is there a budget or budget range for this project, and if so, are you able to share that with us?
 - A. See response to Question 2.
9. Q. Has the City established a not-to-exceed budget for this project? If so, can that amount be shared?
 - A. See response to Question 2.
10. Q. Does the City wish to include any public engagement and outreach and/or stakeholder participation outside of the City Council and executive leadership staff as identified in the RFP?
 - A. The Strategic Plan is informed by the 2020 Comprehensive Plan, which included extensive stakeholder and community engagement. Strategic plan development will only require direct engagement with City Council and City staff.
11. Q. Approximately how many staff make up the executive leadership team?
 - A. There are 13 Department Directors, plus the City Manager and the City Attorney. In total, over 20 staff members are expected to be a part of the staff planning session.
12. Q. Has the City recently done any type of community and/or customer satisfaction surveys? If so, are these surveys done regularly? If not, would the City like contractors to include a survey in their proposals?

A. Surveys are completed on a bi-annual basis. The most recent community survey was completed in December 2022. Results have been received and may be shared with the selected consultant.

13.Q. In Section 4.2 the City has identified a timeline for conducting City Council interviews within two weeks of the 2023 election on April 4th. In Section 4.5, contract execution with the selected vendor is anticipated to be April 6th. Is the City flexible with the two-week timeline established in Section 4.2 given the need for project planning and initiation following contract execution?

A. Deviations from the timeline may be agreed upon with the consultant after selection. However, it is preferred that Council interviews are completed as closely within the outlined timeline as possible.

14.Q. Would the City like for contractors to propose elements of executive leadership training, coaching and/or organizational assessment recommendations to align with and support the activities described in Section 4.1.1.5?

A. The purpose of the 2-3 hour workshop session with Councilmembers, City Manager and the City Attorney indicated in Section 4.1.1.5 will be to facilitate and agree upon expectations. Any proposed elements that will directly facilitate this discussion are welcome but will be subject to review and agreement.

B.

15.Q. Is the City open to contractors proposing methods and best practices that may deviate from, but incorporate all elements of, the activities outlined in Section 4.1?

A. The two expected final products will include a written Strategic Plan that outlines City Council's priorities over the next two years, and an Implementation Matrix outlining planned projects that will result in achievement of strategic plan priorities. Minor deviations or changes to better align with best practice will be considered.

16.Q. What are your expectations for the 'Final Report' (Sec. 4.3)? Is it what is detailed in 4.1.2.4?

A. The final report refers to the two final products, the Strategic Plan and Implementation Matrix as outlined in section 4.1.2.4.

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

All other conditions of subject remain the same.

Respectfully,



Duane Hoff Jr., Contract Administrator
City of Grand Junction, Colorado



Purchasing Division

ADDENDUM NO. 2

DATE: February 7, 2023
FROM: City of Grand Junction Purchasing Division
TO: All Offerors
RE: Strategic Planning Consultant RFP-5186-23-DH

Offerors 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 clarifications:

1. Q. How is the City of Grand Junction defining 'implementation matrix?'
 - A. The implementation matrix is defined as a companion document to the strategic plan that will encapsulate the activities, projects, resources, responsible departments, and partners that will be necessary to carry out the goals and priorities outlined by the strategic plan. The matrix is envisioned as a tool that can be regularly updated by staff to reflect progress made toward achieving strategic priorities.
2. Q. §4.1.1.2: Do questions for the Council Member interviews need to be approved, and, if so, by whom?
 - A. Question development for Council interviews is anticipated to be a collaborative process with the selected consultant and City staff.
3. Q. §4.1.1.2: In addition to the City's 2020 Comprehensive Plan, do you currently have vision and goals in place for the Grand Junction City Council, or are you looking to develop them as part of this strategic plan?
 - A. In addition to the 2020 Comp Plan, City Council's current strategic plan priorities include Mobility, Economic Development, Housing, Public Safety, and Quality of Life & Resource Stewardship. Changes or updates to the goals, priorities, etc. are expected to emerge through City Council interviews and workshops during the strategic planning process.
4. Q. §4.2: The RFP indicates that the "individual City Council interviews will be conducted within two weeks after the 2023 election held on April 4, 2023." To clarify, do you expect that the interviews to start within that time or that interviews with all seven Council Members will be completed within those two weeks?

- A. The process for scheduling these interviews should begin within two weeks post-election. Interviews with City Council members are expected to be completed as schedules allow.
5. Q. Can you share a budget or anticipated price range for this work based on either previous efforts or appropriations set aside for 2023?
- A. See response to question 2 of Addendum 1.
6. Q. Is there a deadline for when you need the Strategic Plan and Implementation Matrix to be completed or dependencies in the timeline about which we should be aware?
- A. Tentatively, staff would like to bring the final product to City Council for approval by August 2023.
7. Q. Do you expect a financial budget to be created as a component of the Strategic Plan?
- A. No, budgeting toward strategic plan priorities will be an internal staff process.
8. Q. Are you looking to gather input from Community Partners or the community to support the strategic plan?
- A. The Strategic Plan is informed by the 2020 Comprehensive Plan, which included extensive stakeholder and community engagement. Strategic Plan development will only require direct engagement with City Council and City Staff.
9. Q. Will a hybrid of in-person and remote work be agreeable?
- A. Virtual meetings for regular check-ins and planning with staff will be available, but in-person engagement would be preferred for City Council planning sessions as well as the executive leadership meeting to develop and refine the implementation matrix.
10. Q. How do you use, track, and/or report on Strategic Plan Success Metrics (Ref. 2019 Strategic Plan) today?
- A. The City utilizes an implementation matrix created as a component of the Strategic Plan completed in 2021 to document project progress, resources, lead departments and partners. This matrix informs progress that has been made toward achieving current Council priorities.

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

All other conditions of subject remain the same.

Respectfully,



Duane Hoff Jr., Contract Administrator
City of Grand Junction, Colorado



City of Grand Junction

Strategic Planning Consultant

RFP 5186-23-DH / FEBRUARY 10, 2023



Table of Contents



Making our world better

The Raftelis Charitable Gift Fund allocates profits, encourages employee contributions, and recognizes time to charitable organizations that support:

- Access to clean water and conservation
- Affordability
- Science, technology, and leadership

Raftelis is investing in improved telecommunication technologies to reduce the firm's number one source of carbon emissions—travel.



Diversity and inclusion are an integral part of Raftelis' core values.

We are committed to doing our part to fight prejudice, racism, and discrimination by becoming more informed, disengaging with business partners that do not share this commitment, and encouraging our employees to use their skills to work toward a more just society that has no barriers to opportunity.

Firm Overview..... 1

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Project Team Error! Bookmark not defined.

Experience ... Error! Bookmark not defined.

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Exceptions ... Error! Bookmark not defined.

Appendix: Resumes .. Error! Bookmark not defined.

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COVER LETTER

February 10, 2023

Mr. Duane Hoff Jr.
Contract Administrator
City of Grand Junction
250 North 5th Street
Grand Junction, CO 81501

Subject: Proposal for Strategic Planning Consultant (RFP 5186-23-DH)

Dear Mr. Hoff Jr.:

We are pleased to submit this proposal to provide the City of Grand Junction (City) with strategic planning consultant services. We are dedicated to providing management consulting services, including strategic planning facilitation, to local governments with a focus on helping local government clients solve their financial, organizational, and technology challenges.

We believe our firm offers the City some distinct advantages in the creation of an updated strategic plan:

- **A workable and insightful approach:** Our team's approach specifically addresses the City's needs and will help develop a best practice-level strategic planning process and resultant two-year plan with significant engagement of the City Council, City Manager, City Attorney, and key staff. Our proven methods of strategic planning and facilitation will lead to a sustainable plan that provides the City with an update to the strategic plan and an implementation matrix to monitor forward progress.
- **Use of unique and innovative tools and techniques:** We are passionate about strategic planning, which drives us to use innovation and creativity throughout the project, from engagement to the preparation of the final plan. We encourage future-focused discussions and action-oriented approaches to building the City's plan. Our facilitators are skilled at flexibly managing the discussion to ensure they are productive. Our deliverables are useful and engaging, and unique and creative graphics are used to keep documents concise with a focus on internal and external communication. Our visual facilitator can ensure a shared understanding of key concepts by translating discussions into graphic form live during our meetings.
- **Personal service from senior-level consultants:** You appreciate it when deadlines are met, phone calls are returned, and your challenges are given in-depth, out-of-the-box thinking. While some firms may assign your business to junior-level people, we offer exceptional service from senior-level consultants.

We have had significant success working with community members, elected officials, department leadership teams, and staff to identify priorities for an organization or community to achieve consensus and improve governance. We

are confident our approach will provide the City with the direction it seeks for the future of the Grand Junction community.

We look forward to the opportunity to serve you. Please contact me using the information below should you have any questions.

Sincerely,

A handwritten signature in black ink, appearing to read "Julia Novak". The signature is fluid and cursive, with the first name "Julia" and last name "Novak" clearly distinguishable.

