



PROPOSAL

TECHNICAL PROPOSAL TO THE:

City of Smithville

REQUEST FOR QUALIFICATIONS
NO. 26-03 FOR A:

Strategic Plan Update

SUBMITTED BY:

Berry, Dunn, McNeil & Parker, LLC
2211 Congress Street, Portland, ME 04102

Seth Hedstrom

Project Principal

Berry, Dunn, McNeil & Parker, LLC
shedstrom@berrydunn.com

Maddison Powers Spencer

Project Manager and Facilitator

Berry, Dunn, McNeil & Parker, LLC
maddi.powers@berrydunn.com

Proposal Submitted On:

February 4, 2026, before 1 p.m. EST

COPY

berrydunn.com





February 4, 2026

City of Smithville
Attn: Gina Pate, Assistant City Administrator
107 W. Main Street, Smithville, MO 64089

Dear Gina Pate:

On behalf of Berry, Dunn, McNeil & Parker, LLC ("BerryDunn," "we," "our"), I am pleased to submit this technical proposal in response to the City of Smithville's (the City's) request for qualifications (RFQ) No. 26-03 for a Strategic Plan Update. We have read the City's request and reviewed its terms, conditions, and the contents presented therein. Our proposal is a firm and irrevocable offer valid for 120 days from the submission deadline of February 4, 2026.

As the City will learn more about in the following pages, our firm is a nationally recognized professional services firm headquartered in Portland, Maine, with nine office locations. We are focused on **inspiring organizations to transform and innovate** and have lived our core values and preserved our reputation for excellence throughout our 52-year history. Our firm's culture is centered on a deep understanding of our clients' commitment to serving the public. We proudly tailor each of our projects to recognize the work our clients do every day. **We care about what we do, and we care about the people impacted by our work—including those at the City and in the Smithville community.**

As further described in key sections of our proposal, we possess several attributes that other proposers would be troubled to match:



Expert facilitators bring a toolbox of communications and consensus-building techniques



A living, results-driven plan built for you and designed to align budget decisions with measurable goals



Three decades of experience facilitating more than **70 strategic plans**, with **key projects in Missouri**



Inclusive, technology-enabled engagement and analysis, designed to meet people where they are

We are confident that if we are chosen to partner with the City on this important initiative, the City will experience the strategic success and progress it desires. We appreciate the opportunity to propose, and the time and consideration taken by the City to review our submission.

As a principal and leader in our Local Government Practice Group, I can attest to the accuracy of our materials, and I am legally authorized to bind, negotiate, make presentations on behalf of, and commit our firm and our resources. **If you have questions regarding our proposal or updates on the evaluation process, please consider me your primary point of contact and feel free to contact me directly.**

Sincerely,

Seth Hedstrom, PMP®, LSSGB, Principal
Berry, Dunn, McNeil & Parker, LLC
2211 Congress Street, Portland, ME 04102
T: 207.541.2212 | E: shedstrom@berrydunn.com



Table of Contents

<u>SECTION</u>	<u>PAGE</u>
Firm Overview	2
Specialized Expertise of the Enterprise Organizational Development Practice	3
Project Team and Qualifications	4
Organizational Structure	4
Roles, Responsibilities, and Qualifications	4
Relevant Project Experience and References	7
Our Commitment to the State	7
Strategic Planning Experience	7
References	8
Project Approach	10
A Strategic Plan Designed Uniquely for Smithville	10
Approach and Guiding Methodologies	11
Work Plan	14
Proposed Schedule	20
Participant Responsibilities	21
Appendix A. Resumes	23
Appendix B. Strategic Plan Work Samples	29

Firm Overview

BerryDunn was formed in 1974 and has 76 principals, 35 owners, and nine office locations. We have experienced sustained growth throughout our **52-year history**.

We employ more than 990 staff members—including more than 400 in our Consulting Services Team. From extensive project experience for more than 900 state, local, and quasi-governmental agencies, our team brings valuable perspectives to every engagement. Additionally, our team has experience serving state and local government agencies, providing them with an in-depth understanding of government operations, staffing needs, budgetary constraints, and the business processes required to provide necessary services to the internal divisions and the constituents the City serves.

Our firm provides a full range of professional services—including organizational development, technology planning, business process improvement, cost of service and financial analysis, community services planning, and more—supporting our ability to complete the requested tasks.

With organizational development as a core tenet of our work, we are pleased to offer the following services to benefit the City:

- **Strategic planning**
- Community/stakeholder engagement
- Leadership development
- Executive coaching
- Organizational change management
- Organizational assessment
- Business process improvement
- Performance measurement

Below, we illustrate the overall organization of BerryDunn's Local Government Practice Group. We provide unparalleled expertise and unique insights across these practices, supporting our clients in solving some of their biggest challenges, addressing opportunities to improve and plan, and carefully considering how our projects impact the organization at the enterprise and departmental levels.



Enterprise Digital Transformation



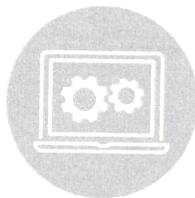
Enterprise Organizational Development



Community Development and Utility Operations



Parks, Recreation, Libraries



Technology Management



Health and Community Services



Justice and Public Safety



Specialized Expertise of the Enterprise Organizational Development Practice

BerryDunn's dedicated Enterprise Organizational Development Practice offers both an intimate project experience and a national perspective to support our clients' desire to transform and innovate. We recognize how important it is that the City establishes partnership with a firm that understands that work at this level of impact requires a guided hand and a tailored approach to meet them where they are and lead them to where they want to go.

Work of this nature touches all aspects of an organization, including the City's elected officials, staff, stakeholders, community members, and visitors. As such, this initiative requires a layered approach that offers the attention, guidance, and follow-through that will support positive, sustainable, and long-term change.

Our efforts are centered on sound partnership with our clients. We guide projects at various stages and take the time to properly gauge availability and resources to help ensure our clients receive consistent, reliable, and quality service. We support a variety of organizational development initiatives, providing services that include project management, stakeholder and community engagement and analysis, strategic plan development, implementation planning, and progress monitoring, among others.

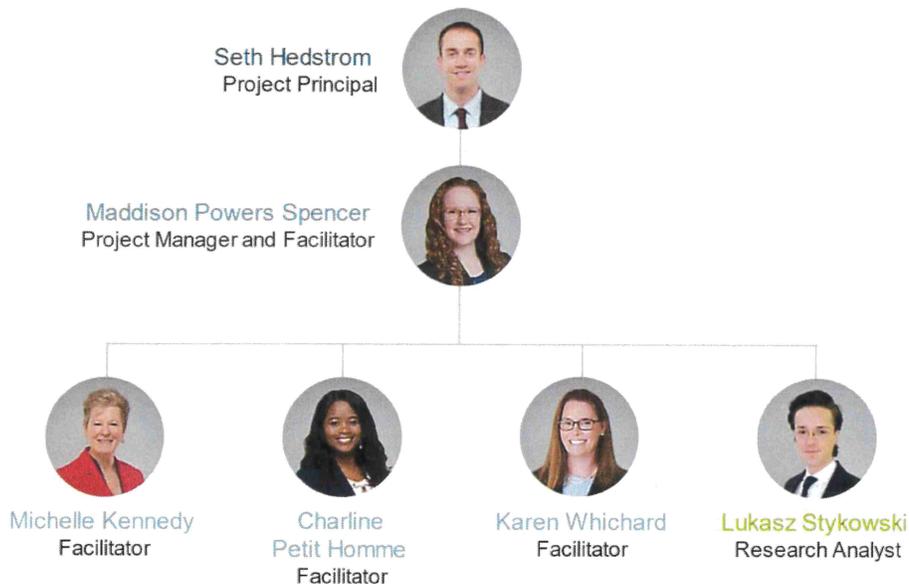
Project Team and Qualifications

Organizational Structure

At BerryDunn, we believe in the synergy that accompanies a team approach. That said, we have carefully assembled a project team with unique and specialized qualifications that coincide with the needs and desired outcomes of the City. **These project team members will remain committed, available, and assigned to perform the City's requested work effort.**

Figure 1 describes the organizational structure of our project team, followed by a listing of project staff. It should be noted we do not intend to subcontract any portion of the City's desired scope of work.

Figure 1: Project Team Organizational Structure



Roles, Responsibilities, and Qualifications

On the following pages, we list our project team members' experience, qualifications, and expertise as they relate to projects of this nature and work with comparable local government clients. Our project team members' full resumes can be found in **Appendix A** for further review.



Seth Hedstrom, PMP®, LSSGB

Project Principal

Seth is a principal and the leader of our Local Government Practice Group. He brings extensive experience in project management. He has served as project principal on nearly all BerryDunn's organizational development projects and has managed more than 75 enterprise process and technology planning projects over the course of 15 years with BerryDunn. Seth has led our clients through many of the complex decision points and issue-resolution processes typical of large-scale planning and improvement projects and facilitated effective change. His experience includes providing oversight of strategic planning projects, assessing and documenting current environments, benchmarking

with similar organizations, introducing industry best practices, developing recommendations, conducting organizational and operational assessments, and implementing and operationalizing plans and outcomes.

As the **project principal**, Seth will maintain overall responsibility for the services provided to the City, help ensure the commitment of our firm and appropriate resource allocation, and review and approve all deliverables in accordance with our quality assurance processes.



Maddison Powers Spencer, MPA

Project Manager and Facilitator

Maddison is a senior consultant in our Local Government Practice Group. She leverages her firsthand public-sector experience as an assistant to the city manager to support clients and drive successful projects. Certified in the Institute of Cultural Affairs (ICA) Technology of Participation® (ToP®) facilitation methodology, she is adept at leading community and employee engagement efforts and synthesizing outcomes to enhance client results. Maddison's strong communication, leadership, and project management skills complement her ability to conduct current environment assessments, analyze data, and organize and facilitate groups. She has assisted with the development of almost 40 local government strategic plans.

As the **project manager and facilitator**, Maddison will serve as the City's primary point of contact, leading day-to-day project management, staff oversight, and the development of the Project Work Plan and Schedule. She will guide the analysis and development of deliverables, design and support strategic planning sessions and interviews, provide subject matter expertise, and present findings and the Final City of Smithville Strategic Plan.



Michelle Kennedy, Prosci® CCP, ODCC

Facilitator

Michelle is a senior manager in our Local Government Practice Group and has more than 30 years of government-sector management and consulting experience. She is an expert in organizational development, including strategic and business planning, leadership development and executive coaching, organizational assessments, organizational change management, program evaluation, business process improvement, and performance measurement. Michelle has provided consulting services and project leadership for state and local government agencies throughout the United States. She is a strong facilitator and is certified in several related areas, including in the ICA ToP® facilitation methodology, a key component of our strategic planning approach. In total, Michelle has facilitated the development and writing of strategic plans for more than 70 public-sector organizations and provided leadership for several that have been recognized in the industry for strategic planning excellence.



Charline Petit Homme, MPA, PMP®, Prosci® CCP

Facilitator

Charline is a manager in our Local Government Practice Group. She has 13 years of experience working in the public sector and consulting, and she is particularly skilled in leading clients through complex transformational initiatives, including strategic planning projects. She is a strong facilitator and is certified in the ICA ToP® facilitation methodology. Her experience also includes organizing and leading groups through the adoption of new ideas and concepts, and promoting buy-in. She brings in-depth knowledge and involvement with strategic planning, change management, and

relationship building through her strong communication, leadership, and project management skills. She is especially skilled at facilitating stakeholder engagement efforts and synthesizing outcomes to optimize results for her clients. Prior to joining BerryDunn, Charline spent multiple years serving the public-sector, supporting and conducting field research, data collection, organizational reporting, gap analysis, and recommendations development. She leverages her experience to provide firsthand insights and lessons learned on similar organizational development engagements.



Karen Whichard, MPA, Prosci® CCP

Facilitator

Karen is a manager in our Local Government Practice Group and a seasoned public-sector leader with 19 years of experience in both small and large local governments. As a member of the City of Charlotte, North Carolina's Strategy & Budget Department, she provided oversight for operating and capital budgets for functions including housing and neighborhoods, code enforcement, solid waste collections, and the City's water/sewer utility. This work included analyzing budgets and personnel requests for appropriate staffing levels, assessing departmental efficiency and effectiveness, evaluating capital needs, benchmarking city services, and ensuring rates and fees were set to meet cost recovery targets. As assistant town manager for the Town of Davidson, North Carolina, she managed the Town's \$14 million public facilities project, as well as \$17 million in general obligation bond projects for parks, greenways, and transportation. Part of this work led to the Town's first AAA bond rating. At BerryDunn, Karen has led organizational assessments and strategic planning efforts for clients throughout the United States.

As the **facilitators**, Michelle, Charline, and Karen will collaborate with our proposed project manager on the facilitation approach; participate in leadership meetings; facilitate interviews, focus groups, community forums, and strategic planning sessions; and contribute to deliverable development.



Lukasz Stykowski, MPP, LSSGB

Research Analyst

Lukasz is a consultant in our Local Government Practice Group and has a background in government services consulting, management analysis, and budget outreach. He brings first-hand public-sector experience through previous roles with three different cities, which allows him to better understand the needs of our clients.

As the **research analyst**, Lukasz will document engagement and strategic planning outcomes, assess the City's current environment, analyze existing data, and research best practices and industry standards.

Additional Resources

BerryDunn's Consulting Services Team includes more than 400 consultants, including more than 90 Local Government Practice Group consultants who specialize in supporting public-sector clients. As needed, our project team will draw on the support of our vast pool of business analysts and subject matter experts (SMEs). These consultants will provide in-depth knowledge of various aspects of local government and support the project team with efforts related to fact-finding, research, and deliverable development.

Relevant Project Experience and References

Our Commitment to the State

With BerryDunn, the City will be served by a firm and project team members who have **demonstrated their commitment to the State** through similar and other types of consulting engagements. Below, we share our clients in the State. An asterisk indicates that we have been selected to conduct the work; however, work has not yet begun.

- City of Blue Springs
- City of Crestwood
- City of Columbia*
- City of Ferguson
- City of Gladstone
- City of Independence
- City of Jefferson City
- City of Kirkwood
- City of Maryland Heights
- City of St. Charles
- Lindbergh Schools
- Metropolitan Community College
- MO Department of Economic Development
- MO Department of Elementary and Secondary Education
- MO Department of Health and Senior Services
- MO Department of Labor and Industrial Relations
- MO Department of Mental Health
- MO Department of Social Services
- MO Division of Accounting
- MO Information Technology Services Division
- MO Office of Administration

We also take pride in our local presence, as we have several employees who reside in the State and/or have worked in State's local government landscape. We will leverage their insights, expertise, and locality when and where it will most benefit the City.

Strategic Planning Experience

BerryDunn has been offering strategic planning services for 40 years and has worked with a long list of local government clients. Through this experience, we have assisted a wide range of clients with various services related to those requested by the City.

Below, we provide a representative list of clients for whom our project team members have performed similar services in recent years.