Julia Novak

Executive Vice President

Phone: 513.221.0500 / Email: jnovak@raftelis.com

QUALIFICATIONS/EXPERIENCE/CREDENTIALS

Who We Are

RAFTELIS AND THE NOVAK CONSULTING GROUP, HELPING LOCAL GOVERNMENTS AND UTILITIES THRIVE

Local government and utility leaders partner with Raftelis to transform their organizations by enhancing performance, planning for the future, identifying top talent, improving their financial condition, and telling their story. We've helped more than 600 organizations in the last year alone. We provide trusted advice, and our experts include former municipal and utility leaders with decades of hands-on experience running successful organizations. People who lead local governments and utilities are innovators—constantly seeking ways to provide better service to the communities that rely on them. Raftelis provides management consulting expertise and insights that help bring about the change that our clients seek.

TNCG is Now Raftelis

The Novak Consulting Group (TNCG) and Raftelis have always shared a focus on delivering lasting solutions for local government agencies. In January 2020, TNCG joined Raftelis. Today, we provide our clients with wide-ranging capabilities and resources in financial, management, technology, and communications consulting for all areas of local government. Our clients now have the expertise of more than 140 of the country's leading local government and utility consultants, who have decades of experience. We know that our combined capabilities and resources will provide added value to our clients, and we're excited about what we can accomplish together.

We believe that Raftelis is the *right fit* for this project. We provide several key factors that will benefit the City and help to make this project a success.

RESOURCES & EXPERTISE: Our project team is passionate about strategic planning and organizational optimization. Each member of our team specializes in strategic planning and has devoted their careers to assisting with local government strategic planning.

DECADES OF COLLECTIVE EXPERIENCE: Our associates and subject matter experts have decades of experience in strengthening local municipalities and utilities. They've served in a wide range of positions, from city manager to utility director, and they have led dozens of strategic planning initiatives for utilities across the country.

PERSONAL SERVICE FROM SENIOR-LEVEL CONSULTANTS: You appreciate it when deadlines are met, phone calls are returned, and your challenges are given in-depth, out-of-the-box thinking. While other firms may assign your business to junior-level people, our approach provides exceptional service from senior-level consultants.

NICHE EXPERTISE: Our expertise lies in strengthening public-sector organizations. We're consulting specialists rather than generalists, focusing our strengths to do a highly effective job for a specific group of clients.

PROVEN PROCESS: We will implement a proven and unique facilitation process that engages internal and external stakeholders, links strategy to performance, and sets the organization up for effective implementation. We will use several techniques, some of which are innovative and others that are more classic approaches.

29 years
serving local
governments
and utilities

How we stack up

OUR TEAM INCLUDES

140+ consultants focused on
finance/management/communication/
technology for local governments and utilities

RAFTELIS HAS PROVIDED ASSISTANCE FOR

1,200+ local governments
and utilities

that serve more than

25% of the
U.S. population

including the agencies serving

38 of the nation's
50 largest cities

in the past year alone, we worked on

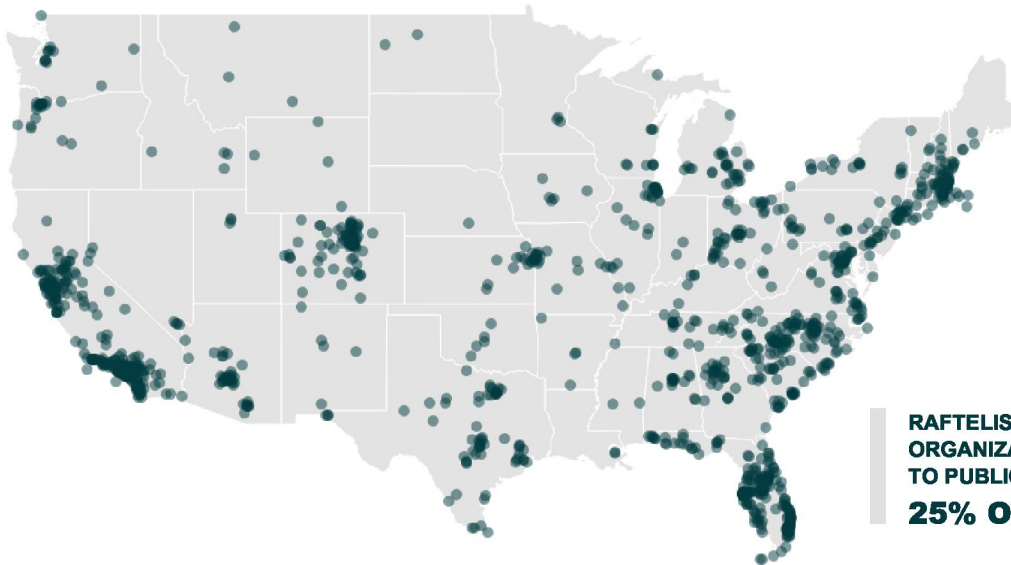
1,000+ projects for **600+** agencies in **46** states

QUALIFICATIONS/EXPERIENCE/CREDENTIALS

Experience

RAFTELIS HAS ONE OF THE MOST EXPERIENCED LOCAL GOVERNMENT FINANCIAL AND MANAGEMENT CONSULTING PRACTICES IN THE NATION.

Our staff has assisted more than 1,200 local government organizations across the U.S., including some of the largest and most complex agencies in the nation. In the past year alone, Raftelis worked on more than 1,200 strategic planning, financial, management, and/or technology consulting projects for over 600 public-sector agencies in 46 states, the District of Columbia, and Canada. Our team has extensive experience with strategic planning throughout the country. Our clients tell us we are more than just consultants—we are trusted advisors. We point to a strong repeat customer base as part of the evidence, as well as the many clients who have hired us numerous times to do vital work for their organizations. Other clients have told us that our contacts are “enthusiastic” when providing a reference to potential clients, and they point to actionable and practical solutions.



RAFTELIS HAS PROVIDED FINANCIAL/
ORGANIZATIONAL/TECHNOLOGY ASSISTANCE
TO PUBLIC AGENCIES SERVING MORE THAN
25% OF THE U.S. POPULATION.

National Experience

This matrix shows some of the communities throughout the U.S. that Raftelis/TNCG staff has assisted and the services performed for these clients.

Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation
AL Birmingham Water Works Board	●		●
AK Municipality of Anchorage	●		
AR Central Arkansas Water	●		●
AR El Dorado	●		
AR Little Rock Wastewater	●		
AZ Alliance for Innovation			●
AZ Avondale			●
AZ Bullhead	●		
AZ Central Arizona Project			●
AZ Clarkdale		●	
AZ Cottonwood		●	
AZ Goodyear			●
AZ Oro Valley		●	
AZ Payson		●	
AZ Peoria		●	
AZ Scottsdale		●	
AZ Sierra Vista			●
AZ Yuma		●	●
CA California City	●		
CA Central Contra Costa Sanitary District	●		
CA Delta Diablo Sanitation District	●		
CA Fullerton	●		
CA Gilroy	●		
CA Hanford			●
CA Hayward			●
CA Hollister	●		
CA Huntington Beach	●		
CA Los Angeles	●		
CA Long Beach Transit Authority	●		
CA Manhattan Beach			●
CA Malibu	●		
CA Monte Vista Water District	●		
CA Oceanside	●		
CA Oceanside Water Utilities			●
CA Palo Alto			●
CA Placer County			●
CA Roseville			●
CA Sacramento Area Sewer District/Sacramento Regional County Sanitation District			●
CA San Gabriel	●		
CA San Luis Obispo			●
CA San Marino			●
CA Santa Ana Watershed Project Authority	●		
CA Santa Barbara	●		●

Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation
CA Seaside			●
CA Yountville			●
CO Adams County			●
CO Aspen	●	●	●
CO Aurora	●		●
CO Boulder	●	●	●
CO Boulder County	●		
CO Brighton			●
CO Centennial	●		●
CO Denver Metro Water Recovery	●		
CO Denver Wastewater	●		
CO Elbert County	●		
CO Erie			●
CO Evans			●
CO Fort Collins	●	●	●
CO Golden			●
CO Greeley	●		
CO Health District of Northern Larimer County		●	
CO La Plata County	●		
CO Lafayette		●	●
CO Louisville	●	●	●
CO Loveland		●	
CO Metro Water Reclamation District			●
CO Northglenn		●	
CO Pueblo West Metropolitan District		●	
CO Routt County			●
CO Thornton			●
CO Timnath			●
CO Westminster		●	●
CO Windsor	●		●
CT Connecticut Town & City Management Association	●		
CT Enfield	●		
CT Greenwich		●	
CT Groton	●		
CT Manchester	●		●
CT Mansfield	●	●	
CT Meriden		●	
CT Windsor		●	
DC DC Water			●
DC District of Columbia Department of Public Works			●
DC International City/County Management Association	●		●
DC National League of Cities	●		
DC USAID - Moldova	●		