- Bloomfield Township, MI
- City of Apopka, FL
- City of Beaverton, OR
- City of Blue Springs, MO
- City of Capitola, CA
- City of Colorado Springs, CO
- City of Cooper City, FL
- City of Creswell, OR
- City of Edgewater, CA
- City of Ennis, TX
- City of Evans, CO
- City of Maryland Heights, MO
- City of Menifee, CA
- City of Milton, GA
- City of New Braunfels, TX
- City of Peoria, IL
- City of Port Arthur, TX
- City of Redlands, CA
- City of Santa Monica, CA
- City of St. Charles, IL
- City of Washougal, WA
- City of Waukesha, WI
- Lake County, IL
- Lancaster County, NE
- Lane County, OR
- Marquette County, MI
- Onslow County, NC
- Orange County, NC
- Pitt County, NC
- Santa Clara County, CA
- St. Johns County, FL
- Tompkins County, NY
- Town of Chelmsford, MA
- Town of Holliston, MA

- City of Foley, AL
- City of Gresham, OR
- City of Groveland, FL
- City of Homestead, FL
- City of Indio, CA
- City of Janesville, WI
- City of Lauderhill, FL
- City of Margate, FL
- City of Wausau, WI
- City of Westminster, CO
- Cumberland County, PA
- DuPage County, IL
- Erie Housing Authority, PA
- Jefferson County, WA
- Kane County, IL
- Vancouver Housing Authority, WA
- Vallejo Flood and Wastewater District, CA
- Village of Northbrook, IL
- Washington County, MN
- Weld County, CO

References

The greatest testament of our high-quality work is the expressed satisfaction shared by our clients. Below, we describe and provide contact information for four recent projects for the City's consideration. These clients can speak well about the quality and satisfaction we deliver on comparable engagements.

City of Blue Springs, Missouri

George Schmitz, Assistant to the City Administrator
 903 West Main Street, Blue Springs, MO 64015
 816.655.0498 | gschmitz@bluespringsgov.com

In response to recent leadership changes and community growth, the City of Blue Springs engaged BerryDunn to develop a new strategic plan aligning the vision and priorities of its mayor, City Council, staff, and community. The plan provides direction for City leadership and staff as they navigate evolving needs in public services, infrastructure, and community engagement.

BerryDunn led a collaborative planning process that included data analysis, stakeholder engagement, a customized Social Pinpoint site, and numerous facilitated planning sessions. We have conducted stakeholder interviews, community forums, and two strategic planning sessions for the City Council and leadership team. We then developed a goal-oriented strategic plan to serve as a roadmap for future decision-making, resource allocation, and long-term progress tracking. The draft of the Final Strategic Plan was adopted by the City in July 2025.



Working with the BerryDunn team to help build our City's Strategic Plan was invaluable. The firm's approach was forward-thinking and collaborative, allowing us the opportunity to work together while thinking about what our City's needs are for the future. Oftentimes, cities will work on over-arching, long-term plans without being provided the means to implement the plan, but the BerryDunn team set us up to immediately begin work on implementation. They were instrumental in helping us configure a plan that was both ambitious and actionable, and we were thoroughly satisfied with how our Strategic Plan came together.

George Schmitz, Assistant to the City Administrator
 City of Blue Springs, Missouri

City of Port Arthur, Texas

Shanell Perkins, Executive Secretary
444 4th Street, Port Arthur, TX 77640
409.983.8062 | shanell.perkins@portarthurtx.gov

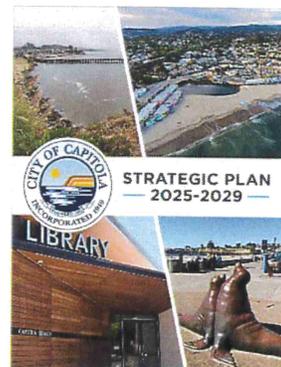
Located on the Gulf Coast, 90 miles east of the Houston Metro, the City of Port Arthur is home to just over 50,000 residents. As a major deepwater port on Sabine Lake and the Sabine-Neches and Gulf Intercoastal waterways, it's known as the Cajun Capital of Texas. To mark the celebration of its 125th anniversary, the City embarked on a strategic planning initiative. The City selected BerryDunn to lead a data-driven, community-backed planning process to help achieve its long-range vision of transformation and to make Port Arthur more desirable as a place to live and do business. BerryDunn began the planning effort in August 2024 and has gathered extensive input from the community, through both in-person engagement efforts like community forums and virtual outreach facilitated through the Social Pinpoint site. We are currently working with the City to transform demographic, economic, and livability index data, alongside community input, into the strategic priorities, goals, and objectives that will shape the final strategic plan.



City of Capitola, California

Jamie Goldstein, City Manager
420 Capitola Avenue, Capitola, CA 95010
831.475.7300 | jgoldstein@ci.capitola.ca.us

BerryDunn recently completed the development of a five-year strategic plan for the City of Capitola, a small, coastal community of 9,500 residents. Over the course of the project, we engaged City leadership, staff, and community members through one-on-one and group interviews and workshops, an interactive project website, virtual surveys, and social media. We leveraged concurrent and existing plans and outreach, such as the City's likely-voter surveys; Capitola General Plan; Vision Capitola; and policies, plans, and budgets. Through collaborative strategic planning sessions, we helped the City define its mission, vision, values, strategic priorities, and performance measures and metrics. Together, we identified six strategic priorities and established objectives and performance measures for each. The final plan was presented to the City Council and adopted in March 2025.



Project Approach

A Strategic Plan Designed Uniquely for Smithville

The City of Smithville is a small town that offers its nearly 11,000 residents the best of both worlds: easy access to the Kansas City metropolitan area while maintaining its own distinct identity. Located just 20 minutes north of downtown Kansas City, Smithville has grown as a welcoming lake town for those who value proximity to an urban center while enjoying a more rural, community-oriented setting. The City's natural environment, characterized by the picturesque Smithville Lake, is central to the City's character and quality of life. Complementing its natural amenities is a downtown Heritage District that features unique local shops, award-winning dining, and year-round events.

The City recognizes that its future success depends on honoring the qualities that make Smithville unique while thoughtfully planning for change, growth, and evolving community needs. As such, the City is seeking a consultant who can lead a collaborative and inclusive process to update the City's 2019 Strategic Plan. Success in this process will be achieved by a consultant who can authentically capture Smithville's identity and translate it into a clear, actionable, and community-owned roadmap. This includes building consensus around an inspiring community-wide vision, engaging a diverse range of community members and City staff, reevaluating community strengths and needs, and developing an implementable Strategic Plan with defined actions, responsibilities, timelines, and costs. Together, these outcomes will help ensure the resulting document reflects the voices, values, and priorities of the Smithville community, rather than a one-size-fits-all approach.

Why Choose BerryDunn?

With our understanding of the City's scope of work in mind, we are certain that we are well qualified to partner on this engagement. As outlined in our Cover Letter and described in the methodologies and work plan sections below, we bring several qualifications that other proposers would be troubled to match, and that will help ensure the City experiences the strongest possible strategic planning process.



Focus on practical, goal-oriented, and budget-aware performance measurement

Our approach to strategic planning is grounded in measurable impact and lasting progress. We focus on developing a living, results-driven plan developed by City leadership (including **elected officials and staff**) and tailored to the City's unique vision and priorities, with practical guidance for implementing, monitoring, and executing key performance indicators (KPIs). Ultimately, our process results in goals that are related to the delivery of core services such as police, parks and recreation, and public works. We understand local government budgeting and how to connect strategy to resources, and our KPIs are designed to be realistic, quantifiable, and achievable within the constraints of local government budgets. We also integrate best practices from the Government Finance Officers Association (GFOA) to help ensure the City's Strategic Plan is closely aligned with budgeting, so resources are directed toward achieving its most important goals.



Proven facilitation approach and strong communication skills

We understand that reaching consensus can be difficult as individuals seek to advocate for the needs and concerns they believe in most and that represent the interests of their constituencies. Our approach is based in the ICA ToP[®] facilitation methodology and designed to meet the needs of stakeholders, including elected and appointed officials,

managers, frontline staff, and the public. Throughout the process, we will keep stakeholders informed and involved, helping to ensure the City's strategic planning effort is inclusive of all perspectives and reflects a shared vision. We also offer various innovative engagement strategies intended to generate excitement for the project, participation in the work effort, equity in information-gathering activities, success in thoroughly assessing the current environment, and understanding in how to bring the City to new heights.



Significant strategic planning experience nationwide and within the State

BerryDunn's Local Government Practice Group has been providing strategic planning services for more than 30 years. Through our dedication to serving the public sector and broad professional service offerings, we bring a holistic approach to facilitating a sound strategic planning process. Further, with BerryDunn, the City will be served by a firm and project team members who have demonstrated their commitment to the State and region through similar and other types of consulting engagements. BerryDunn has completed nearly 20 projects in the State of Missouri, with key strategic planning projects for the Cities of Blue Springs and Maryland Heights.



Structured engagement techniques grounded in innovation and accessibility

Our project team members are known for their ability to engage strategic planning participants in meaningful, welcoming ways. All our project team members exclusively serve local government clients, and the majority worked in local government organizations prior to joining BerryDunn. As a result, our team knows how to connect with internal stakeholders to unite disparate views, leveraging our deep understanding of local government organizations, including their opportunities, challenges, priorities, constraints, and commitment to serving the varied needs of community members. We also are skilled in engaging external community stakeholders by leading inclusive and participatory activities, such as community forums, pop-up events, and interactive public project sites, to make strategic planning fun and met with excitement and acceptance.

Approach and Guiding Methodologies

Our project team will engage the City's various stakeholders in ways that will maximize creativity and innovation and inspire collaboration and consensus for achieving its vision, including:

- The Board of Aldermen
- City Executive Leadership
- City staff
- Residents
- Community groups and key partners

It is our goal to help the City develop a strategic plan that can reasonably be implemented with support and commitment from these stakeholders and others. As an update to the current 2019 strategic plan, we will review and adjust to move the City toward its vision of the future. We know that a strategic plan should be foundational to navigate times of organizational change and also serve as a living document that can be updated to remain relevant and applicable to current circumstances. This plan should define the organization's reason for being; establish a clear and compelling vision; set measurable objectives and performance measures; lay out the desired impact on



The North Star Vision

An organization's North Star Vision serves as a unifying focal point for long-term achievement. It must be clear enough for stakeholders to know what they are working toward and how to get there. Stakeholders must see their role in this vision and believe in the organization's dream, as they will play a vital role in executing on it.

and value added to the entire community; and help clarify direction and focus, assisting in aligning resources to accomplish strategic objectives.

Having a clear, concrete strategic direction will help keep the City on track and focused on what is important when challenges, changes, and unanticipated events occur. It also helps ensure decisions, policies, plans, programs, and processes are designed through the lenses of stewardship of resources, accessibility, and collective impact.

Partnering with Your Leaders

A critical component of our project management approach is building intentional partnerships with organizational leaders. To help ensure project success, we orient organization and project leaders to our process, build a foundation of shared understandings, and work together toward the common goal of developing an achievable and impactful strategic plan. We serve as trusted advisors, using our extensive experience to guide the process in collaboration with the unique desires and needs of the City's leaders.

Planning in Context—A Proven Approach, Tailored to Your Needs

Our specialized knowledge, sound methodology, and extensive experience with a wide variety of local government clients allow us to provide a proven strategic planning process, as well as the dexterity to tailor that process to the unique needs and circumstances of each client. This includes customization based on the City's size, resources, previous experience with strategic planning, unique organizational and stakeholder needs, and more. With BerryDunn, the City can expect localized, "white glove" service from a firm with both regional and national perspectives.

Achieving Consensus and Quickly Moving Groups to Action

We will design and conduct a well-facilitated strategic planning process that uses data and personal knowledge to assess the City's environment. Our project team will use the ICA ToP[®] facilitation methodology to help ensure the City's strategic planning sessions are highly collaborative and inclusive of all stakeholders.

The ToP[®] methodology emphasizes structured participation that pulls information into the group's thinking process and creates a clear intention, helping members of the group align with one another and reach consensus. Structured participation encourages the values shown in Figure 2 below.

Figure 2: Values Encouraged by Structured Participation as Defined by the ICA ToP[®] Facilitation Methodology



Effectively Engaging Stakeholders

We will utilize several strategies to effectively engage and collect data and information from the Board of Aldermen, leadership, staff, and community. This includes developing a communications strategy, conducting interviews, conducting a community survey, facilitating focus groups and community meetings, and creating an interactive project landing page and engagement website via Social Pinpoint.

Virtual Engagement

Social Pinpoint is a customizable community engagement platform that is used to inform stakeholders of project goals, objectives, and progress, and to provide opportunities to interact and gather information. This tool has several features that we use frequently and as needed throughout strategic planning projects, such as forums, mapping, an ideas wall, and surveys. **Social Pinpoint is mobile-friendly and can be translated into multiple languages, making it easy for City residents to participate.**

With this tool, we will easily be able to set up a landing page and sub-pages for the City to capture the culture of the stakeholders it serves—providing opportunities for participants to contribute to the City’s mission, values, vision, and strategic priorities. We will also be able to track analytics and progress in real-time, promote participation, and set up email notifications to help ensure that, even in a remote environment, effective strategic planning and community engagement activities can take place. To see how we may customize a page to suit a client’s specific engagement needs, we invite the City to explore our recently developed site for the **City of Blue Springs, Missouri**, by scanning the QR code to the right.



<https://engageberrydunn.mysocialpinpoint.com/blue-springs-strategic-planning>

Surveys

Well-designed surveys collect actionable data and provide insights into the mindsets, understandings, and desires of stakeholder groups. Surveys are typically administered as a component of the Social Pinpoint site; however, they can also be administered as a stand-alone engagement if the City wishes.

Survey Design – Before administering a survey, we will review any previous surveys and results to inform the current effort. Drawing on our experience, we focus on asking the right questions, keeping them clear and concise, and using familiar terminology. We also conduct a pilot with project leadership and team members to help identify unclear items and refine questions.

Survey Distribution – We will work with the City to identify the target audience and best distribution method. The survey’s format, introduction, and delivery will be designed to be accessible and engaging to maximize response rates.

Survey Questionnaire – When appropriate, BerryDunn includes voluntary demographic questions—such as gender, race, age, income, housing, and education—to identify potential differences in experiences among historically marginalized groups, supporting a bias-free methodology and respecting participant anonymity.

Community Forums

BerryDunn facilitates open houses and community forums that are aimed at our target audiences, and we make our interactions fun, engaging, and welcoming, helping to meet people where they are and build rapport. We utilize these forums to gather input, engage in discussion, share information, and promote

buy-in and consensus for strategic initiatives and future plans. We are innovative, creative thinkers and facilitators, making our community outreach interesting and something participants want to take part in.

Interviews and Focus Groups

BerryDunn has extensive facilitation experience, including community forums, focus groups, and group and one-on-one interviews. In various professional roles, our team has gained this experience by interviewing, facilitating, and presenting to a wide variety of community stakeholders. Our proposed project team includes experienced facilitators trained in the ICA ToP® facilitation methodology described on the previous page. They have the skills and knowledge necessary to establish credibility, build trust, ask the right questions, and elicit information from a wide range of groups and participants.

Connecting Objectives to Outcomes and Resources

Another key to success is aligning the Final City of Smithville Strategic Plan with the City's annual budgeting and decision-making. When groups have difficulty agreeing on priorities or selecting just a few to focus on, we use a cost-benefit scoring sheet that helps the group score the impacts, risks, level of difficulty, and effort for each strategy or objective to determine the ones to prioritize.

We are also pleased to provide optional implementation planning support after strategic plan adoption, helping develop an actionable plan to help the City track progress and report outcomes. Our team can assist in mapping how the City will execute its strategic priorities. The resulting Implementation and Action Plan will equip the City to carry out and adjust the Final City of Smithville Strategic Plan effectively over the next five years.