Client		Organizational Assessment	Executive Search	Strategic Plan Facilitation
DE	Kent County		●	
DE	Lewes		●	
DE	Milford		●	
DE	Milton		●	
DE	Rehoboth Beach		●	
DE	Wilmington	●		●
DE	Wilmington Utilities	●		●
FL	Deerfield Beach			●
FL	Palmetto Bay			●
FL	Palmetto County	●		
FL	Pinellas County	●		
FL	Pompano Beach Utility Department	●		
FL	Sanford			●
FL	Tampa Water Department	●		●
FL	Winter Haven	●		
GA	Decatur			●
GA	Roswell			●
IA	Cedar Rapids	●	●	
IL	Carbondale	●		
IL	DuPage County	●		
IL	Evanston	●		
IL	Geneva			●
IL	Gurnee			●
IL	Lisle			●
IL	Peoria County		●	
IL	Schaumburg	●		
IL	Warrenville	●		
IL	Woodridge			●
IN	Bloomington	●	●	
IN	Indianapolis	●		
IN	Monroe County	●		
IN	Munster	●		●
KS	Baldwin City		●	●
KS	Bonner Springs	●		
KS	Edgerton		●	
KS	Edwardsville			●
KS	Eudora			●
KS	Garden City	●		
KS	Gardner			●
KS	Hutchinson	●		
KS	Johnson County		●	●
KS	Lawrence			●
KS	Merriam		●	

Client		Organizational Assessment	Executive Search	Strategic Plan Facilitation
KS	Olathe	●		●
KS	Roeland Park			●
KS	Saline County			●
KS	Shawnee	●		●
KS	Tonganoxie		●	●
KS	United Government of Wyandotte County & Kansas City			●
KS	Water District No. 1 Johnson County (WaterOne)			●
KY	Lexington-Fayette Urban County Government	●		
KY	Louisville Water Company	●		
KY	Paducah			●
KY	Sanitation District #1 of Northern Kentucky			●
LA	New Orleans	●		
LA	Orleans Parish School Board		●	
LA	Sewerage & Water Board of New Orleans			●
MA	Franklin County	●		
MA	Lexington			●
MA	Methuen	●		
MA	Nantucket	●		●
MA	Pioneer Valley Planning Commission	●		
MA	Sherborn	●		
MA	Shrewsbury			●
MA	Westborough	●		●
MD	Aberdeen	●	●	●
MD	Baltimore Department of Public Works	●		●
MD	Berwyn Heights		●	
MD	Cambridge		●	
MD	Charles County		●	
MD	College Park	●		●
MD	Gaithersburg		●	●
MD	Garrett Park		●	
MD	Greenbelt	●		●
MD	La Plata		●	●
MD	Maryland Municipal League	●		
MD	Maryland State Judiciary			●
MD	Mount Rainier	●	●	
MD	New Carrollton		●	
MD	Ocean City			●
MD	Ocean Pines Association		●	
MD	Riverdale Park		●	
MD	Rockville	●	●	●
MD	St. Michaels		●	
MD	Sykesville		●	
MD	Takoma Park		●	

Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation
MD Talbot County	●		
MD University Park			●
MD Westminster		●	●
MD Worcester County			●
MI Ada			●
MI Ann Arbor		●	●
MI Ann Arbor Transportation Authority			●
MI Canton Township	●		
MI Ferndale			●
MI Holland	●		
MI Jackson County			●
MI Midland			●
MI Midland Community Foundation			●
MI Novi		●	●
MI Oakland County		●	
MI Rochester Hills	●	●	
MI Royal Oak			●
MI Saline	●		
MI Three Rivers	●		
MN Cloquet	●		
MN Edina	●		
MN Lake Elmo	●		
MN Minnesota Municipal League	●		
MN Northfield	●		
MO Chesterfield		●	
MO Clayton		●	●
MO Lee's Summit	●	●	●
MO Maryville			●
MO Metropolitan St. Louis Sewer District	●		
MO Missouri Municipal League			●
MO North Kansas City			●
MO Parkville			●
MO Platte City	●		
MO Sikeston			●
MO St. Joseph			●
MO St. Louis County			●
MO University City			●
MO Wentzville			●
MT Helena		●	
NC Albemarle			●
NC Asheville	●		
NC Brevard			●
NC Brunswick	●		

Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation
NC Cary			●
NC Charlotte	●		
NC Charlotte Water			●
NC Creedmoor	●		
NC GoTriangle Transit	●		●
NC Greensboro	●		
NC Guildford County	●	●	
NC Harnett County			●
NC High Point		●	
NC Lowell			●
NC Onslow Water & Sewer Authority (ONWASA)			●
NC Orange County	●		
NC Orange Water and Sewer Authority			●
NC Raleigh	●		●
NC Raleigh Public Utilities Department	●		
NC Rolesville	●	●	
NC Swansboro			●
NC Wake County	●		●
NC Wake Forest			●
NC Wilmington	●		
NC Winston-Salem			●
NC Winston-Salem/Forsyth County Utilities			●
NC Zebulon			●
ND Minot			●
NE Hastings	●		
NE La Vista	●		
NE Lincoln	●		
NE Reno	●		
NH Hanover		●	
NH Keene		●	
NJ Jersey Water Works	●		
NJ New Jersey Health Initiative	●		
NM Las Cruces		●	
NY Batavia		●	
NY Edgemont	●		
NY Ithaca	●		
NY Oneonta		●	
NY Rochester	●		
NY Wainscott	●		
OH Beaver Creek Township	●		
OH Blendon Township			●
OH Blue Ash	●		●
OH Centerville		●	

Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation
OH Cincinnati	●		●
OH Clearcreek Township	●		●
OH Cleveland Heights	●	●	●
OH Dayton	●	●	
OH Delaware	●		
OH Delaware County		●	●
OH Delaware County EMS			●
OH Dublin	●	●	●
OH Eastgate Regional Council of Governments	●		
OH Franklin County	●		
OH Gahanna	●		●
OH Georgetown			●
OH Granville		●	
OH Greater Cincinnati Water Works			●
OH Greene County	●		
OH Hilliard		●	●
OH Hudson		●	
OH Jackson Township		●	
OH Miami Township		●	
OH Miami University	●		
OH Miami Valley Risk Management Authority			●
OH Montgomery County Environmental Services	●		●
OH Monroe			●
OH Moraine		●	
OH National Association of State & Local Equity Funds			●
OH Newark	●		
OH Oberlin	●	●	●
OH Ohio City/County Management Association	●		●
OH Owens-Corning			●
OH Piqua			●
OH Portsmouth		●	
OH Powell			●
OH Prairie Township		●	
OH Preservation Parks of Delaware County			●
OH Sandusky		●	
OH Sharonville			●
OH Solid Waste Authority of Central Ohio (SWACO)	●	●	
OH Solon	●		
OH The Port, an Ohio Port Authority	●	●	●
OH Toledo			●
OH Troy	●		
OH Union County		●	
OH Upper Arlington		●	●

Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation
OH Washington Township	●	●	●
OH West Chester Township		●	
OH Westerville		●	●
OH Worthington	●	●	●
OH Xenia	●		
OK Lawton	●		
OK Norman	●		
OR Beaverton		●	●
OR Bend			●
OR Gresham		●	●
OR Hillsboro		●	●
OR Hood River		●	
OR Lane County		●	
OR Newberg		●	
OR Salem	●	●	●
OR Tigard		●	
OR Tualatin Hills Park & Recreation District		●	
OR Washington County	●	●	●
OR Wilsonville	●		●
PA Allentown	●		
PA Association for Pennsylvania Municipal Management (APMM)			●
PA Bethel Park	●		
PA Breakneck Creek Regional Authority		●	
PA Capital Region Water			●
PA Carlisle Borough		●	
PA Duquesne	●		
PA East Buffalo	●		
PA East Whiteland Township	●		
PA Exeter Township	●		
PA Farrell	●	●	
PA Ford City Borough	●		
PA Harrisburg	●		
PA Hazleton	●		
PA Lancaster County	●		
PA Lehigh County Authority			●
PA Lewisburg	●		
PA Lower Paxton Township			
PA Nanticoke	●		
PA Pittsburgh Water & Sewer Authority	●		●
PA Reading	●		
PA St. Marys	●		
PA State College			●
RI Westerly	●		

Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation
SC Charleston	●		
SC Hilton Head			●
SC Mount Pleasant Waterworks			●
SC Renewable Water Resources (ReWa)	●		
TN Farragut			●
TN Johnson City	●		
TN Metro Government of Nashville and Davidson Co.	●		
TN Metro Water Services of Nashville and Davidson County	●		●
TX Abilene		●	
TX Allen			●
TX Austin	●		●
TX Brownsville Public Utilities Board			●
TX Cedar Hill			●
TX Cedar Park	●		
TX Dallas			●
TX Lancaster		●	●
TX Laredo			●
TX League City			●
TX North Texas Municipal Water Department			●
TX Pearland	●		●
TX Plano			●
TX Prosper			●
TX Sugar Land			●
TX Temple			●
TX The Woodlands	●		●
TX University Park		●	●
UT Murray			●
UT South Jordan			●
VT Burlington Water Resources	●		
VT Montpelier			●
VA Albemarle County		●	●
VA Alexandria		●	
VA Appomattox River Water Authority	●		
VA Arlington County		●	
VA Ashland		●	
VA Bedford County		●	
VA Charlottesville	●		
VA Fairfax		●	
VA Fairfax County		●	
VA Fairfax County Water Authority			●
VA Fairfax Water	●		
VA Fredericksburg	●		