Work Plan

BerryDunn strives to be flexible when it comes to development and execution of an effective work plan. We understand that no two projects are exactly alike and believe that **one of the primary reasons we have been successful with similar projects is our willingness to be flexible in adapting to our clients' unique needs.**

Figure 3 presents an overview of our work plan intended to achieve the City's goals and objectives for this important initiative.

Figure 3: Work Plan Overview



Our proposed work plan is described in full detail on the following pages.



Phase 1: Project Planning and Management

1.1 Prepare for and conduct an initial virtual project planning meeting. Upon conducting background research to gain more familiarity with the City, we will conduct initial project planning with the City's project team to identify project milestones and expectations for stakeholder engagement in the strategic planning process. We will introduce key team members, clarify project goals and objectives, identify known project constraints, and refine dates and/or tasks, as appropriate. We will discuss our approach for managing communications between BerryDunn and the City, as well as our approach to scope, risk, and resource management. We will also review possible formats for the Final City of Smithville Strategic Plan. These discussions will help us to refine our currently proposed Project Work Plan and Schedule.

1.2 Request and compile documents and data. We will request and compile documentation and data to help us better understand the current environment and inform engagement activities.

Examples include:

- Key performance metric data
- Program descriptions and data
- Past internal and external assessments
- Past strategic plans and associated material, including the City's 2019 Strategic Plan and 2030 Comprehensive Plan
- Other existing planning and policy documents, organizational charts, staffing, and budgeting details
- Previous surveys of City stakeholders and staff
- Data from previous community and stakeholder engagement efforts that are relevant to development of the Final City of Smithville Strategic Plan
- Demographic, economic, and community data and forecasted trends from the U.S. Census Bureau, the Modified Age and Race Census (MARC), the U.S. Bureau of Labor Statistics, American Community Survey, U.S. Department of Education, Centers for Disease Control and Prevention, the Opportunity Index, and other state and local data sources

Once provided, we will review the documentation and data to help us produce an Environmental Scan and Strategic Analysis that will inform engagement activities.

1.3 Develop a Project Work Plan Schedule. Based on the information gathered from our initial project planning meeting and document and data review activities, as well as from those details enclosed in this proposal, we will develop the Project Work Plan and Schedule, which will outline the tasks and timelines for the strategic planning process. The Project Work Plan and Schedule will also include agreed-upon procedures between BerryDunn and the City related to project control, including quality management and deliverable submission/acceptance management. After providing draft versions of these materials in advance, we will facilitate a videoconference with the City's project team to review the drafts and solicit feedback. This videoconference will introduce the City's project team to our document review process and provide an opportunity for the City to share input on a critical step in the process. We will incorporate the City's feedback and finalize the documentation before distributing it in final form.

→ Deliverable 1: Project Work Plan and Schedule

1.4 Conduct Biweekly Project Status Meetings. Our project manager, Maddison Powers Spencer, will conduct Biweekly Project Status Meetings with the City's project manager on an ongoing basis throughout the strategic planning process. We will use these meetings to describe the activities and accomplishments

for the reporting period; plans for the upcoming month; risks or issues encountered during the reporting period; and anticipated problems that might impact project deliverables. We will also use these meetings to highlight any work products and approaches that will contribute to deliverable development.

➔ Deliverable 2: Biweekly Project Status Meetings



Phase 2: Engagements, Data Gathering, and SWOT Analysis

2.1 Review and analyze City-provided documents and data. We will review and analyze the documents and data requested in Task 1.2. This will be used to develop a deep understanding of the community prior to engagement, as well produce an Initial Environmental Scan and Strategic Analysis that will inform community engagement

activities and strategic planning sessions.

2.2 OPTIONAL: Develop a communications strategy. At the City's option, we will develop and implement a communications and messaging strategy to build awareness of the strategic planning process, its goals, and opportunities for stakeholder engagement, while keeping the Board of Aldermen, staff, and community stakeholders informed throughout. This includes developing and reviewing messaging with the City's project team, supporting kickoff and orientation presentations for City leadership, and establishing a structure for collaboration on communications, drafting, and marketing. Communications support may include press releases, written and digital communications, messaging frameworks, and scripts for videos, radio, and podcasts, using the City's existing channels and proven methods of outreach. Should the City choose not to elect this option, we assume comparable efforts will be completed by City staff.

2.3 Develop and coordinate a stakeholder engagement strategy. We will assist the City in developing a stakeholder engagement strategy, first compiling a list of individuals and groups we should engage in this process and the best methods to leverage to engage them. We will coordinate with the City to schedule and handle logistics for internal and external engagement activities, including interviews, focus groups, community meetings, open houses, and meeting-in-a-box packages. All logistics will be managed to help ensure we create accessible involvement, promote participation, and build trust with participants in our activities.

2.4 Develop a project kickoff presentation. We will develop a kickoff presentation for the Board of Aldermen, the Executive Leadership Team, and key department staff. The presentations will introduce participants to the BerryDunn team, our approach and methodologies, project goals and objectives, the anticipated timeline, and how we intend to involve them and others in the process and the development of the Final City of Smithville Strategic Plan. In addition to this orientation session, our team can be available to present to the Board of Aldermen throughout the project as requested. We will review communications and the kickoff presentations with the City project team in a Biweekly Project Status Meeting before finalizing and distributing the final versions.

2.5 Develop interview guides. We will create interview guides tailored to the participants in the stakeholder engagement process, assessing participants' perspectives on what is working and opportunities for improvement. We understand the importance of asking the right questions and, as a result, will meet with the City to review the draft questions and incorporate feedback before finalizing the interview guides.

2.6 Develop questions to support the development of an employee survey. We will create survey questions tailored to the participants in the stakeholder engagement process, assessing participants' perspectives on what is working and opportunities for improvement. We understand the importance of

asking the right questions and, as a result, will meet with the City to review the draft questions and incorporate feedback before finalizing the employee survey.

2.7 Conduct interviews with City stakeholders. We will conduct individual and group interviews and focus groups with the Board of Aldermen, Executive Leadership Team, City committees, key staff, and community stakeholders, as appropriate, to thoroughly review and assess services and the needs of the community. These interviews will be guided by previously developed questions and protocols. Working with these wide-ranging stakeholder groups, we will help ensure alignment and cohesion for the City's strategic direction, as well as generate excitement, promote consensus and buy-in, and encourage participation and involvement in the process.

2.8 Develop the City's Social Pinpoint site and survey. We will use tools and technology that will help to encourage collaboration with the City and its stakeholders. One of these tools, a virtual engagement platform called Social Pinpoint, will be customized to encourage community engagement in the strategic planning process and to gain broad stakeholder input that will be used to inform development of the Final City of Smithville Strategic Plan. We will work in collaboration with the City to help ensure its landing page is built thoughtfully and speaks to its culture. Additionally, within this landing page, City stakeholders will have access to an idea wall, virtual survey, and other engagement tools that will help gather information related to the City's current environment and the community's desired vision for the City's future. The City's Social Pinpoint site will be live throughout the project and will be continuously updated, providing a record of project progress.

2.9 Synthesize information gathered and develop an Initial Environmental Scan. We will synthesize information gathered through quantitative and qualitative research, document and data review, Social Pinpoint, and leadership and stakeholder interviews to develop an Initial Environmental Scan. The format will be a highly visual and compelling slide deck and will be used to inform the upcoming community forums and strategic planning sessions. The presentation will provide an overview of the City's current environment and initial discovery outcomes. This will be presented to the City's project team to solicit input and gain consensus.

➔ Deliverable 3: Initial Environmental Scan

2.10 Design, prepare for, and conduct community forums. Using information gathered to date and the ICA ToP[®] facilitation methodology, we will design a community forum format that is structured to educate, inform, and engage all participants in developing a vision for the City. We will make creative use of digital applications to help ensure forums are engaging and effective. Once prepared, we will facilitate community forums to gather perspectives and ideas from the community. We will use the Initial Environmental Scan to educate the community about the current environment of the City.

2.11 Update the Initial Environmental Scan and Strategic Analysis. We will incorporate community forum outcomes in our Initial Environmental Scan, review it with the City's project team, and solicit feedback before updating it to final. The Final Environmental Scan will guide and inform strategic planning sessions, as well as generate excitement for the process among stakeholders, encourage new ideas, and foster a sense of cohesion and optimism for the future. The Final Environmental Scan will also include a detailed strengths, weaknesses, opportunities, and threats (SWOT) analysis that will assist in the development of the Final City of Smithville Strategic Plan and be made available for distribution to the Board of Aldermen, City Leadership, and the public.

➔ Deliverable 4: Final Environmental Scan and SWOT Analysis



Phase 3: Strategic Plan Development

3.1 Develop the meeting design and agendas for strategic planning sessions 1 and 2. We will design and develop agendas for strategic planning sessions 1 and 2 that are backed by the International City/County Management Association (ICMA) and other industry best practices. Each session's design and agenda will guide strategic planning progress and will include a presentation of the Final Environmental Scan and SWOT Analysis to provide participants with a shared understanding of the current environment, the trends that are affecting it, opportunities for the future, and key takeaways from engagement activities. Each in-person session will focus on building consensus and refining the strategic priorities identified, as well as the City's vision and key results. We will review the meeting designs and agendas for each session with the City's project team before updating them to final.

3.2 Facilitate strategic planning session 1. Strategic planning session 1 will focus on reviewing the City's vision, mission, values, strategic priorities, and goals with the Board of Aldermen, as well as developing new strategic goals and short-term (two to three years) and long-term (five or more year) objectives. This session will be guided by the previously developed meeting design and agenda, as well as the Final Environmental Scan and SWOT Analysis. We will use the ICA ToP[®] facilitation methodology, designed to produce group consensus, to address and resolve any conflicting values or visions.

3.3 Facilitate strategic planning session 2. Strategic planning session 2 will be conducted with the City's Executive Leadership Team. It will be guided by the previously developed meeting design and agenda, outcomes of strategic planning session 1, and the Final Environmental Scan and SWOT Analysis. We will:

- Refine the outcomes from the first session
- Develop specific, measurable, achievable, relevant, and time-bound (SMART) objectives for strategic goals and expected outcomes
- Provide performance management overview
- Develop preliminary performance measures and KPIs for each expected outcome

We will document outcomes of this session and review with the City's project team.

3.4 Finalize objectives and performance measures. With the workshops and outcomes of strategic planning sessions 1 and 2, we will work with the City's Executive Leadership Team to finalize objectives, performance measures, and KPIs. The measures will be quantifiable in terms of actual progress made toward meeting the objectives and appropriate as it relates to the City's size, operations, management, and systems. We will document outcomes, as well as a process and schedule for progress reporting to help ensure effective tracking and monitoring.

3.5 Develop and finalize the Implementation Plan template. We will develop an Implementation Plan template that will refine action steps for the strategic goals. It will also connect to resources and identify partners, department and division leads, anticipated timelines, and a reporting calendar to help enable the plan implementation and progress reporting process. This template will be customized to the City's needs and will serve as a tool to delegate responsibilities, track progress, and assist in the overall longevity and sustainability of the Final City of Smithville Strategic Plan. Using the template, we will facilitate meetings so that City leadership and staff fully own and are ready to execute the strategic plan.

3.6 Develop and present the Initial City of Smithville Strategic Plan Draft. We will develop the Initial City Strategic Plan Draft in an agreed-upon format for the final document. This plan document will include



an executive summary, as well as a detailed plan that identifies the City's shared vision, mission, guiding principles, strategic priorities, goals, objectives, and performance measures. We will review this draft with the City leadership and project team and prepare a presentation to present the Initial City Strategic Plan Draft to the Board of Aldermen in a work session. This will serve as an opportunity for City leadership to provide feedback and make any final changes.

➔ **Deliverable 5: Initial City of Smithville Strategic Plan Draft**

3.7 Develop the Final City of Smithville Strategic Plan. After reviewing the Initial City of Smithville Strategic Plan Draft with City leadership, we will incorporate requested edits and develop a graphically designed, Final City of Smithville Strategic Plan for final approval and adoption. In addition to the content described in Task 3.4, the final document will include a description of the strategic plan development process, the plan for progress monitoring and reporting, as well as the development of a one-page "Plan at a Glance" document that can serve as a standalone high-level summary of the Strategic Plan. The "Plan at a Glance" will follow the design and branding of the full Strategic Plan and include mission and vision statements, guiding principles/values, strategic priorities, strategic goals, and a link to the website where the full Final City Strategic Plan can be reviewed or downloaded.

➔ **Deliverable 6: Final City of Smithville Strategic Plan**

3.8 Conduct project closeout activities. Once the strategic planning effort is complete, we will perform closeout activities, including providing the City with documentation developed and collected during the process, and conducting lessons learned and knowledge-sharing activities. Conducting this task will equip the City with the tools needed to continue to progress toward its vision and to successfully implement its plan, even after the project is complete.

Proposed Schedule

While projects vary, our typical strategic planning process takes six to twelve months. In Table 1 below, we highlight our proposed project schedule for the City's requested work effort, which we anticipate will require seven months. We are happy to adjust this schedule to best accommodate the City's needs, as appropriate.

Table 1: Proposed Schedule

	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
1	█	█	█	█	█	█
2		█	█	█		
3				█	█	█

Participant Responsibilities

Commitment from all project participants is critical to producing a successful outcome; however, we understand that the project participants have regular commitments outside this project. Therefore, we will work as independently as possible, plan and communicate well, and bring in City staff and stakeholders as needed and in a manner that facilitates tangible contributions and results.

Table 2 below outlines the roles, responsibilities, and estimated time commitments we anticipate from City personnel and stakeholders in this strategic planning process. We will be able to better estimate City involvement in the eventual implementation effort when during Phase 1.