Client	Organizational Assessment	Executive Search	Strategic Plan Facilitation
VA Gloucester County	●		
VA Hampton			●
VA Harrisonburg		●	
VA Leesburg		●	
VA Loudoun County	●	●	
VA Newport News		●	
VA Newport News Waterworks			●
VA Prince William County		●	
VA Purcellville	●		
VA Rivanna Water & Sewer Authority			●
VA Suffolk	●		
VA Vienna			●
VA Virginia Beach			●
VA Virginia Retirement System		●	
VA Warrenton	●	●	
VA Washington County Service Authority			●
WA Bellevue	●		●
WA Bothell	●		●
WA Camas	●	●	
WA Central Piece Fire and Rescue		●	
WA Mercer Island			●
WA Richland			●
WA Sammamish		●	
WA Sequim	●		●
WA Shoreline	●	●	
WA Spokane Regional Health District		●	
WA Sudden Valley Community Association		●	
WA Sunrise Water Authority		●	
WI Eau Claire			●
WI Central Brown County Water Authority		●	
WI Green Bay/Central Brown County	●		
WI Mequon		●	
WI Milwaukee Metropolitan Sewerage District			●
WI Oak Creek			●
WI Shorewood	●		
WI Washington County			●
WI Wauwatosa	●		
WV Monongalia County			●
WV Morgantown		●	●
WY Sheridan			●
PR Puerto Rico Aqueduct & Sewer Authority (PRASA)	●		

STRATEGY AND IMPLEMENTATION PLAN:

Strategy and Implementation Plan:

At its best, strategic planning engages individuals and strengthens a sense of community that undergirds strong civic engagement. Tapping individuals who are content, and even perhaps apathetic, creates new leaders for the future and energizes people in a positive way toward their local government. We believe that communities function best when there is engagement during *good* times, not just when people oppose something. By creating constructive dialogue, the community is much more likely to react productively and civilly when something occurs that might otherwise bring out nonproductive forms of engagement.

We understand the unique roles of each stakeholder. Each participant in this process comes with a different perspective and, perhaps, conflicting priorities. Each of these viewpoints is important and valuable. It is our responsibility to work in partnership with the City to synthesize this information and facilitate a process that does the following:

- Honors and respects the diversity of opinions of participants
- Promotes group communication and collaboration through inclusivity and community building
- Provides useful information and direction for decision making and priority setting

Effective and efficient project management will be critical for ensuring the successful completion of this engagement. Therefore, our approach is to work collaboratively with the City to ensure all expectations are articulated from the start. We remain in close contact with our clients throughout all phases of each engagement to ensure these expectations are met. This also allows us to quickly address any contingencies that may arise. Our experience with similar work enables us to hit the ground running.



A strategic planning process involves several steps:

- Articulating a clear vision for the community and mission for the organization
- Preparing an environmental scan that identifies the factors affecting the community and organization
- Establishing goals
- Identifying priority strategies
- Creating implementation plans that become the focus of activity long after the process itself has finished

The process of developing a strategic plan explores three specific questions:

- What do we know to be true? – *Who are we?*
- What do we hope will be true in the future? – *Where are we going?*
- What must go well in order to make it so? – *How are we going to achieve it?*

In this way, a strategic plan is a roadmap to move a community toward its intended vision.

Scope of Work

THE FOLLOWING OUTLINES OUR PROPOSED SCOPE OF WORK FOR DEVELOPING A STRATEGIC PLAN FOR GRAND JUNCTION.

Phase 1: Develop the Strategic Plan Framework

A successful process will benefit from a collaborative relationship between the consulting team and City from the very beginning of the process. This task is intended to begin building that relationship.

At the start of this engagement, we will request and review all background information, including all other planning documents, resource materials, and other relevant data. Next, we will meet with the City's project team to gain a clear picture of what the City hopes to accomplish from this process. We will discuss communication and engagement strategies for the project. We want to ensure that we have a shared understanding of how to develop the plan and successfully integrate the learnings from the City's prior 2020 Strategic Plan. We will review the project plan and finalize the timelines and schedule with the City.

We will work collaboratively with the City to develop an Environmental Scan, which will provide helpful background information about the current state of the City and potential future impacts. As part of this process, we will conduct individual interviews with each member of the City Council to gain their input on the process and on the City's strengths, weaknesses, opportunities, and challenges. We will also discuss the 2020 Strategic Plan and any upcoming initiatives that should be considered in the strategic planning process.

To finalize the Environmental Scan, we will gather existing data about the community, such as financial trends, demographic data, statistics about housing, business, and jobs, and other relevant information. All information received will be incorporated into the Scan.. Our team will review all relevant City documents and data, and we will identify areas in which the goals of individual Council members align with the adopted One Grand Junction



A sample of the work of our visual facilitator and an overview of the strategic planning process

Comprehensive Plan's vision and resulting five strategic priorities. We will review all input and identify common themes and focus areas that have arisen.

In order to establish shared expectations for a high-functioning government, Raftelis will develop and facilitate a 2-3 hour Governance Workshop with the City Council, City Manager, and City Attorney. We have facilitated similar sessions in other municipalities nationwide and will discuss what good governance looks like, being in the majority or minority of a vote, what productive relationships with colleagues look like, and more. The Workshop will be thoughtful and interactive, with active engagement of all participants. We will provide a summary of Workshop results to the City.

Based on our conversations with the City, we will prepare a draft agenda for a 6-8 hour Strategic Planning Workshop to be reviewed by the City. We will then facilitate the Workshop with the City Council and key staff to articulate a desired future for the community. The Environmental Scan will be reviewed to provide foundational context for the vision and goals. The current organizational mission, vision, values, and goals will be reviewed and affirmed or changed.

The session will include activities with the entire group as well as small group breakout sessions that will allow everyone to actively participate and engage in the process. During the session, the primary role of the facilitator is to ensure that the environment is respectful and conducive to open and constructive dialogue so that the established objectives are ultimately met. While the agenda provides the structure to accomplish the tasks, we also know how important it is to pay attention to the group and make sure that conversations that need to happen actually happen, so we are flexible and in tune with the group during the process.

We will prepare and review the draft strategic plan framework with the City, perform follow-up and revision as necessary based upon feedback received, and finalize the strategic plan framework.

DELIVERABLES:

- Kick-off meeting agenda
- Draft and final project schedule
- Draft and final Environmental Scan
- Governance Workshop agenda and summary
- Strategic Plan Workshop agenda
- Strategic Plan Framework

Phase 2: Develop Strategies and Deliverables

Achievement of the strategic plan will rest upon successful implementation. To assist the City, Raftelis will prepare and provide a draft Implementation Matrix for use in tracking implementation. When completed, the Matrix will include all identified goal areas, the specific strategic to support them, and information on resources required, person accountable, timelines, and more. We will develop the draft Implementation Matrix and review with the City.

As we work on the Implementation Matrix, our team will identify areas in which goals and strategies identified for the strategic plan do not align with the City Council high-level goals and priorities, particularly those expressed in the Comprehensive Plan.

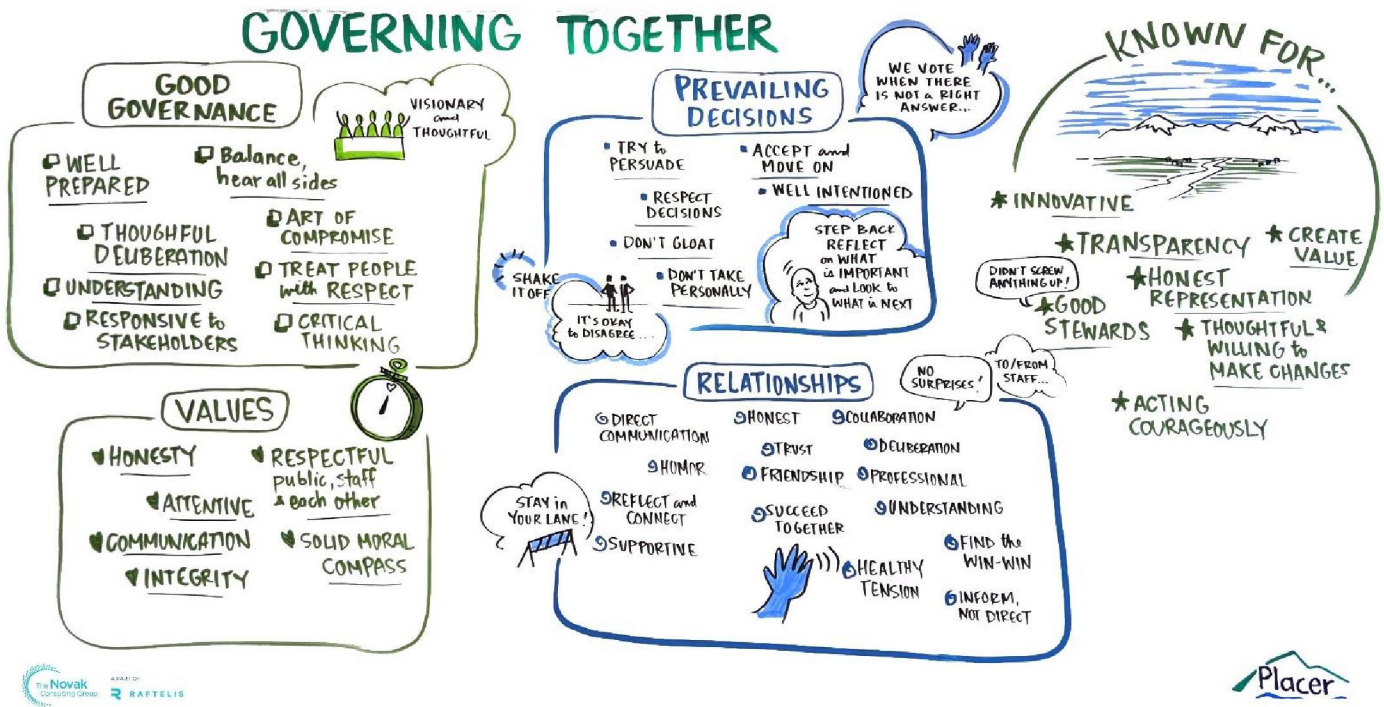
In order to populate the Implementation Matrix, Raftelis will hold a Strategy Workshop with City executive leadership and key staff members. We will engage with staff to develop specific strategies to support City Council

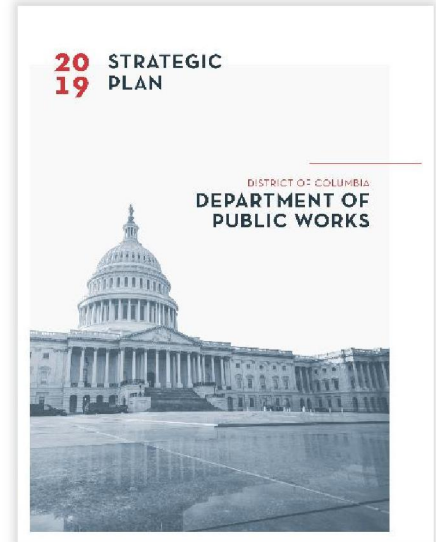
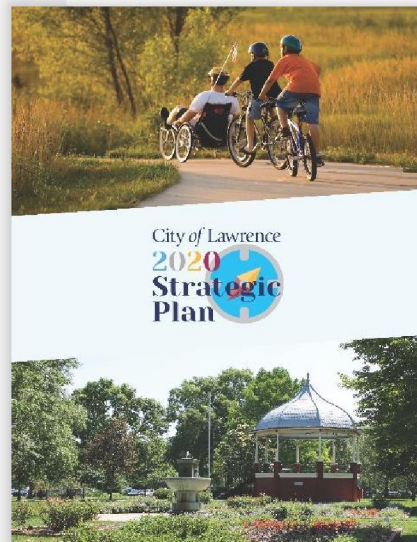
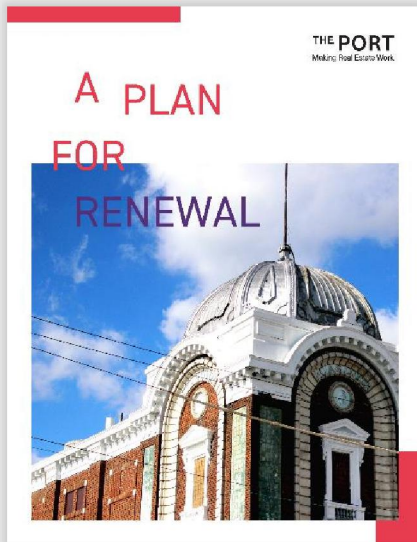
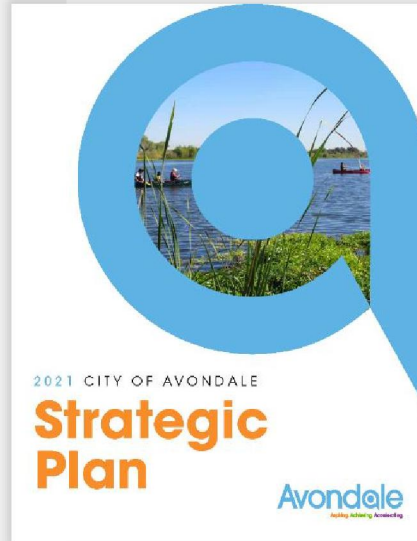
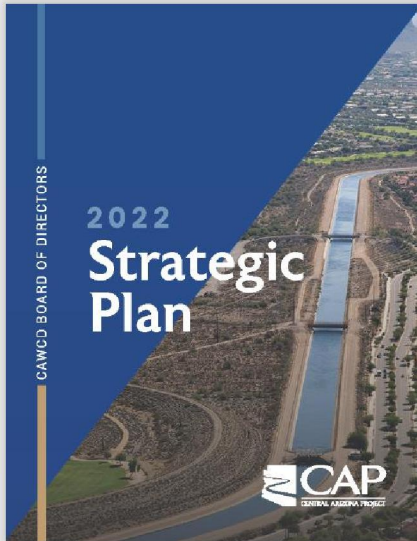
goals and to refine the Draft Implementation Matrix itself. Again, we will facilitate an interactive sessions which includes both large and small-group activities. The Implementation Matrix serves as a valuable tool to allow the organization, the City Council, and the community to track progress toward achievement of the strategic plan vision.

Once the Implementation has been completed, Raftelis will prepare a comprehensive deliverable that includes the Environmental Scan (including summary of input summarized by themes), the process methodology, the City’s new two-year strategic plan, and the Implementation Matrix. We will review the draft deliverables with the City and make any necessary changes or modifications before finalization. Deliverables will also include a summary document which summarizes the strategic plan framework in graphic form for ease of publishing on the City’s website and sharing with the public.

DELIVERABLES:

- Draft and Final Implementation Matrix
- Strategy Workshop Agenda
- Draft and Final Strategic Plan, Report, and Summary Document



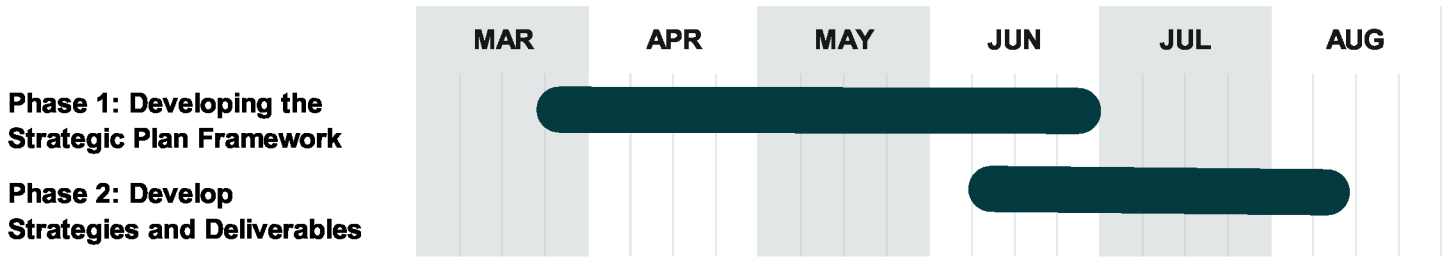


The strategic plan that we will develop for the City won't be just another report to sit on your shelf. Our team of strategic planning experts and graphic designers develop plans that serve as tools to graphically communicate the organization's vision to both internal and external stakeholders.

Shown here are the front covers of several strategic plans that Raftelis has recently developed and designed.

Timeline

A draft timeline is included. We expect to refine this with the City during the Phase 1 Kick-off Meeting.



We recognize that City staff already have a full work plan outside of this project. We attempt to be as efficient as possible to minimize impacts on the use of staff time.

City staff time will be required for the following tasks:

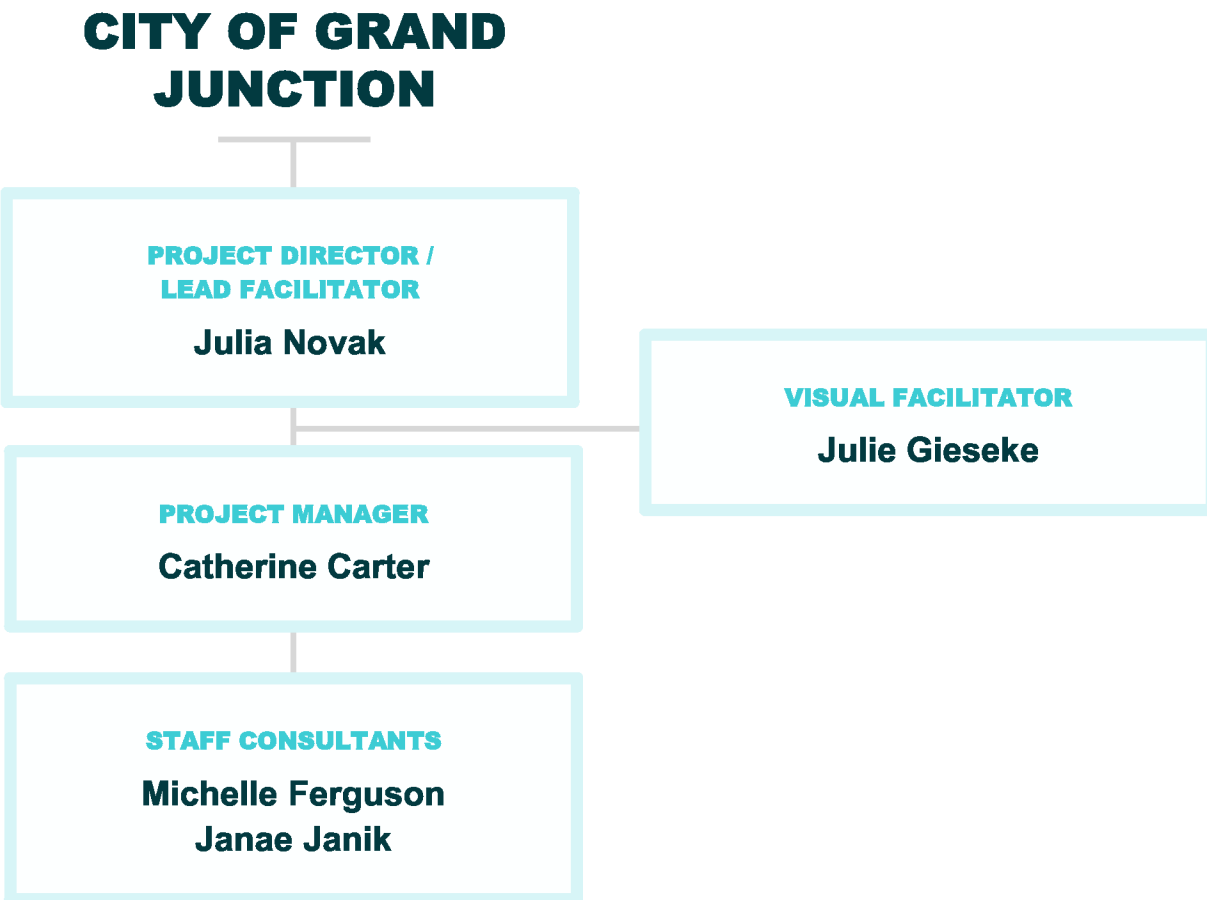
- Provision of data and documents (upload to online drive) - variable
- Project meetings – 1-1.5 hours each
- Interviews - 30-60 minutes each
- Workshops – 2-8 hours each
- Review and revision of Raftelis deliverables – variable, typically 1-2 hours per reviewer