Table 2: Services Provided by BerryDunn and the City

Role	Services Provided by BerryDunn and the City
BerryDunn Consulting Team	
Project Principal	Our project principal will maintain overall responsibility for the services provided to the City, help ensure the commitment of our firm and appropriate resource allocation, and review and approve all deliverables in accordance with our quality assurance processes.
Project Manager	Our project manager will serve as the City’s primary point of contact, leading day-to-day project management, staff oversight, and the development of the Project Work Plan and Schedule. She will guide the analysis and development of deliverables, design and support strategic planning sessions and interviews, provide subject matter expertise, and present findings and the Final City of Smithville Strategic Plan.
Facilitators	Our facilitators will collaborate with our proposed project manager on the facilitation approach, participate in leadership meetings, facilitate interviews, focus groups, community forums, and strategic planning sessions, and contribute to deliverable development.
Research Analyst	Our research analyst will document engagement and strategic planning outcomes, assess the City’s current environment, analyze existing data, and research best practices and industry standards.
City Staff and Stakeholders	
Sponsor and Project Team	<ul style="list-style-type: none"> ▪ Provide support, sponsorship, and overall direction and tactical vision for the project ▪ Commit/assign resources to the project ▪ Participate in project kickoff meeting and stress goals and objectives for the project to City staff ▪ Provide executive-level decision-making when needed and maintain overall responsibility for the project ▪ Distribute communications, as necessary, that support the project and provide it with adequate visibility and priority



Role	Services Provided by BerryDunn and the City
	<ul style="list-style-type: none"> ▪ Maintain overall responsibility for the project and act as main point of contact between BerryDunn and the City ▪ Circulate deliverables for review and collect feedback, and provide sign-off ▪ Participate in key work sessions ▪ Assist in collecting background documentation and share with BerryDunn in advance of our work ▪ Provide names and contact information for people involved in the project ▪ Provide necessary feedback and subject matter expertise to help inform BerryDunn’s project deliverables
Board of Aldermen	<ul style="list-style-type: none"> ▪ Participate in project kickoff orientation/meeting ▪ Participate in interviews and focus groups ▪ Participate in strategic planning session 1 ▪ Participate in a presentation of the Initial City of Smithville Strategic Plan Draft and adopt the Final City of Smithville Strategic Plan Draft
Executive Leadership Team	<ul style="list-style-type: none"> ▪ Participate in project kickoff orientation/meeting ▪ Participate in interviews and focus groups ▪ Participate in strategic planning session 2 ▪ Participate in a workshop to finalize objectives, performance measures, and KPIs ▪ Participate in the review of the Initial City of Smithville Strategic Plan Draft ▪ Participate in work session to develop the implementation plan, refine action steps for the strategic goals, and review the action plan
Staff	<ul style="list-style-type: none"> ▪ Participate in project kickoff orientation/meeting ▪ Participate in interviews and focus groups ▪ Participate in the review of the Initial City of Smithville Strategic Plan Draft ▪ Participate in the development of the implementation plan
Residents, Community Groups, and Key Partners	<ul style="list-style-type: none"> ▪ Participate in engagement activities including Social Pinpoint and the survey ▪ Participate in community forums



(It is preferred that the Bid Response use this Form, however, the City reserves the right to accept Bids which provide the necessary information without using this form)

RFQ #26-03 CITY OF SMITHVILLE STRATEGIC PLAN UPDATE

PROPOSAL RESPONSE FORM

I, Seth Hedstrom, hereby representing
(Agent Submitting RFQ)

Berry, Dunn, McNeil & Parker, LLC, have read and reviewed the attached specifications.
(Firm or Company)

I state the hereby offer meets or exceeds all requirements. All other required information must be attached.

Berry, Dunn, McNeil & Parker, LLC
Company Name

2211 Congress Street
Address

Portland, Maine 04102
City/State/Zip

(207) 541-2200
Telephone

01-0523282
Tax ID No.

Seth Hedstrom
Authorized Person (Print)


Signature

Principal
Title

February 4, 2026
Date

shedstrom@berrydunn.com
E-Mail Address

Appendix A. Resumes

Seth Hedstrom, PMP[®], LSSGB

Principal | Berry, Dunn, McNeil & Parker, LLC



Seth is a principal and leads BerryDunn's Local Government Practice Group. He has more than 15 years of experience assisting public-sector clients. His experience includes technology planning, organizational needs assessments, system planning and procurement, and the implementation of enterprise-wide information systems. Seth often serves in a leadership role on strategic planning projects and manages and oversees project progress and issue escalation and resolution with executive project sponsors.

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BS, Business Management, Babson College
- Project Management Professional[®] (PMP[®]), Project Management Institute[®]
- Lean Six Sigma Green Belt Certified
- Diversity and Inclusion Certificate, Cornell University
- Associate Member, Government Finance Officers Association
- Affiliate Member, International City/County Management Association

EXPERIENCE

Strategic Planning: Seth has served as a project principal on dozens of BerryDunn's strategic planning projects across the country. He has overseen the project management, community engagement, strategic planning, and implementation phases of the strategic planning life cycle for a variety of organizations of different sizes, scopes, and complexities.

Project Management: Seth has served in leadership on most of BerryDunn's local government strategic planning projects. He also has managed system selection and IT strategic planning projects for some of BerryDunn's largest local government clients. He helps ensure projects are conducted in a high-quality manner, as well as stay on time and on budget.

Operational and Organizational Assessments: Seth has been involved in numerous operational and organizational assessment projects, which involve current environment analysis, future state planning, and the development of an implementation plan for incremental improvements over a multiyear planning horizon to align with client resources.

Governance and Strategic Decision-Making: Seth has led our clients through many of the complex decision points and issue-resolution processes typical of business process analysis and system assessment and selection projects. He helps clients establish decision-making structures that will guide them as they make decisions based on analysis while also building consensus.

CLIENT LIST

- City of Blue Springs, MO
- City of Capitola, CA
- City of Cooper City, FL
- City of Foley, AL
- City of Lauderhill, FL
- City of Margate, FL
- City of Milton, GA
- City of New Braunfels, TX

Charline Petit Homme, MPA, Prosci® CCP, PMP®

Manager | Berry, Dunn, McNeil & Parker, LLC



Charline is a manager in our Local Government Practice Group and is particularly skilled in leading clients through complex transformational initiatives, including strategic planning projects. She is a strong facilitator and is certified in the ICA ToP® facilitation methodology. Her experience also includes organizing and leading groups through the adoption of new ideas and concepts, and promoting buy-in. She brings in-depth knowledge and involvement with strategic planning, change management, and relationship building through her strong communication, leadership, and project management skills. She is especially skilled at facilitating stakeholder engagement efforts and synthesizing outcomes to optimize results for her clients. Prior to joining BerryDunn, Charline spent multiple years serving the public-sector, supporting and conducting field research, data collection, organizational reporting, gap analysis, and recommendations development.

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MPA, Clark University
- BA, Political Science, Clark University
- Prosci® Certified Change Practitioner (CCP)
- Certified Project Management Professional® (PMP®)
- Institute of Cultural Affairs (ICA) Technology of Participation® (ToP®), Certified

EXPERIENCE

Strategic Planning: Charline regularly leads and facilitates strategic planning efforts with BerryDunn's municipal and county government clients. She leverages her ICA ToP® certification to help groups achieve consensus even when there are competing priorities and challenging constraints. She utilizes her project management training to keep large strategic planning efforts on schedule and on budget. She has served as project manager on recent or ongoing strategic planning initiatives, including those for the Attleboro Redevelopment Authority and the Towns of Chelmsford and Holliston, Massachusetts.

Project Management and Support: Charline is a certified Project Management Professional® (PMP®) and has served as engagement or project manager for a number of our engagements, including the City of Toledo, OH. In these roles, Charline maintains a constructive and clear line of communication between the client and BerryDunn. In addition, she monitors the progress of the project, tracks the initiation and completion of tasks and milestones, and facilitates status update meetings and information-gathering activities.

Organizational Development: Charline is skilled in organizational development with a strong focus on evaluating current processes and operations to drive efficiency and growth. She is experienced in conducting in-depth assessments of organizational workflows, identifying gaps, and recommending tailored solutions for optimization. She assists her clients align organizational processes with strategic goals to enhance overall performance and employee engagement.

CLIENT LIST

- City of Cooper City, FL
- City of Lauderdale, FL
- City of Milton, GA
- Marquette County, MI
- City of Homestead, FL
- City of Apopka, FL

Karen Whichard, MPA, Prosci® CCP

Manager | Berry, Dunn, McNeil & Parker, LLC



Karen is a manager in BerryDunn's Local Government Practice Group. She is a seasoned public sector leader with 19 years of experience in both small and large local governments. Her time with local government organizations ranges from working with a town of 15,000 residents to playing a key role for the City of Charlotte, North Carolina, which is home to nearly 900,000 residents. She boasts a significant track record of successfully building consensus, solving complex problems, and navigating diverse political environments to implement the policy vision of elected bodies.

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MPA, University of North Carolina Charlotte
- BA, Journalism and Mass Communication, University of North Carolina at Chapel Hill
- Prosci® Certified Change Practitioner

EXPERIENCE

Strategic Planning: Both during her time in the public sector and at BerryDunn, Karen has successfully led the development of strategic plans. For Karen, a successful plan reflects community goals, staff expertise, and elected official policy direction. Each of these components is critical to a plan that is able to be implemented successfully. In addition to the right inputs, Karen's background in city budget development allows her to guide her clients as they integrate plan objectives with budget priorities. During Karen's time with the Town of Davidson, North Carolina, she directed the creation and adoption of the 2020-2021 two-year strategic plan including managing the biennial town board retreat. While working for the City of Charlotte, Karen served as the lead budget analyst for the Strategy and Budget Department. In this role, she contributed to the City's Environmental Focus Area Plan and the Strategic Energy Action Plan.

Organizational Development: Building upon her significant local government expertise, Karen has led successful organizational assessments for BerryDunn clients. She brings a deep understanding of the challenges of local government service delivery, having served both in operating departments and executive management roles. Her ability to connect to staff at all levels as a project manager helps ensure the final recommendations are actionable and relevant to the organization. As assistant county manager for Gaston County, North Carolina, Karen was a member of the executive leadership team. In this role, she helped rebuild the relationship with a key community non-profit active in child welfare and foster care after years of challenges. She also implemented a change management program to improve workplace culture in the Division of Social Services – Child Welfare Division. Karen reformed the Health & Human Services Division to increase collaboration, promote efficiency, and improve client outcomes.

CLIENT LIST

- City of Apopka, FL
- City of Foley, AL
- City of Homestead, FL
- City of Margate, FL
- City of New Braunfels, TX
- City of Sarasota, FL
- DuPage County, IL
- Lake County, IL
- Metro Nashville and Davidson County, TN
- St. Johns County, FL

Lukasz Stykowski, MPP, LSSGB

Consultant | Berry, Dunn, McNeil & Parker, LLC



Lukasz is a consultant in our Local Government Practice Group and has a background in government services consulting, management analysis, and lean business processes. He brings firsthand public-sector experience through previous roles with three different cities, which allows him to better understand the needs of our clients. As a consultant with BerryDunn, Lukasz has worked on projects focused on change management, employee engagement, strategic planning, and system selection and implementation. He has worked with clients to help ensure business continuity of organizational changes, creating roadmaps for future success, and end user acceptance of new software systems.

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MA, Public Policy, Arizona State University
- BS, Biological Studies, University of Illinois
- Lean Six Sigma Green Belt (LSSGB) Certified

EXPERIENCE

Business Analysis: Lukasz leverages his strong background in research and analysis to provide high-quality business analysis to a mix of large- and small-scale local government clients. He understands the challenges local governments and municipal utilities face with limited and competing resources. Lukasz has relevant experience from his work with municipal permitting. He has worked with clients to assess permit policies and standard operating procedures, systems review, revenue capture, and overall operations. Through his efforts, Lukasz helps improve the efficacy and performance of any organization he works with.

Government Services Consulting: During his time with the Bronner Group in Chicago, Illinois, Lukasz provided risk identification and recommendations based on reviews, observations, and interviews. He focused on improvement of performance and operations through conducting analyses, preparing reports, and establishing criteria to help achieve client goals.

Management Services: While working for the Village of Algonquin, Illinois, Lukasz collaborated with staff to build shared ownership of new workflows through change management. He guided staff during the implementation of a modernized ERP system and developed recommendations for change and optimization. He also drafted an RFP for a new website while working for the Village of Streamwood, Illinois. He worked on multiple management aspects in his role including developing a social media strategy, a business survey, and drafting an employee procedures handbook. These projects contributed to increased community engagement, success with employee turnover, and overall improvement of processes and procedures.

Budget Outreach: Lukasz brings experience with budget outreach from his time with the City of Tempe where he identified strategies and created an outreach plan to increase civic engagement in city affairs. He revised the City's budget document and helped to create budget education materials for residents and youth.

CLIENT LIST

- City of Homestead, FL
- City of San Jose, CA
- Metropolitan Government of Nashville & Davidson County, TN
- Sheboygan County, WI
- Williamson County, TX



Appendix B. Strategic Plan Work Samples

- ❖ **The City of Blue Springs, Missouri** – Strategic Plan 2025-2030
- ❖ **The City of New Braunfels, Texas** – Strategic Plan 2024-2029
- ❖ **St. Johns County, Florida** – Strategic Plan, 2024-2029



The City of

Blue Springs

Missouri

STRATEGIC PLAN • 2025-2030

Community Safety and Wellbeing

OUR GOAL



Maintain a safe
environment
where people
feel and are secure.

OBJECTIVES

- Use developing technologies, equipment, systems and facilities to address safety and reduce incidents of crime.
- Expand outreach programs to increase community engagement and help residents take proactive steps to protect themselves, their property, and their neighborhood.
- Create a plan for an Animal Control shelter to support the safety of people and animals.
- Increase police staffing levels and retention efforts to meet population growth and call load.
- Identify, coordinate, and create resources to provide easy access and support for vulnerable populations.





PERFORMANCE MEASURES

- Implement Drone as First Responder Technology (DFR) by December 2027.
- Report crime rates.
- Expand Flock Camera Program based on high accident and crime areas.
- Increase crime prevention initiatives.
- “Ghost car” program to increase visibility 2025.
- Increase Girls on Fire and Life Sports sessions by once per year.
- Complete monthly/bimonthly officer/community meetings/forums.
- Attend four recruitment fairs annually.
- Complete Officer Mental Health Visits biannually.
- Hire two officers per 1,000 population by December 2030.
- Develop a long-term plan for Animal Control by June 2027.
- Create an action plan to support vulnerable populations by September 2026.



Organizational Health

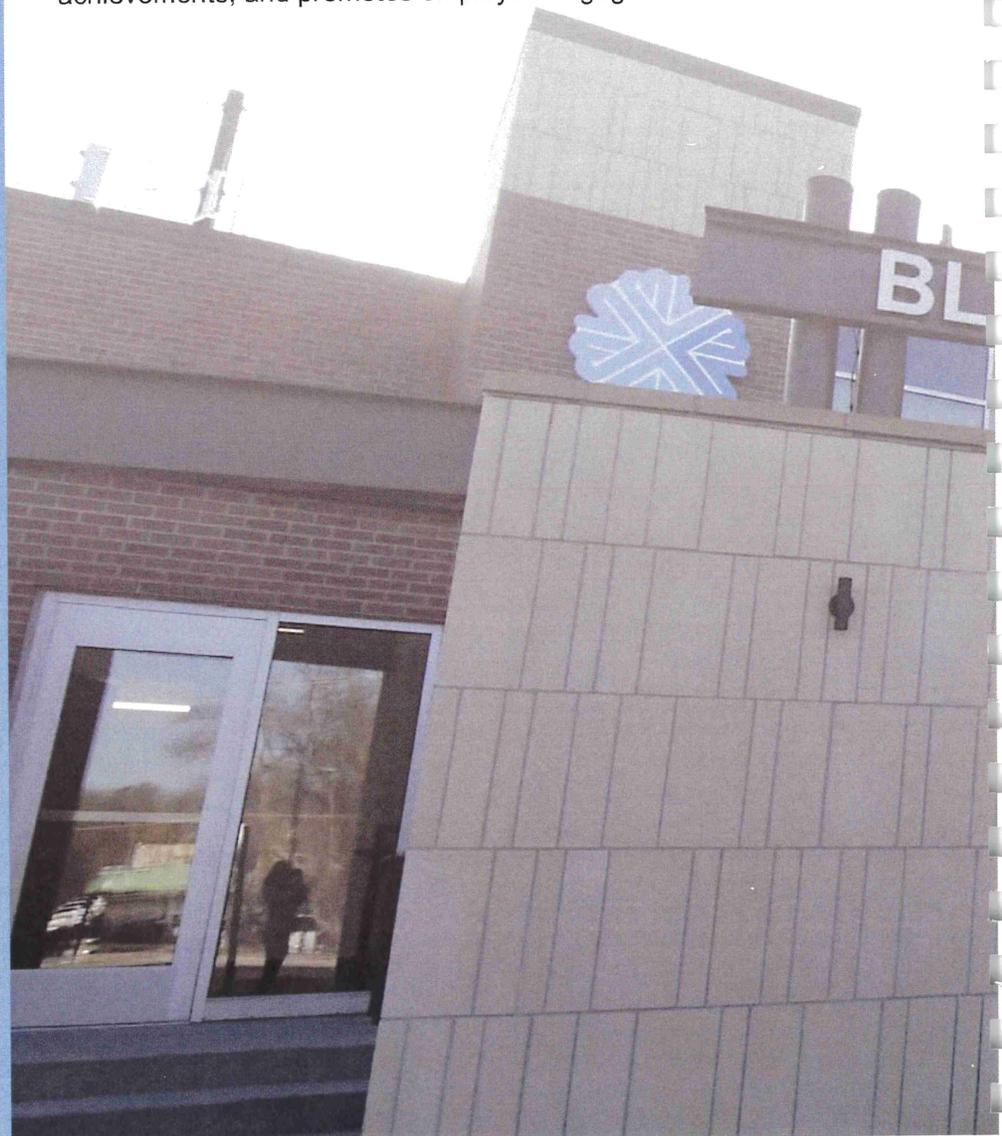
OUR GOAL



Create an environment that encourages collaboration, teamwork, integrity and accountability to empower staff to deliver exceptional service for the Community.