Project Team

WE HAVE DEVELOPED A TEAM OF CONSULTANTS WHO SPECIALIZE IN THE SPECIFIC ELEMENTS THAT WILL BE CRITICAL TO THE SUCCESS OF THE CITY'S PROJECT.

Our project team is made up of senior-level consultants with direct local government experience. What sets our project team apart is our ability to explore and relate to local community values while at the same time, investigating realistic approaches for cost-effective solutions.

An organizational chart of our project team is as follows.



Julia Novak

PROJECT DIRECTOR / LEAD FACILITATOR Executive Vice President

ROLE

Julia will be responsible for overall project accountability and will be available to provide quality assurance and control, industry perspective, and insights into the project.

PROFILE

Julia established The Novak Consulting Group in September 2009. Her reputation and experience as a consultant who offers practical and implementable recommendations are grounded in more than 15 years of active service to local governments, including Fort Collins, Colorado; Lexington, Massachusetts; Rockville, Maryland; and as the city manager of Rye, New York. She is a practitioner first who has expanded her knowledge and expertise as a consultant for hundreds of organizations across the United States.

Julia has extensive experience as a facilitator and trainer. She has worked with both elected and appointed officials from jurisdictions throughout the United States to conduct goal setting, develop strategic plans, and prioritize service delivery. She has conducted training for elected officials as an individual trainer and through the National League of Cities and a consortium of cities in California.

Julia is an established thought leader in the areas of governance and administration. In April 2002, Julia was one of 20 practitioners who participated in the ICMA-sponsored symposium on the future of local government administration. Her response to Dr. James Svara's paper, "City Council, Roles, Performance, and the Form of Government," is included in the ICMA-published book, "The Future of Local Government Administration." Public Management Magazine has published multiple articles that she authored and co-authored, including "Preparing Councils for Their Work," co-authored with Dr. John Nalbandian; "Permission to Manage" which discusses the importance of using data to manage local governments; "Dreams That Make a Difference" on the value of community based strategic planning; "Civility," and most recently, "Using Data in Police Management."

Julia has been a speaker at national conferences for the ICMA, National League of Cities, and American Society of Public Administrators. She has been a featured speaker/trainer for many state associations and local government affiliate organizations throughout the United States.

Julia earned a bachelor's degree in government and politics from George Mason University and a master's degree in public administration from the University of Kansas. Julia was in the first class of individuals certified by ICMA as Credentialed Local Government Managers and maintains that designation. Julia is a Master Facilitator of the popular Myers-Briggs Personality Type Indicator and is certified to administer several other Level B psychological assessments.



Office

- Cincinnati, OH

Specialties

- Effective organizational leadership and management
- Supporting effective governance
- Developing organizational capacity

Professional History

- Local Government Consulting (2003-2020)
- City of Rye, New York: City Manager (2000-2003)
- City of Rockville, Maryland (1995-2000)
- Town of Lexington, Massachusetts (1992-1995)
- City of Fort Collins, Colorado (1987-1992)

Education

- Master of Public Administration - University of Kansas (1988)
- Bachelor of Arts in Government and Politics - George Mason University (1986)

Certifications

- Certified Professional Manager, International City/County Management Association
- Master Facilitator, The Myers-Briggs Personality Type Indicator

Professional Memberships

- International City/County Management Association (ICMA)

Catherine Carter

PROJECT MANAGER

Senior Manager

ROLE

Catherine will manage the day-to-day aspects of the project ensuring it is within budget, on schedule, and effectively meets the City's objectives. She will also lead the consulting staff in conducting analyses and preparing deliverables for the project. Catherine will serve as the City's main point of contact for the project.

PROFILE

Catherine has a background in public administration and environmental management and possesses extensive research and analytical skills. Her expertise lies in the areas of strategic planning, conducting assessments of organizational effectiveness practices, facilitation and engagement, compiling and analyzing data, and benchmarking.

Catherine has participated in numerous strategic planning engagements, including those outlined below:

- City of Aurora (CO) - City-wide strategic plan
- City of Avondale (AZ) - City-wide strategic plan
- City of Bend (OR) – Strategic planning retreat
- City of Bellevue (WA) – Strategic planning and governance retreat
- Central Arizona Project (AZ) – Strategic plan
- Town of Hilton Head (SC) – Strategic planning and governance retreat
- Jefferson County (CO) – County-wide strategic plan
- City of Lafayette (CO) - Strategic planning and governance retreat, Management team retreat, Planning Commission retreat
- League City (TX) – Strategic planning retreat
- City of Lowell (NC) - Strategic planning retreat
- Town of Nantucket (MA) - Strategic planning retreat, Facilities master planning support
- The Port (OH) – Organization-wide strategic plan
- Town of Timnath (CO) - Strategic planning retreat

Catherine has also worked on numerous financial and management studies for water, wastewater, and stormwater utilities and other public sector organizations across the country. Catherine is active in the water and wastewater utility industry, having presented at several conferences and co-authored two recent articles on long-term rate increases in *Journal AWWA*.

Catherine also co-authored a chapter entitled “Public Outreach and Gaining Stakeholder Commitment” for the Fourth Edition of the industry guidebook, *Water and Wastewater Finance and Pricing: The Changing Landscape*. Prior to working at Raftelis, Catherine was a senior fellow at the Institute for Sustainable Development.



Office

- Charlotte, NC

Specialties

- Strategic planning
- Facilitation
- Organizational assessment
- Staffing analysis
- Strategy monitoring and implementation
- Risk and resiliency assessment
- Business process improvement
- Comparative industry analyses

Professional History

- Raftelis: Senior Manager (2022-present); Manager (2019-2021); Senior Consultant (2016-2018); Consultant (2013-2015); Associate Consultant (2011-2012)
- Mecklenburg County Waste Management Advisory Board (appointed term: 2019-2021)
- The Institute for Sustainable Development (2009-2011)

Education

- Master of Public Administration - University of North Carolina Charlotte (2017)
- Master of Environmental Management - Duke University (2011)
- Bachelor of Science in Business/Economics, Biology, Environmental Studies - Randolph-Macon College (2009)

Certifications

- Change Management & Leadership Certification - Cornell University (2019)
- American Water Works Association Risk & Resiliency Certification (2019)

Professional Memberships

- AWWA
- Solid Waste Association of North America

Julie Gieseke

VISUAL FACILITATOR

Visual Facilitator

ROLE

Julie will use visual facilitation to capture participants' dialogue, discussion, and ideation by drawing large visual maps in real time, which helps connect ideas, track content, and synthesize their work.

PROFILE

Julie Gieseke is a visual facilitator, working in the realm of group facilitation, strategic planning and strategic communications for over fifteen years. She creates visuals that bring ideas and people together through image and story.

Julie collaborates on projects utilizing the tools of group process and design, such as visual facilitation, creative engagement, and storytelling, to bring strategy and tactics into clear focus. She also incorporates change methodologies such as Appreciative Inquiry, Positive Psychology, StrengthsFinder, and Neurolinguistics.

Julie's unique skill set combines facilitation, active listening, and visual facilitation to bring sense-making, consensus, energy, and vibrancy to each engagement. As a consultant with The Novak Consulting Group and now Raftelis, Julie has worked on a variety of strategic planning and facilitation projects.

Julie developed her group process design through a broad range of experience. She received her master's degree in Organizational Development and Management from Fielding Graduate University, is certified as a professional coach through The Coaches Training Institute, and is a certified Master Practitioner of Neurolinguistics. Julie also received professional training through The Grove Consultants International and has been mentored by leaders in the fields of visual facilitation, facilitation, organizational development, coaching, storytelling, and performance. The result is a wide range of exposure to various approaches that culminates in a unique style that is customizable for each engagement.



Office

- Remote

Specialties

- Visual Facilitation
- Strategic Visioning/Planning
- Executive Coaching
- Facilitation
- Team Development

Professional History

- Raftelis: Visual Facilitator (2020-present); Visual Facilitator, The Novak Consulting Group (2011-2020)
- Map the Mind: Principal (2008-present) Visual Facilitation, Coaching, Consulting, Teaching

Education

- Master of Arts in Organizational Development and Management - Fielding Graduate University (2008)
- Professional Coaching Certification - Coaches Training Institute (2008)
- Bachelor of Arts in Film and Video Production/Theater Arts - University of California, Santa Cruz (1988)

Certifications

- Master Practitioner of Neurolinguistics
- Certified Professional Co-Active Coach

Professional Memberships

- International Forum of Visual Practitioners

Michelle Ferguson

STAFF CONSULTANT

Vice President

ROLE

Michelle will work at the direction of Catherine in conducting analyses and preparing deliverables for the project.

PROFILE

Michelle has nearly 25 years of management experience with and for local governments across the country.

As organizational assessment practice leader for The Novak Consulting Group, Michelle spearheaded the work of nearly 200 local government reviews in some of the foremost governments across the country. Michelle has completed detailed organizational reviews of entire jurisdictions and recommended improvements to the structure, staffing, and processes within departments of all sizes. Specific department reviews have included development review, parks and recreation, public works, human services, human resources, capital budgeting, and finance.

As a Lean certified professional, Michelle excels at helping local governments continuously improve and rely on data to make informed choices about services to the public. She is skilled in project management, process improvement strategies, performance measurement, consent building, and public process design. Additionally, she has provided customized training in the development and use of performance measures to assist numerous organizations continuously improve service delivery.

Michelle is also a skilled facilitator, able to bring diverse groups of people together to articulate shared visions and priorities. She has led strategic planning engagements at the community, organizational, and department levels, and she has facilitated numerous staff and governing body retreats.

Michelle began her consulting career in 2005 following ten years of direct experience in local government management, which included serving as assistant county manager in Arlington County, Virginia. During her tenure with Arlington County, Michelle oversaw the daily management and implementation of the County's capital program. She also led the organization-wide performance measurement initiative establishing their Balanced Scorecard. Before Arlington County, Michelle served as assistant city manager in Overland Park, Kansas.

Michelle earned a bachelor's degree in political science from Loyola University-Chicago and a master's degree in public administration from the University of Kansas. She is a member of the International City/County Management Association. She also served as the president of the Metropolitan Association of Local Government Assistants in Washington, D.C., and has presented at state and national conferences on topics such as strategic planning, effective governing bodies, and council-staff relations.



Office

- Cincinnati, OH

Specialties

- Organizational assessment
- Staffing analysis
- Process improvement
- Performance management
- Capital planning
- Strategic planning
- Facilitation
- Community engagement

Professional History

- Raftelis: Vice President (2021-present), Senior Manager (2020-2021); Organizational Assessment Practice Leader, The Novak Consulting Group (2009-2020)
- Management Partners: Senior Management Advisor (2005-2009)
- Arlington County, Virginia: Assistant County Manager (2002-2005)
- City of Overland Park, Kansas: Assistant City Manager (1996-2002)

Education

- Master of Public Administration - University of Kansas (1998)
- Bachelor of Arts in Political Science - Loyola University, Chicago (1996)

Certifications

- Lean Certified

Professional Memberships

- International City/County Management Association (ICMA)
- Engaging Local Government Leaders (ELGL)

Janae Janik

STAFF CONSULTANT

Consultant

ROLE

Janae will work at the direction of Catherine in conducting analyses and preparing deliverables for the project.

PROFILE

Janae began her consulting career following 12 years of service with the City of San Diego Superior Court. Her expertise lies in the areas of process improvement, strategic planning, program implementation, and workforce planning and support. She is an innovative problem solver who maximizes the usage of technological solutions.

As a Budget and Finance Analyst with the City of San Diego, Janae assisted in the development of a \$200-million-dollar annual budget, developed forecasting models for future revenue and expenditures, and conducted financial trend analysis of payroll and benefit costs for over 1,200 employees.

Janae is well-versed in the creation of strategic plans and managing high visibility projects with cross-functional impacts. During her tenure as a Court Operations Supervisor, she managed the transition to virtual court proceedings during the COVID-19 pandemic to allow remote access to justice for community members. Other notable projects included re-allocating available resources to maintain services following staffing reductions, authoring standard operating procedures to share best practices throughout the organization, and developing a new electronic system for filing documents to reduce case processing times and improve customer experience. Janae was instrumental in identifying continuous process improvement opportunities that drove operational efficiencies and reduced costs.

Janae began her career at the Superior Court working in various customer service and administrative roles aimed at improving case processing times and providing quality service to members of the San Diego community.

Janae earned a master's degree in business administration and strategic management from Western Governors University and a bachelor's degree in television and film from San Diego State University.



Office

- Charlotte, NC

Specialties

- Organizational assessment
- Process improvement
- Strategic planning
- Program implementation
- Performance management
- Forecasting
- Data analysis

Professional History

- Raftelis: Consultant (2022-present)
- Wells Fargo: Senior Technology Business Systems Consultant -- Contractor (2022)
- San Diego Superior Court: Budget & Finance Analyst (2021-2022); Court Operations Supervisor (2018-2021); Courtroom Clerk (2016-2018); Court Administrative Clerk (2013-2016); Court Operations Clerk (2010-2013)

Education

- Master of Business Administration – Western Governors University (2015)
- Bachelor of Science in Television, Film & New Media – San Diego State University (2010)

Professional Memberships

- Engaging Local Government Leaders (ELGL)

REFERENCES

References

We have included references for each of these clients and urge you to contact them to better understand our capabilities and the quality of service that we provide.

Jefferson County CO

Reference: Stephanie Corbo, Chief Financial Officer

100 Jefferson County Parkway, Golden, CO 80419

P: 303.271.8542 / E: scorbo@jeffco.us

Project Description:

Raftelis was engaged in 2021 to facilitate an update of the county's existing strategic plan and assist with implementation planning for priorities and strategies across the organization. The new strategic plan was designed with guidance from the Jefferson County Board of County Commissioners and crafted with input from engaged residents, local businesses, and key personnel from across the county's organization. The plan represents a cohesive and thoughtful approach to continuing to achieve Jefferson County's vision: to be a county government that provides equitable, innovative, efficient, and quality service to a thriving and safe community. Organizational priorities are to: create safe, healthy, and thriving communities; enhance inclusive community engagement; ensure responsible growth and development; protect natural resources and our environment; strengthen public facilities and infrastructure; operate as an employer of choice; and provide innovative, equitable and effective services.

City of Lafayette CO

Reference: Fritz Sprague, City Administrator

1290 S. Public Road, Lafayette, CO 80026

P: 303.661.1226 / E: Fritz.Sprague@cityoflafayette.com

Project Description:

In 2020, Raftelis supported the Lafayette, Colorado, City Council and City Manager as they established a solid foundation for working together and articulated clear outcomes to align the work of the City with the priorities of the City Council. Two retreats were held in 2020; the first retreat was early in the year and the second was held in the summer months to create space for the Council to process the impact of the COVID-19 pandemic and social justice protests. The Council prioritized its workplan to provide clear direction to the Staff.

City of Centennial CO

Reference: Matt Sturgeon, City Manager

13133 E. Arapahoe Road, Centennial, CO 80112

P: 303.325.8000 / E: msturgeon@centennialco.gov

Project Description:

The City engaged the firm in 2018 to develop its first Strategic Planning Framework. During 2019, that work was expanded to include a clear Vision, Organizational Mission and Values Statements, and Key Performance Areas that will drive success for the City.

City of Louisville CO

Reference: Megan Davis, Deputy City Manager
749 Main Street, Louisville, CO 80027
P: 303.335.4539 / E: mdavis@louisvilleco.gov

Project Description:

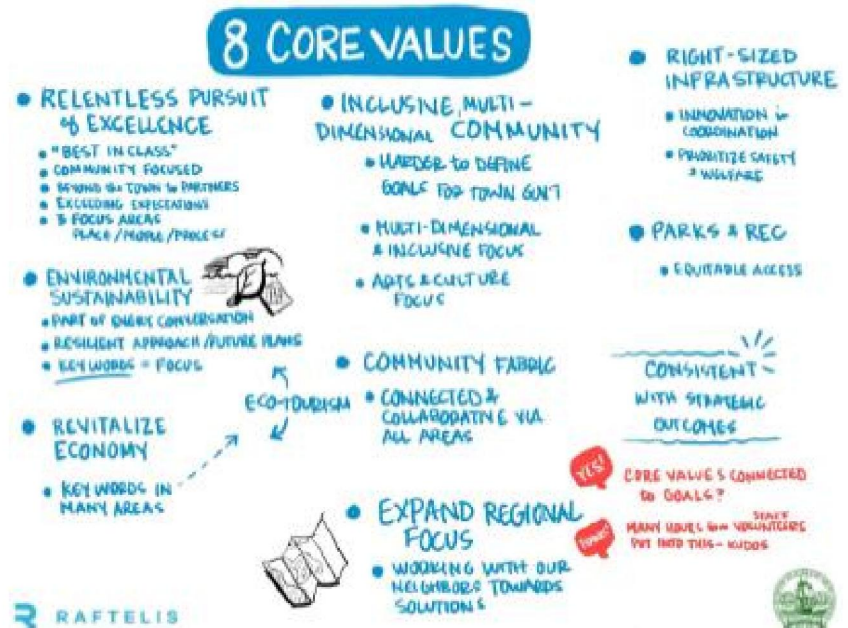
Louisville contracted with the firm to prepare the City's first Strategic Plan. The purpose of the project was to develop an organizational culture that supported the governing body's vision. The project included interviews with staff and elected officials, an employee survey, and workshops that led to the plan's adoption in December 2018.