OBJECTIVES

- Leverage modern technology and system capabilities to improve operations.
- Invest in personnel, training, equipment, technology and professional education to enhance the delivery of public services and support professional growth.
- Create opportunities for cross-department collaboration to reduce silos and enhance communication.
- Strengthen continuity of operations by documenting key processes and implementing knowledge transfer practices.
- Prioritize a safe working environment by supporting a proactive Safety Committee that identifies risks, promotes safe work practices and helps to ensure all employees have the tools and training needed to help prevent injuries.
- Elevate a culture that celebrates wins, recognizes significant achievements, and promotes employee engagement and wellness.



PERFORMANCE MEASURES

- Number of existing processes improved annually.
- Increase use of the learning management system.
- Increase staff training hours.
- Number of dollars spent on professional education for staff.
- Number of conferences attended.
- Hold monthly Process Improvement Team meetings.
- Number of critical processes documented for all departments.
- Create an employee newsletter by October 2025.
- Hold monthly Safety Committee meetings.
- Host Wellness Fair annually.
- Number of staff engagement events.







City of
New Braunfels

STRATEGIC PLAN 2024-2029

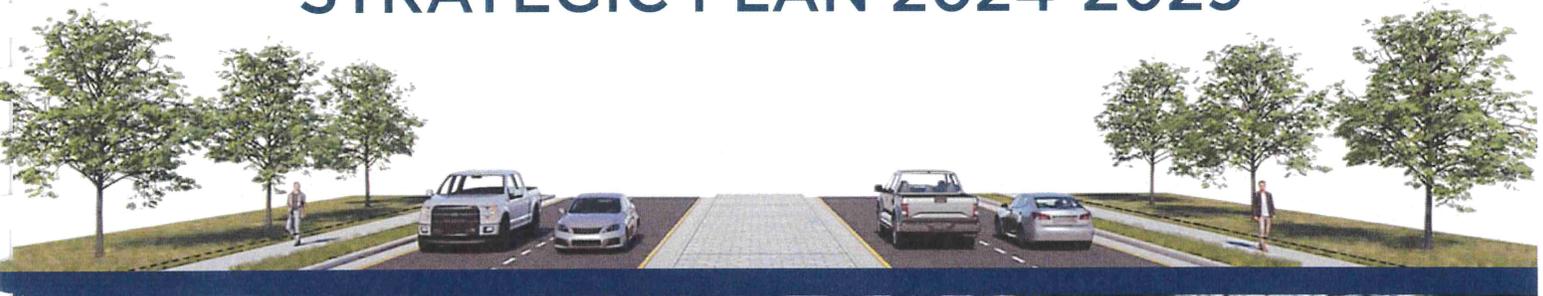




Table of Contents

Letter from the Mayor	3
Who we are	4
Plan at a glance	5
Strategic Priorities	
Economic Mobility	6
Enhanced Connectivity	8
Community Identity	10
Organizational Excellence	12
Community Well-Being	14
Why a strategic plan?	16
How did we arrive at this plan?	17
What's Next?	18
Acknowledgements	19



Adopted March 2024

From the Mayor

As the Mayor and a member of your City Council, I understand that you have entrusted the leaders of this organization to guide our community through making strategic investments that shape our community and have a lasting impact on the lives of all current and future residents.

I am proud to share with you the 2024-2029 City of New Braunfels Strategic Plan. This plan will set the foundation for the next phase of our city's growth and development. It serves as a roadmap, outlining our priorities, goals, and the objectives required to achieve them.

Getting to this point was a collaborative and interactive process involving input from community leaders, stakeholders, and most importantly, you – the residents, the heart and soul of our city. Hearing directly from the residents of New Braunfels about their vision for the future was a vital component of the strategic planning process. We gathered information from 140 stakeholder interviews, 4 community forums, 99 website comments, and 662 survey responses. Your input was instrumental in crafting a plan that truly reflects the goals and needs of our community.

This plan will help us build a New Braunfels that is innovative and sustainable while preserving our unique heritage and community identity. Through implementation of this plan, we hope to address current challenges, capitalize on opportunities, and ensure that our community thrives for generations to come.

We have operationalized the plan through the development of objectives and performance measures that align to five strategic priorities, which can be found starting on page 5.

I encourage all New Braunfels residents to actively participate in continually improving our community that we are all so proud of. Your insights, ideas, and perspectives are invaluable as we shape the future together. Attend City Council meetings, join a City Board or Commission, complete any City surveys you see, participate in City University, Citizens Police Academy, or Citizens Fire Academy, visit our beautiful parks and libraries, and connect with your community and other residents at community events like Wassailfest, Saengerfest, and Live @ Landa.

I am confident that together, we will build the New Braunfels that we and generations to come deserve – a place where opportunity flourishes and the quality of life is unmatched.

Thank you for your commitment to the future of New Braunfels.



Neal Linnartz

Mayor of New Braunfels



Our Mission

The City of New Braunfels serves the community by planning for the future, responding to community needs, and preserving our natural beauty and unique heritage.

Our Vision

The City of New Braunfels is a vibrant and inviting place where people enjoy meaningful community connections, unique cultural opportunities, and an exceptional quality of life surrounded by world class natural resources.



Who We Are

Core Values

Integrity

We operate with integrity, holding ourselves to the highest standards of ethical conduct, transparency, accountability, and performance.

Service

We engage with our community in an intentional and helpful manner to find solutions for the people we serve.

Visionary Leadership

We embrace new and innovative approaches, courageous decision-making, and implement solutions that are in the best long-term interest of the community.

Stewardship of Resources

We make decisions that promote long-term viability of our financial and natural resources and are prudent and responsible so that our community is sustained into the future.

Cultural Heritage

We celebrate our unique and diverse cultural heritage, community spirit, and work to promote a sense of belonging for all people in New Braunfels.

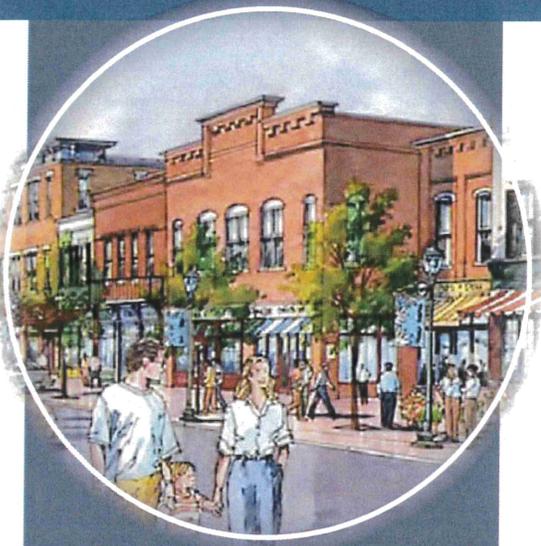
Plan at a Glance



Economic Mobility

Objectives

1. Incentivize mixed-use developments and redevelopments in targeted locations to create a built environment with integrated housing, commercial centers, and opportunities for improved connectivity.
2. Support Confluence, the New Braunfels Chamber of Commerce Economic Development Strategic Plan, by helping to ensure a community that supports the targeted industries and increases the diversity of job opportunities in the community.
3. In partnership with the New Braunfels Economic Development Corporation (NBEDC) and New Braunfels Utilities, develop a cohesive framework for economic development incentives that encourage a built environment that results in enhanced walkability, mixed housing types, and the co-location of commercial and residential uses.
4. To support the development of additional workforce housing units, create an incentive policy to include variances for height restrictions, density limits, parking minimums and other requirements as well as encouraging the use of Public Facility Corporations and Tax Increment Financing.
5. Establish programs and opportunities that leverage private and public sector dollars for use as gap financing in the production and preservation of affordable workforce housing units.
6. Continue to develop a series of policies and programs to encourage the construction of different housing types, such as accessory dwelling units, to increase the diversity of the housing supply, especially in areas of the community that are undergoing changes to current development patterns and where demand is outpacing supply.
7. Look for opportunities to incentivize child development centers to increase the supply of high-quality childcare in the community that supports the local workforce.
8. In partnership with the NBEDC, undertake an asset and ecosystem mapping exercise to identify the entrepreneurial assets available in the community and work toward closing the gaps identified.
9. Identify and secure a mid-to-long-term leasing or ownership opportunity for a business incubator to help foster the development of new, locally grown businesses and support entrepreneurship.



OUR GOAL

Create an economic ecosystem where all people have access to housing and meaningful work to live self-reliantly within the community.



Economic Mobility

Performance Measures

Milestone

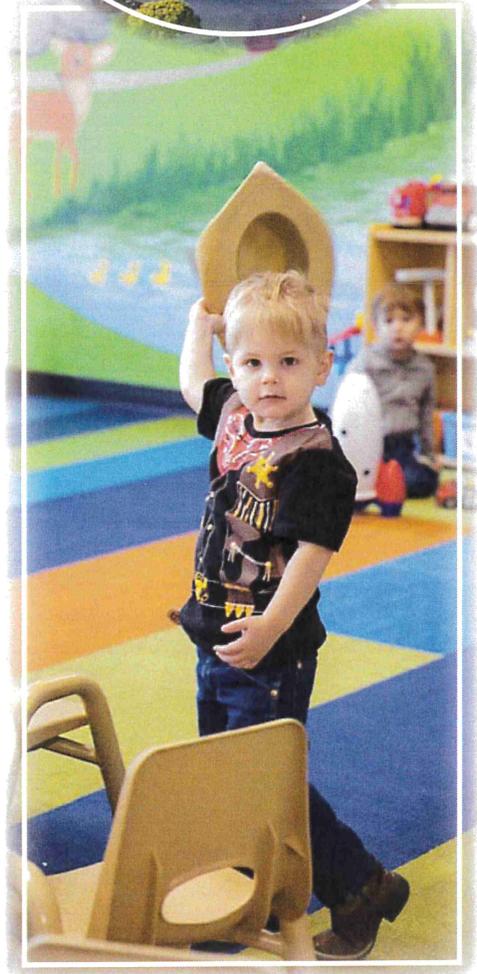
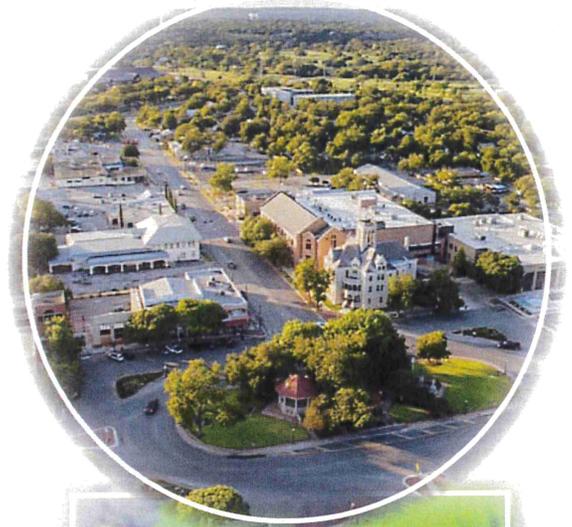
- Complete an entrepreneurship asset inventory by the end of 2025.
- In partnership with the NBEDC, establish funding source(s) dedicated to the creation of additional workforce housing units.
- Issue Notice of Funding Availability (NOFA) to explore partnership opportunities for the creation of additional affordable housing units.

Output

- Increase the number of new affordable housing units produced each fiscal year.
- Increase the number of affordable housing units preserved each fiscal year.

Outcome

- Two percent increase in median income annually year over year.
- Increased percentage of citizens who work and reside in New Braunfels.
- Reduce collective percentage of household income dedicated to housing and transportation.
- Decrease in percentage of cost-burdened households.
- Increase National Citizen Survey rating of "Variety of housing options."
- Increase National Citizen Survey rating of "Availability of affordable quality housing."
- Increase National Citizen Survey rating of "Availability of affordable quality childcare/preschool."



Enhanced Connectivity

Objectives

1. Identify and establish planning, capital, and operating funding to support and maintain a well-connected transportation network serving pedestrians, bicyclists, transit users, children, older individuals, individuals with disabilities, motorists, and freight vehicles.
2. Establish appropriate level of General Fund funding to support the ongoing maintenance of the City's multimodal transportation network to ensure new capital investments in mobility are sustained over time.
3. Implement improved local and regional public transportation services to connect the community to employment, education, healthcare, recreational and other destinations.
4. Collaborate with governmental partners to improve transportation access and connections throughout the region.
5. Develop a sidewalk inventory and process to assess pedestrian connectivity and Americans with Disabilities Act (ADA) accessibility and establish priorities for funding, constructing and maintaining pedestrian improvements.
6. Inform residents and visitors of transportation options on the City's website and social media platforms, including transit services, sidewalks, trails, and bikeways.

OUR GOAL

Coordinate land use
with strategic investments
in multimodal transportation,
so residents and visitors
can travel safely and easily
throughout the City.



Enhanced Connectivity

Performance Measures

Milestone

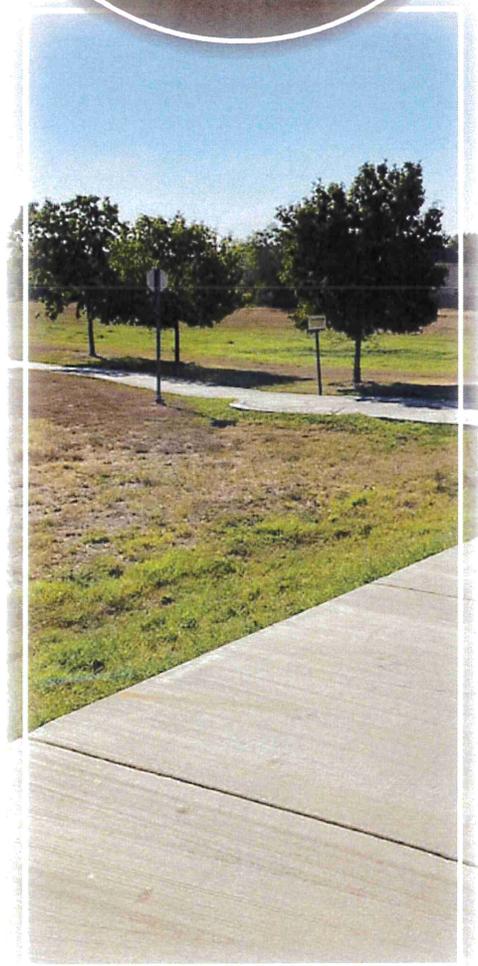
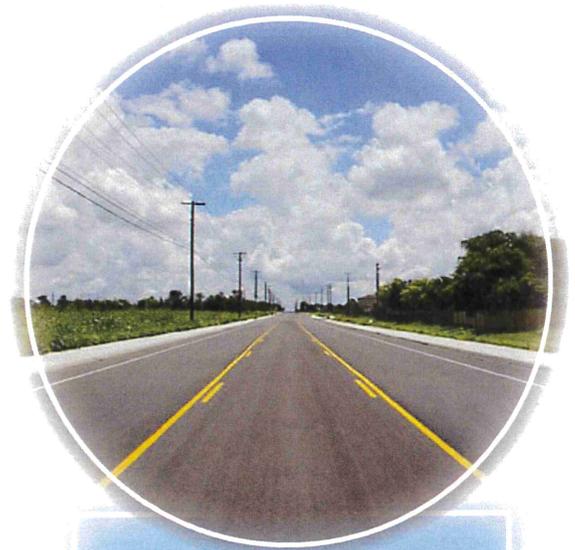
- Assess vehicle, pedestrian and bicycle network connectivity and develop baseline connectivity rating.
- Set a baseline traffic congestion measure.
- Complete a sidewalk Inventory.
- Complete an ADA transition plan.
- Begin citywide micro transit service by the end of FY 2025.
- Develop an interactive trail and shared use path map and feature on the City's website and social media platforms.

Output

- Increase the recurring funding for bikeway and trail maintenance annually.
- Set a baseline of existing bikeway, trail, and sidewalk miles.
- Set total number of linear feet of gaps and measure progress made through redevelopment, capital investment, etc.

Outcome

- Increase National Citizen Survey overall satisfaction in the "overall quality of the transportation system."
- Increase National Citizen Survey overall satisfaction with "ease of travel by bicycle."
- Increase National Citizen Survey overall satisfaction with "ease of travel by walking."
- Add measures for connectivity rating, congestion, and transit in years 3 - 5 of the plan once the milestone measures are complete.
- Increase in walk and bike Score.
- Increased bikeway, trails, and sidewalk miles.



Community Identity

Objectives

1. Initiate the update to Envision New Braunfels, the City's comprehensive plan, and use the Land Use Fiscal Assessment to bring a data-driven element to the Future Land Use Map.
2. Adopt the new Land Development Ordinance that implements goals of our residents identified in Envision New Braunfels, including but not limited to protecting historic structures, preserving and increasing green space and tree canopy, protecting natural resources, and safeguarding the character, integrity, and stability of neighborhoods.
3. Develop and implement comprehensive brand identity that represents the entire organization, clearly articulates and celebrates the culture of New Braunfels, highlights the unique assets of the community, and supports economic development and tourism efforts as well as City operations, including recruitment and retention.
4. Develop an Arts and Culture Master Plan to define the role of the City and key community partners in supporting arts and culture to improve quality of life and economic development in New Braunfels and to guide the City's strategic plans and future investments.
5. Continue engagement with the arts and culture sector to preserve and support the community's culture and identity through community events, arts programming, and classes via the Library and Parks & Recreation.

OUR GOAL

Foster a sense of community
for all City residents,
preserve the City's key
historic and cultural assets,
expand cultural programming,
and take advantage of
development opportunities
that complement the
City's unique heritage.



Community Identity

Performance Measures

Milestone

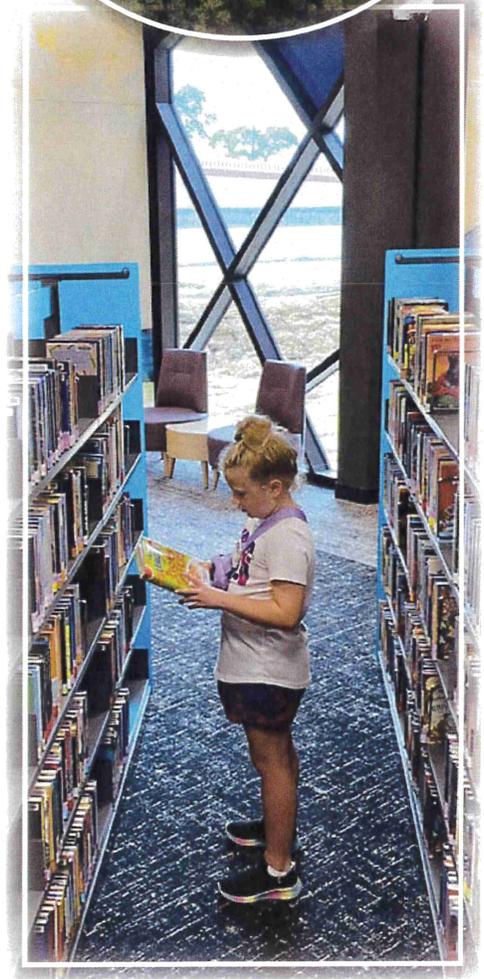
- Begin the adoption process for the Land Development Ordinance by December 2024.
- Adopt updated Envision New Braunfels by Summer 2026.
- Complete Brand Strategy by Summer 2026.
- Allocate resources and recurring funding dedicated to community wide beautification and streetscape enhancement.

Output

- Increase Library items per capita.
- Increased historic preservation programming and outreach.
- Increased Library program participants.
- Increased public art and/or placemaking installations.

Outcome

- Increase National Citizen Survey overall satisfaction with "Preservation of the historical or cultural character of the community."
- Maintain National Citizen Survey overall satisfaction with "Opportunities to attend cultural/arts/music activities" above the national benchmark.
- Maintain National Citizen Survey overall satisfaction with "Opportunities to attend special events and festivals" above the national benchmark.



Organizational Excellence

Objectives

1. Formalize a succession planning process to ensure knowledge transfer and successful transitions in leadership roles.
2. Continue to utilize cross departmental teams to enhance services provided to internal and external customers.
3. Review and present customer satisfaction survey results and identify areas of improvement.
4. Continue to hold stakeholder workshops/focus groups to collect qualitative feedback to enhance the customer experience.
5. Develop a comprehensive recruitment strategy to ensure the City has high-quality candidate pools from which to hire the next generation of public servants.
6. Continue to refine departmental performance measures to make sure they are relevant and add value.
7. Continue to develop alternative funding strategies to support technology and heavy equipment replacement, including public safety vehicles.
8. Update the City's Capital project and funding methodology and process to include anticipated ongoing operational costs associated with new capital investments.
9. Develop staffing and resource allocation strategies driven primarily by data and key performance indicators.
10. Considering statutory and market-based factors, continue to diversify revenue streams to support long-term fiscal sustainability of the organization.

OUR GOAL

Use data-driven decision-making to provide efficient, effective, and high-quality services.



Organizational Excellence

Performance Measures

Milestone

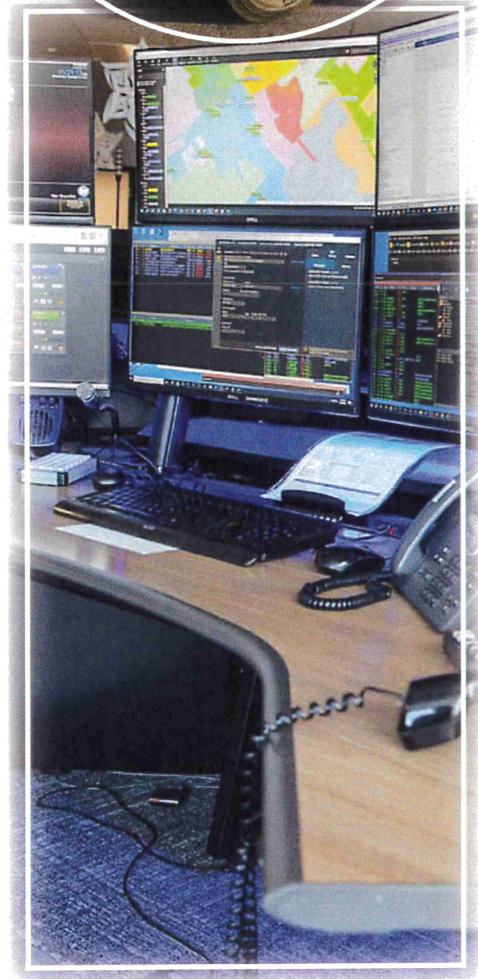
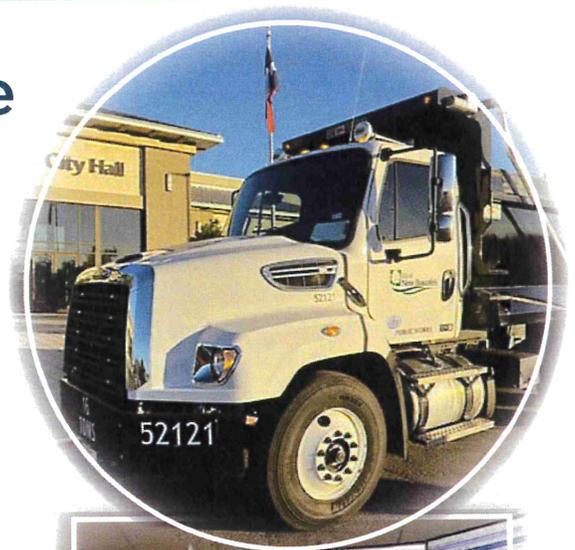
- In conjunction with department heads, Human Resources develops and submits departmental succession plans to the City Manager's Office by the end of FY 2025.
- Establish funding options and adopt a strategy for all heavy equipment assets, including fire apparatus by the end of FY 2025.
- Present updated benchmark cities to City Council by the end of FY 2024.
- Conduct an annual fee evaluation process for the next two fiscal years.
- Incorporate fee schedule in the Adopted Budget process by FY 2026.
- Establish technology replacement schedule and define annual funding requirement.
- Present departmental KPIs bi-annually to City Council beginning in FY 2025.

Output

- Increase online customer survey participation annually.
- Attend or host eight recruiting events per fiscal year.
- Seventy percent of positions with sufficient data at or above market per biennial market study.
- Reduction in the percentage of separation indicating compensation and advancement opportunities as reason for leaving.

Outcome

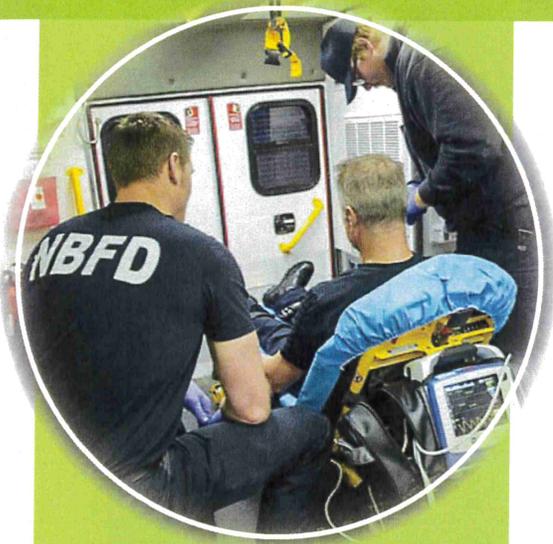
- Maintain AA bond rating.
- Maintain annual full time turnover rate of 15% or lower.
- Reduce reliance on General Fund primary revenue sources (property taxes, sales taxes, and franchise fees) by ensuring that non-primary revenues are aligned with the market and achieving the appropriate level of cost recovery.
- As measured through the national citizen survey, continue to increase the percentage of participants that actively use the City's website and social media platforms to learn about city news and updates.



Community Well-Being

Objectives

1. Implement the Mobile Integrated Health unit and scale it to meet demand.
2. Complete the Parks Master Plan to identify needs including strategic land acquisition, facilities, trails, and programming.
3. Create a future bond proposition and pursue other funding sources to support quality of life investments, specifically focused in the underserved areas of New Braunfels, including those identified in the 2025 Parks Master Plan.
4. Develop capital and staffing investments that improve safety, reduce heat islands, and encourage transportation modes that support healthier lifestyles and exercise such as biking, walking and running.
5. Look for opportunities to reconnect the community by mitigating highways, waterways and other transportation facilities that create barriers to community connectivity.
6. Formalize the partnership with Police, Fire, and the City's non-profit/ social sector, to respond to critical issues, address non-emergency social services and evaluate holistic public health and safety needs.
7. Evaluate public safety front line equipment to ensure they meet the demand and the call "type," where the response resource matches the risk.
8. Continue to develop alternative public safety deployment strategies that align to call type and statutory requirements to allow for efficient use of current and future staff resources.
9. Support the New Braunfels Youth Collaborative and other organizations to ensure middle and high school aged youth in the community can flourish intellectually, physically, and emotionally.



OUR GOAL

Implement services
that enhance health and
well-being to improve
overall quality of life
for residents.



Community Well-Being

Performance Measures

Milestone

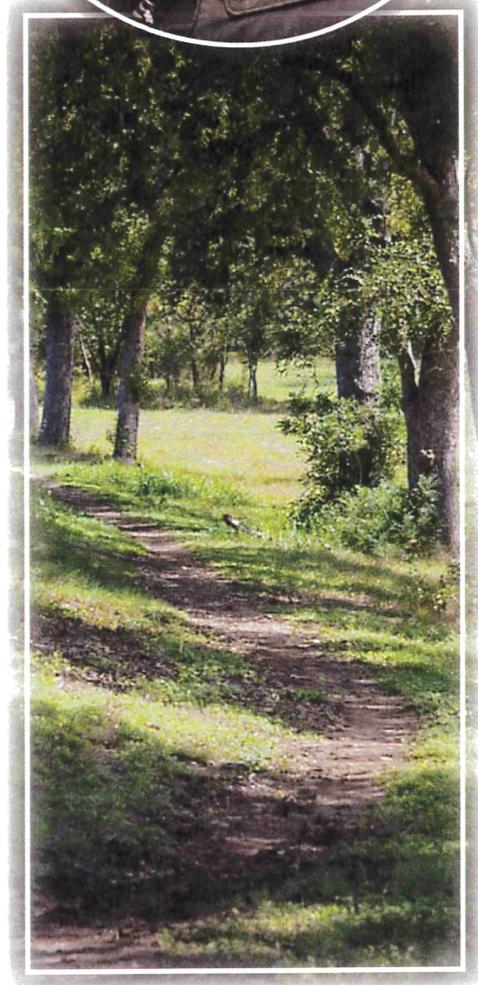
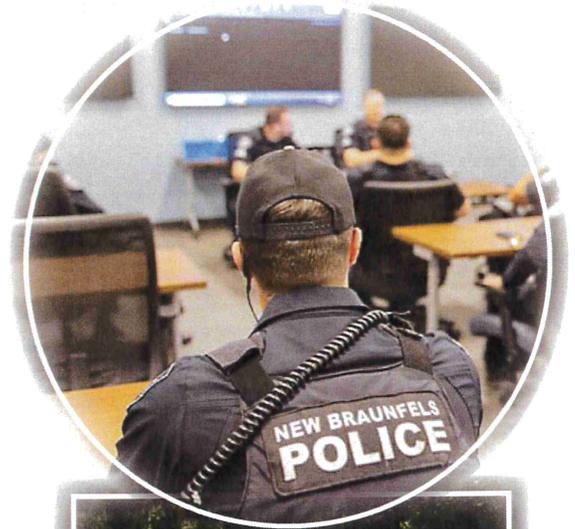
- Complete Parks and Recreation Master Plan by December 2025.
- Implement top three priorities from the New Braunfels Street Safety Action Plan.
- Formalize fire-police community task force by the end of FY 2025.