Town of Nantucket MA

Reference: Libby Gibson, Town Manager
16 Broad Street, Nantucket, MA 02554
P: 508.228.7200 ext. 7305 /
E: lgibson@nantucket-ma.gov

Project Description:

The Town of Nantucket (Town) has engaged Raftelis to assist with several key initiatives, including developing a succession planning framework, facilitating a series of public meetings related to emerging issues and the Town's response, and updating its community strategic plan, all of which directly support implementation of the Town's areas of strategic focus. Raftelis assisted in the development of the Town's areas of strategic focus – Housing, Transportation, Environmental Leadership, Efficient Town Operations, and Quality of Life – through collaboration with staff and the Select Board in the Town's 2018 strategic planning initiative.



Over the last few years, Raftelis has also provided implementation support for monitoring and reporting on key initiatives; hosted community listening sessions on the Town's pandemic and PFAS response; and facilitated the creation of a Town Sustainability Office. Previous studies and projects also included a Town-wide Staffing Study, a structural review of the Town's Planning and Land Use Services function, and support for the Town Administrator's "State of the Town" presentation. We continue to support annual updates to the Strategic Plan and to assist on a variety of complex projects as facilitators and consultants, which has led to a long-term relationship as trusted advisors to Town Administration and the Select Board.

City of Lawrence KS

Reference: Craig Owens, City Manager
6 East 6th Street, Lawrence, KS 66044
P: 785.832.3400 / E: craigowens@lawrenceks.org

Project Description:

The firm worked with the City of Lawrence (City) in 2016 to establish its first Strategic Plan. In 2020, the City turned to us again to expand the level of community engagement and work with the new City

Manager and City Council. The 2020 Strategic Plan included training City Staff to conduct extensive community outreach. The “Lawrence Listens” brand was established to partner with our consultants in conducting outreach that informed the Strategic Plan. This included full community summits with our team, a “Lawrence Listens” volunteer team who facilitated City-hosted focus groups and made appearances before community groups to gain input, Lawrence Listens team members stationed during public gatherings to solicit input and inform about the process, and invitations to the public to participate in online surveys under the “Lawrence Listens” brand.



Town of Shrewsbury MA

Reference: Kevin J. Mizikar, Town Manager
100 Maple Avenue, Shrewsbury, MA 01545
P: 508.841.8508
E: kmizikar@shrewsburyma.gov

Project Description:

In 2022, the firm was contracted to prepare a strategic plan for the Town of Shrewsbury (Town). The workplan included working closely with the Town's Management Team, including all department heads, preparation of an environmental scan, an online survey of all Town staff to gain their input, public visioning sessions open to the community and stakeholders, a strategic planning workshop with the Board of Selectmen, preparation of an implementation template, and meetings with staff goal teams to develop metrics for each goal area.

Town of Westborough MA

Reference: Kristi Williams, Town Manager
34 West Main Street, Westborough, MA 01581
P: 508.366.3032 / E: kwilliams@town.westborough.ma.us

Project Description:

The Town of Westborough (Town) contracted with the firm to facilitate a comprehensive strategic planning process for the Town. The process included extensive public outreach, focus groups, and online resident engagement which resulted in a comprehensive vision for the Westborough community and an articulation of the Town's role in achieving that vision. A graphic representation of the vision and critical success factors is below.

Hilton Head Island SC

Reference: Krista Wiedmeyer, Executive Assistant/Town Clerk
One Town Center Court
Hilton Head Island, SC 29928
P: 843.341.4600 / E: KristaW@hiltonheadislandsc.gov

Project Description:

Hilton Head Island engaged the firm to facilitate the development of its Strategic Plan. Hilton Head is a low-country resort community located on a barrier island off the coast of South Carolina. The Town had a practice of Strategic Planning but was interested in a fresh approach to articulating what must go well in the future and engaging both the Town Council and staff in a process to align priorities and expectations. The refresh of the Town's Strategic Plan established a clear path with six Strategic Outcomes for the future of the Island.



Village of Lisle IL

Reference: Eric Ertmoed, Village Manager
925 Burlington Avenue, Lisle, IL 60532
P: 630.271.4100 / E: eertmoed@villageoflisle.org

Project Description:

In 2021 the Village engaged Raftelis to update the strategic plan that the firm had prepared in 2018. The new strategic plan, developed with a process including a review of historical data and trends, community engagement through focus groups and an online survey, and a two-day facilitated retreat with the Board of Trustees and Senior Leadership Staff. The plan also contains outcome metrics for each strategic performance area that should be tracked in order to measure progress toward achieving the Village's overall vision for the community.

City of Laredo TX

Reference: Rosario Cabello, Interim City Manager
P: 956.791.7302 / E: rcabello@ci.laredo.tx.us

Project Description:

The City of Laredo first engaged with Raftelis to plan and facilitate a Governance and Strategic Planning Retreat in 2021. Topics included an exploration of good governance, roles, emerging trends, defining success for identified strategic outcomes, and the identification of Council priorities. Facilitation included large and small group activities to maximize participation and dialogue. The firm returned in 2022 for additional facilitation assistance.



City of League City TX

Reference: Ogden "Bo" Bass, Assistant City Manager

300 W. Walker Street, League City, TX 77573

P: 281.554.1000 / E: bo.bass@leaguecitytx.gov

Project Dates:

Project Budget and Cost:

Project Description:

In 2017, the City of League City (City) retained the firm to help develop the City's first strategic plan. The project included an employee survey and several workshops with the City's Management Team as well as the Mayor and City Council to develop their final strategic plan. Subsequent annual City Council and Management Team retreats have been held to update and refine the plan.



FEE PROPOSAL

Fee Proposal

The completed Solicitation Response Form can be found on the next page.

The total fixed fee to complete the scope of work outlined in this proposal in-person is \$35,000 for in-person/onsite meetings and \$25,975 for all virtual/remote meetings. This includes all professional fees and expenses.

It is our practice to invoice clients monthly based on work completed.

Hourly rates for team members is provided in the table below by job classification.

Classification	Team Member(s)	Hourly Rate
Executive Vice President	Novak	\$375
Vice President	Ferguson	\$350
Senior Manager	Carter	\$285
Consultant/ Visual Facilitator	Janik, Gieseke	\$195

SECTION 7.0: SOLICITATION RESPONSE FORM
RFP-5186-23-DH Strategic Planning Consultant

Offeror must submit entire Form completed, dated and signed.

- 1) All inclusive, not to exceed cost, to provide professional services for the Strategic Planning Consultant project to include, but not limited to: labor, materials, equipment, travel, licenses, permits, fees, etc. as per Scope of Services:

Description	Onsite/Personal Meetings	Virtual Meeting Option
Phase 1	\$23,050	\$17,025
Phase 2	\$9,025	\$6,000
Final Report	\$2,925	\$2,950
Not To Exceed Cost	\$35,000	\$25,975

Not To Exceed Cost Written for Onsite/Personal Meetings:

Thirty-Five Thousand and 00/100 _____ dollars

Not To Exceed Cost Written for Virtual Meeting Option:

Twenty-Five Thousand, Nine-Hundred Seventy-Five and 00/100 _____ dollars

Anticipated delivery of Phase 1 _____ June 2023

Anticipated delivery of Phase 2 _____ July 2023

Anticipated delivery of Final Report _____ August 2023

The Owner reserves the right to accept any portion of the Service(s) to be performed at its discretion

The undersigned has thoroughly examined the Request for Proposals and 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; or as accepted by the Owner.

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 they are 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 of Grand Junction 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.
- City of Grand Junction payment terms shall be Net 30 days.
- Prompt payment discount of 0 percent of the net dollar will be offered to the Owner if the invoice is paid within 0 days after the receipt of the invoice. The Owner reserves the right to consider any such discounts when determining the bid award that are no less than Net 10 days.

RECEIPT OF ADDENDA: the undersigned Firm acknowledges receipt of Addenda to the Solicitation, Specifications, and other Contract Documents. State number of Addenda received: 1

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

Raftelis Financial Consultants, Inc.

 Company Name – (Typed or Printed)


 Authorized Agent Signature
19 Garfield Place, Suite 500

 Address of Offeror
Cincinnati, OH 45202

 City, State, and Zip Code

Julia Novak

 Authorized Agent – (Typed or Printed)
513.221.0500

 Phone Number
jnovak@raftelis.com

 E-mail Address of Agent
2/7/2023

 Date