Output

- Reduce the number of 911 medical call super users by 5% annually.
- Seek opportunities for continual improvement of response times.
- Maintain Average Response Time of 5 minutes or less for structure fires inside the City limits.

Outcome

- Progress toward acres of parkland per 1,000 residents metric as established by updated Parks and Recreation Master Plan.
- Maintain National Citizen Survey overall satisfaction for "Overall health and wellness opportunities."
- Maintain National Citizen Survey overall satisfaction for "Overall feeling of safety."



Why a strategic plan?

Charts the Course

The Strategic Plan's five-year timeline allows for thoughtful sequencing of initiatives. The alignment with the City's annual budget process creates a stronger connection between finances and operations. With the Strategic Plan as a guide, other City plans and initiatives will be built to align. In addition to priorities, goals and objectives, this plan includes performance measures for government transparency, accountability, and ongoing improvement.

Results for the Community

We know the residents of New Braunfels have high standards and aspirations for our City. We enjoy a high quality of life here and want to remain an excellent place to raise a family even as we continue to grow and evolve. The City's Strategic Plan lays a foundation for progress, defines a shared vision for the future and focuses City resources on five key strategic priorities: Economic Mobility, Enhanced Connectivity, Community Identity, Organizational Excellence, and Community Well-Being. These priorities, and their supporting goals and objectives, came from considerable community input and feedback. These priorities drive us toward meaningful outcomes and big steps forward on the road to reaching our collective long-term vision.



How did we arrive at this plan?

APRIL - MAY 2023

- Project Initiation and Management

JUNE 2023 - AUGUST 2023

- Strategic Plan presentation to City Council at Annual Retreat
- Strategic Plan Website Launched
- Conducted Interviews and Focus Groups
- Community Forums help August 29 and August 31

OCTOBER 2023

- City Council Strategic Planning Retreat October 25
- Staff Strategic Planning Session October 26

NOVEMBER 2023-JANUARY 2024

- Developed Mission, Vision, and Core Values
- Developed Strategic Priorities, Objectives and Performance Measures

FEBRUARY 2024

- Presented Initial Strategic Plan to City Council
- Implementation Planning with City Staff

APRIL 2024

- Implementation Planning with City Staff
- Final Adoption of Strategic Plan

APRIL 2024 - MAY 2029

- Implement City of New Braunfels Strategic Plan



10640

Online interactions with Social Pinpoint



662

Survey responses



99

Ideas Wall comments



140

Interviews



4

Community forums



3

City Council Public Presentations

Putting the Plan Into Action

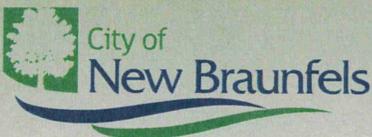
Now that the Strategic Plan is adopted, the implementation phase begins in earnest.

This involves translating the outlined strategies into actional steps, assigning responsibilities, and establishing timelines.

Regular monitoring and evaluation mechanisms will be put in place to assess progress and adjust as needed.

Feedback loops will also be established to help ensure continuous improvement and alignment with the City's overarching goals. Successful execution of the strategic plan will require adaptability, clear communication, and a commitment to achieving the defined objectives.

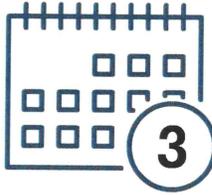
The Strategic Plan's goals and objectives will also be incorporated into the City's annual budget development process. You will see specific plan components used to guide funding decisions that drive the future of the City.



What's Next?

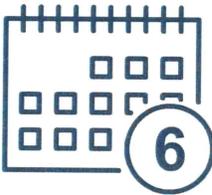
Keeping Track Of Progress

How are we doing? We'll let you know!



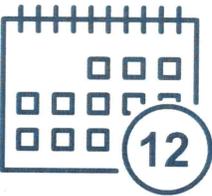
QUARTERLY

City leadership will track, record, and analyze progress made on performance measures.



TWICE A YEAR

The City staff will provide an updated to City Council for each Strategic Plan goal, including significant wins and challenges. As plan implementation unfolds, this reporting will also include status updates to performance measures and key performance indicators.



ANNUALLY

The City staff will prepare a year end update detailing progress on each Strategic Plan goal. The report will be shared annually with City Council.

Acknowledgements

Plan Development

The Strategic Plan is the result of the combined efforts of community members, elected officials, and employees. The City of New Braunfels would like to thank all those who participated in the months-long process, providing knowledge and insights throughout the various stages of the process.



City Council

Neal Linnartz, Mayor
Andrés Campos, District 1
Christopher Willis, District 2
Harry Bowers, District 3
Lawrence Spradley, District 4
Mary Ann Labowski, District 5
April Ryan, District 6



City Executive Leadership Team

Robert Camareno, City Manager
Jordan Matney, Deputy City Manager
Jared Werner, Assistant City Manager
Valeria Acevedo, City Attorney
Rose Zamora, Municipal Court Judge
Chad Donegan, Parks and Recreation Director
Garry Ford, Director of Transportation and Capital Improvements
Tony Gonzalez, Director of Information Technology
Jeff Jewell, Director of Economic and Community Development
Christopher Looney, Director of Planning and Development Services
Greg Malatek, Director of Public Works
Becca Mears, Director of Human Resources
Sandy Paulos, Director of Finance
Gretchen Pruett, Library Director
Jenna Vinson, Director of Communications and Community Engagement



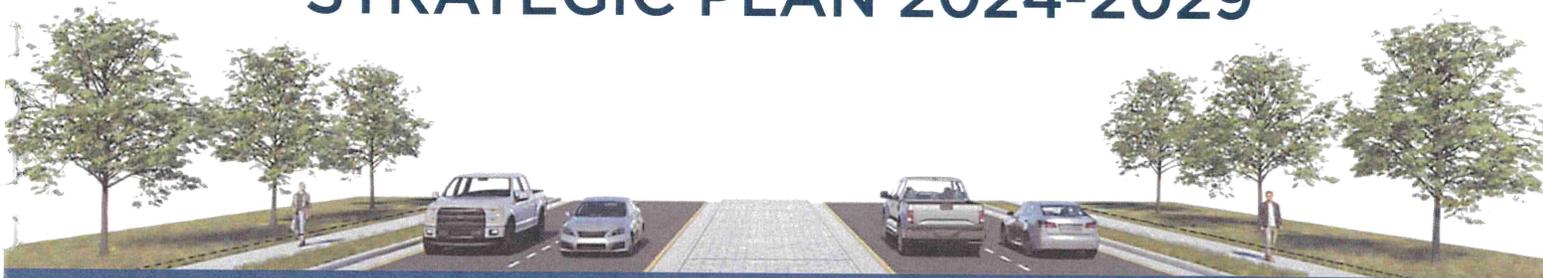
BerryDunn Consulting Team

Seth Hedstrom, Principal
Michelle Kennedy, Project Manager and Lead Facilitator
Karen Whichard, Facilitator
Maddison Powers Spencer, Research Analyst



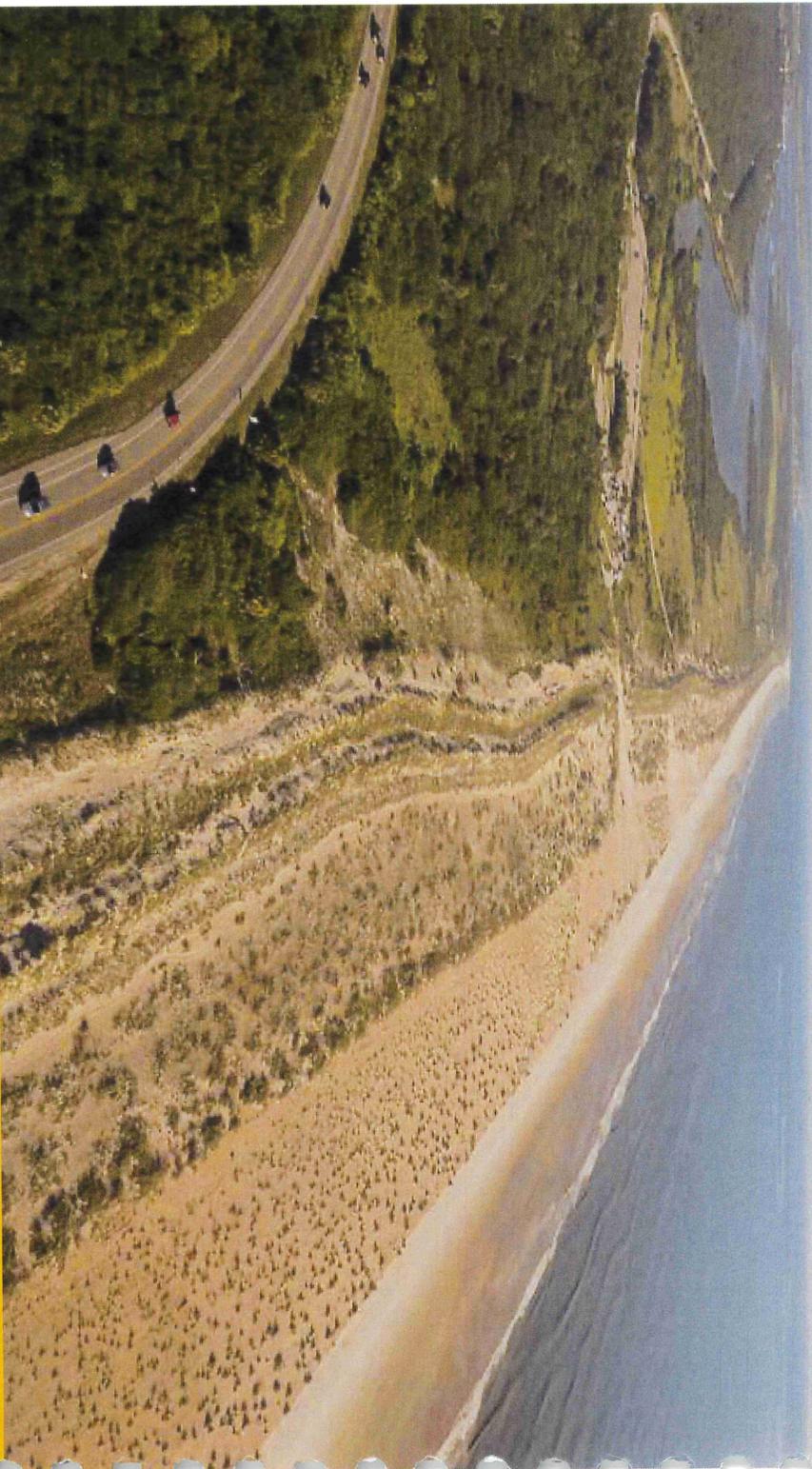
City of
New Braunfels

STRATEGIC PLAN 2024-2029





**STRATEGIC PLAN
2024-2029**



St. Johns County Board of County Commissioners

TABLE OF CONTENTS



The Purpose of Our Strategic Plan	3
Letter from County Administrator	4
How Did We Arrive at This Plan?	5
Mission, Vision and Values	7
Strategic Priorities	8
Community Trust	9
Community Well-Being	11
Economic Prosperity	14
Enhance Conservation	16
Infrastructure	18
Organizational Excellence	20
What's Next?	23



HOW DID WE ARRIVE AT THIS STRATEGIC PLAN?



November – December 2023

- Project Initiation and Management



January – April 2024

- Project Orientation with Board of County Commissioners and Leadership
- Strategic Plan and Community Website Launched (Social Pinpoint)
- Community Forums with Residents
 - Interviews and Focus Groups with County Stakeholders
 - Statistically Valid Community Survey Completed
- Development of Environmental Scan to inform the Strategic Plan



May – June 2024

- Strategic Planning Retreat with Board of County Commissioners
- Strategic Plan Development Workshops with Department Directors and Staff



July – August 2024

- Development of Mission, Vision, and Values
- Development of Strategic Priorities, Goals, Objectives, and Performance Measures with Department Directors and Staff



September 2024

- First Presentation of draft Strategic Plan to the Board of County Commissioners
- Implementation Planning with County Staff



December 2024

- Adoption of the Strategic Plan by the Board of County Commissioners



January 2025 - December 2029

- Implement St. Johns County Strategic Plan



HOW DID WE ARRIVE AT THIS STRATEGIC PLAN?



2,243

Online interactions with Social Pinpoint



750

Survey responses



665

Comments and responses on Social Pinpoint



325

Residents attended 6 community forums



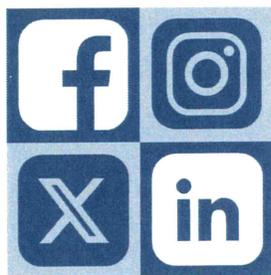
52

Interview and focus group participants



4

Board of County Commissioners engagements



57

Post generated 65,841 impressions, demonstrating significant visibility



4,568

Total engagements, including reactions, comments, shares, and clicks



11,128

Video views across the posts

MISSION VISION AND VALUES



Our Mission



We serve and invest in our community through innovative leadership, high-quality services, and preserving the County's history and natural beauty while enhancing economic vitality.

Our Vision



St. Johns County is a historic community with a thriving population and economy, offering world-class cultural and recreational opportunities and an exceptional quality of life.

Our Values



Dedication

We are persistent and determined in our unwavering dedication to serving our community and committed to delivering results that meet the diverse needs of our residents.

Openness

We believe in the power of clear and transparent communication to foster trust, collaboration, and understanding.

Adaptability

We embrace flexibility, innovation, and resilience in every aspect of our work.

Visionary

We foster a culture of curiosity and creativity to drive meaningful progress and deliver forward-thinking community solutions.

Fiscal Responsibility

We are prudent and accountable stewards of our financial and physical resources so that our community thrives.

Integrity

We make trustworthiness, reliability, and honesty the cornerstones of our actions, building and maintaining trust with our community through consistently delivering our promises and ethical behavior in every action.

Humility

We approach our work in partnership with our community, providing services in a compassionate and empathetic way so that all feel valued and respected.

STRATEGIC PRIORITIES



COMMUNITY TRUST



Enhance community trust through proactive communication to foster engagement and build an environment of public participation.

OBJECTIVES

Expand opportunities for community input and access to information to promote awareness and understanding of government operations and decision-making.

Outcomes

- Improved community trust
- Supported educated, engaged, and informed public who provides input and obtains information
- Developed public participation and citizen feedback platforms

Performance Measures

- Maintain/increase residents' overall trust in the County government (measured by annual community survey)
- Maintain/increase residents' satisfaction with County communication and engagement (measured by annual community survey)
- Maintain/increase residents' satisfaction with the County website (measured by annual community survey)
- Increase in community participation in communication channels and activities measured year-over-year

Build effective organizational communication to ensure consistent and accurate information is delivered to the community.

Outcomes

- Community received consistent and accurate information
- Internal department communication strategy is efficient and effective
- Developed inter-department and countywide collaboration platforms

Performance Measures

- Maintain/increase resident satisfaction with the quality and responsiveness of County services (measured by annual community survey)



COMMUNITY TRUST



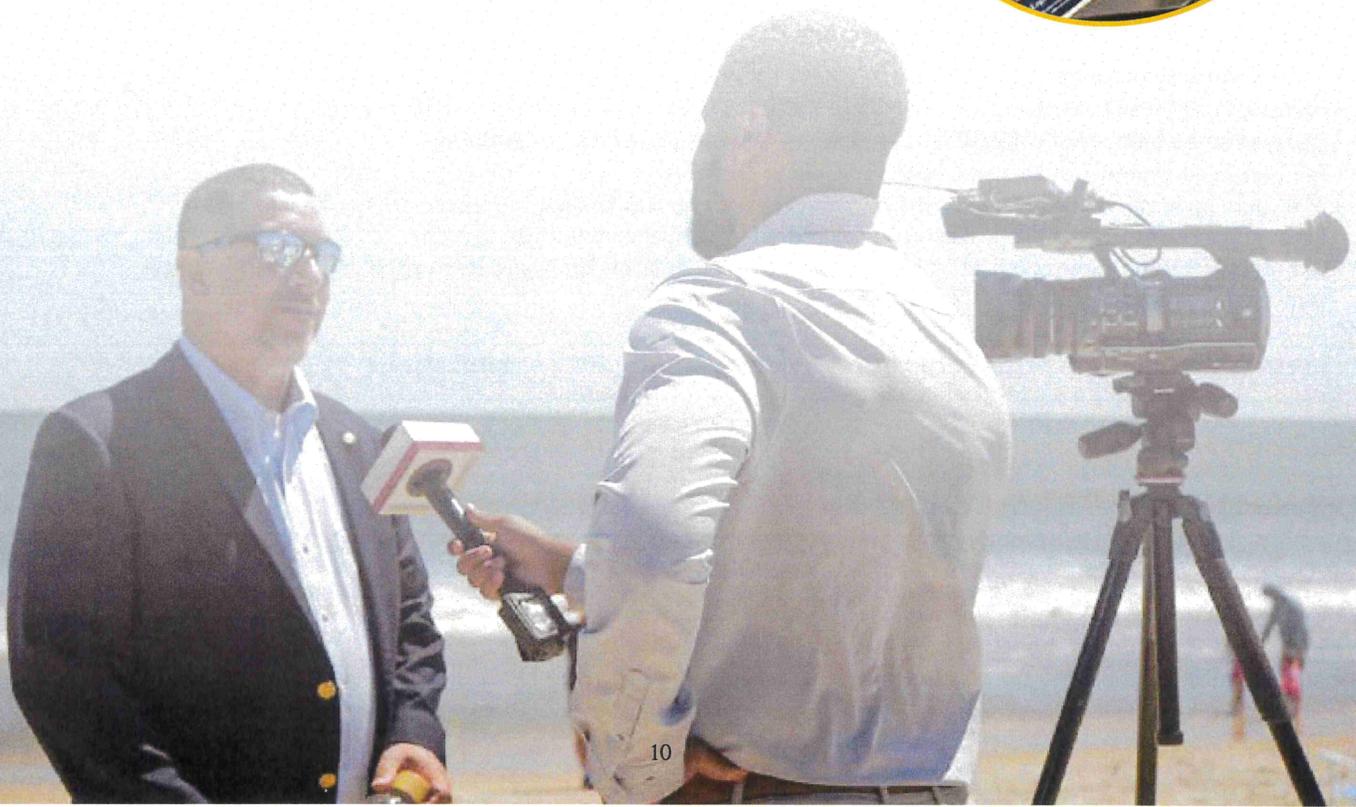
Expand and promote volunteer opportunities to enhance citizen participation in County programs and services.

Outcomes

- Enhanced citizen participation
- Expanded volunteer opportunities
- Increased public awareness of volunteer opportunities

Performance Measures

- Increase in volunteer rates for boards and committees
- Increase newsletter distribution as compared to industry averages annually
- Increase volunteer applications received for board or committee positions
- Increase the County's mobile app subscribers



COMMUNITY WELL-BEING



Expand access to safe public spaces, diverse recreational facilities, attainable housing, and innovative community activities to foster physical and mental well-being and connectivity within our community.

OBJECTIVES

Improve and expand recreational and cultural facilities to promote diverse connections across the community and foster social engagement for all interests and abilities.

Outcomes

- Improved existing leisure and cultural facilities for accessible social engagement
- Increased community utilization of amenities

Performance Measures

- Increase in the number of parks per 1,000 residents, per National Recreation and Parks Association
- Increase in the number of programs provided at parks and libraries
- Maintain/increase resources to adequately support Parks and Recreation and Library Services facilities and assets
- Complete an assessment of current facilities and assets requiring renovation or replacement and maintain inventory
- Increase in the number of library card applications
- Increase in circulation of print and electronic library materials

Engage with the arts and culture sector to preserve the community's identity through events, programming, and educational classes provided by the Library and Parks & Recreation Departments.

Outcomes

- Increased community participation in Park and Library programs
- Improved collaboration between the Library Services and Parks and Recreation Departments for program delivery
- Established new arts programming and education classes

Performance Measures

- Increase internal and external programs offered by Library Services and Parks and Recreation
- Increase in the number of community partner engagements to provide programming
- Increase in the number of art installations in County facilities
- Maintain/increase community satisfaction with events/programs hosted, sponsored or coordinated by Parks and Recreation and Library Services (measured by annual community survey)
- Maintain/increase resources to adequately support the demands on Parks and Recreation and Library Services facilities and assets

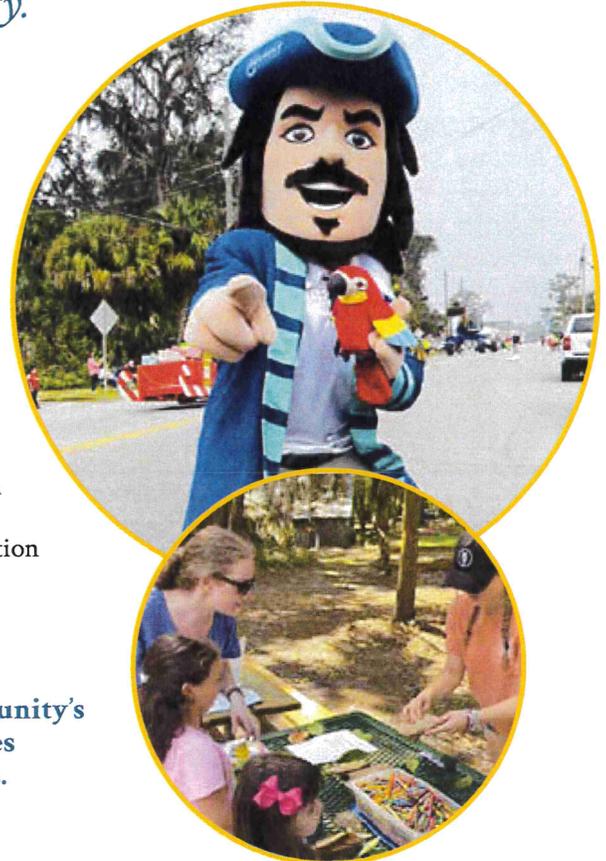
Leverage partnerships with nonprofits and other community organizations to enhance human and social service programs and initiatives.

Outcomes

- Improved resident awareness of available County services
- Enhanced resident self-sufficiency and stability
- Educated participants who comply with program requirements

Performance Measures

- Improve outcomes in County human services programming year-over-year
- Increase in the number and variety of social service resources available to the community each year
- Increase in the number of individuals positively impacted by partnership initiatives
- Maintain/improve participant satisfaction with program outcomes (measured through annual satisfaction and feedback surveys)



COMMUNITY WELL-BEING



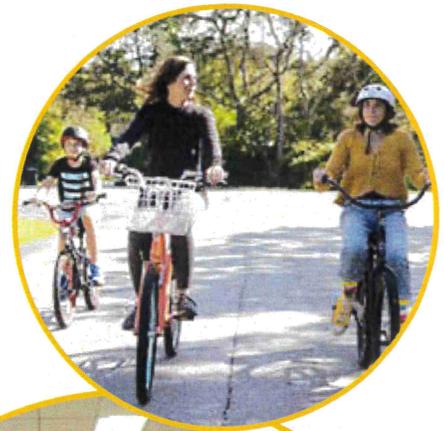
Encourage and support pet ownership through programs and partnerships to reduce the number of stray animals and owner surrenders.

Outcomes

- Reduction in stray, feral, and lost pet population

Performance Measures

- Reduction in the percentage of pets surrendered each quarter
- Increase in the number of pet outreach events
- Increase in the number of volunteers at the Pet Shelter and pet outreach events
- Increase in the number of low-cost and no-cost vaccines administered



Focus capital investments on transportation options to create a more livable, connected, and resilient community.

Outcomes

- Connected residents to the community by providing efficient transportation options and resources
- Expanded sidewalks, trails, and bike paths connecting communities

Performance Measures

- Complete Connectivity Plan for mobility
- Identification of pedestrian/bike trails gaps
- Increase in number of miles of sidewalk added annually
- Increase in number of bike lanes/trails added annually
- Maintain/increase community mobility through expanded culture and recreational facilities and amenities (measured by annual community survey)



In partnership with public safety agencies, maintain a low crime rate and further enhance the safety of residents and visitors in the community by supporting strong policies, funding, and initiatives.

Outcomes

- Increased community safety
- Maintained a strong foundation for crime prevention and community efforts through community education and engagement
- Engaged non-profit organizations for collaboration with law enforcement, fire rescue, code enforcement, and animal control to educate, conduct policy research, and explore new initiatives

Performance Measures

- Decrease/maintain crime rate year-over-year
- Increase in community education engagement events about local code enforcement ordinances
- Increase in percentage of non-profit participation in education programs aimed at improving safety and reducing crime
- Increase in the number of law enforcement, fire rescue, code enforcement, and animal control-sponsored community events
- Reduce/improve response and “control” times of fire incident calls
- Reduce/improve response and “transport” times of medical aid call
- Maintain/increase community satisfaction in law enforcement, fire, and emergency medical response times, interactions, and encounters (measured by annual community survey)
- Maintain/increase community satisfaction with the County’s emergency preparedness (measured by annual community survey)

ORGANIZATIONAL EXCELLENCE



Create an environment that fosters collaboration and teamwork, empowering County staff to deliver exceptional service.

OBJECTIVES

Create a work environment that keeps employees informed and engaged and allows them to suggest improvements in operations.

Outcomes

- Engaged staff
- Implementation of best practices across functions

Performance Measures

- Increase employee engagement and satisfaction with internal communication (measured by an annual engagement survey)
- Increase employee suggestion initiatives
- Increase the number of business processes improved annually



Leverage modern technology and system capabilities to improve operations.

Outcomes

- Reduced redundancies across functions
- Leveraged technology to streamline operations

Performance Measures

- Implementation of an Enterprise Resource Planning Solution
- Create technology governance and management framework
- Develop an information technology modernization plan
- Increase employee satisfaction with technology tools and services as measured by an annual employee engagement survey



Secure critical infrastructure for public safety, transportation, and utility programs by investing in appropriate human and technology resources.

Outcomes

- Implemented advanced technology to meet future critical infrastructure needs
- Completed system upgrades to achieve optimal functionality

Performance Measures

- Maintain/increase investment in technology upgrades annually
- Maintain/increase resources annually to adequately support, secure, and improve technology

ORGANIZATIONAL EXCELLENCE



Improve employee retention at the County by implementing a comprehensive onboarding and professional development program to sustain an engaged and committed workforce.

Outcomes

- Improved continuity of operations following staff turnover
- A well-trained workforce prepared for professional advancement

Performance Measures

- Develop a comprehensive employee onboarding program for the organization and within each department
- Improve organizational employee recognition program to acknowledge and celebrate employee successes annually
- Increase the number of training hours per employee annually
- Improve and improve utilization of employee tuition reimbursement assistance
- Improve system for evaluating employee performance and supporting professional growth
- Maintain/increase employee engagement (measured through an employee engagement survey annually)
- Maintain/increase employee retention rate quarterly



Streamline the hiring process, build a strong talent pipeline, and improve the candidate experience to attract top talent and become a sought-after employer.

Outcomes

- Reduced productivity loss from vacant positions
- Highly qualified and experienced workforce
- Positive experience for new hires

Performance Measures

- Maintain/reduce staffing vacancy rates quarterly
- Increase in the number of qualified applicants per job posting
- Increase/maintain new hire satisfaction experience (measured by new hire survey)



WHAT'S NEXT?



Putting the Plan into Action

We know our community has high standards and aspirations. We enjoy a high quality of life in St. Johns County and want it to remain an excellent place to be. The plan's five-year timeline allows for thoughtful sequencing of priorities and objectives that will make our continued high quality of life possible.

With the strategic plan in place, an implementation plan will translate the priorities, goals, and objectives into action steps with assigned responsibilities and established timelines. This will allow County departments to work together to achieve our desired future. The Office of Performance and Transparency will provide regular monitoring, and evaluation systems will be put in place to help ensure continuous improvement and ongoing alignment with the County's overarching goals. Implementing the County's new Enterprise Resource Planning (ERP) system will support this by enhancing efficiency, transparency, and decision-making.

We are committed to focusing resources on the priorities that best serve the needs of the community and captured in this plan. We will align the strategic plan with the County's annual budget process so we can ensure that resources are utilized efficiently and directed toward the most important priorities. As needs or opportunities shift during the plan's life, the County expects to address any needed changes as part of the annual budget process.

Keeping Track of Progress

The County will utilize strategic planning software to plan, monitor, and report progress toward goals and objectives, as well as report on performance measures. Tracking and monitoring holds us accountable.

The County will provide the community with an annual report and year-end presentation to the Board of Commissioners. Dashboards and other data visualization tools will be shared with community members so they can understand what we are working on and the benefits that will result for our residents, businesses, visitors, and the community overall.

Monthly –

County staff will discuss and evaluate progress on strategic goals and objectives.

Quarterly –

County leadership will provide the County Administrator with progress updates for each strategic plan priority.

Twice a Year –

The County Administrator's Office will prepare an update to the Board for each strategic priority, including progress updates, successes and wins, and challenges.

Annually –

The County Administrator's Office will prepare a year-end update detailing progress on each strategic priority, goal, and objective. The report will be presented to the Board of County Commissioners and shared with the community on the County's website www.sjcf.us





“BerryDunn” is the brand name under which Berry, Dunn, McNeil & Parker, LLC and BDMP Assurance, LLP, independently owned entities, provide professional services in an alternative practice structure in accordance with the AICPA Code of Professional Conduct. BDMP Assurance, LLP is a licensed CPA firm that provides attest services, and Berry, Dunn, McNeil & Parker, LLC, and its subsidiary entities provide tax, advisory, and consulting services.

The entities falling under the BerryDunn brand are independently owned and neither entity is liable for the services provided by the other entity. Our use of the terms “our firm” and “we” and “us” and terms of similar import denote the alternative practice structure of Berry, Dunn, McNeil & Parker, LLC and BDMP Assurance, LLP.

We will be utilizing generative AI programs where appropriate and permissible under client contracts and relevant laws. These AI tools are designed to support our team in various aspects of our work, including data analysis and project management. The integration of AI enables us to provide more accurate insights and streamline our processes, ultimately benefiting our clients through enhanced service delivery.

This proposal is the work of Berry, Dunn, McNeil & Parker, LLC and is in all respects subject to negotiation, agreement, and signing of specific contracts.

©2026 BerryDunn | All rights reserved.



