

PROPOSAL

TECHNICAL PROPOSAL TO THE:

City of Palm Desert

**REQUEST FOR PROPOSALS NO. 2024-RFP-157
FOR:**

Strategic Plan
Development

SUBMITTED BY:

Berry, Dunn, McNeil & Parker, LLC
4722 North 24th Street, Phoenix, AZ 85016

Seth Hedstrom, Project Principal
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Facilitator**
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Proposal Submitted On:
March 3, 2025, before 2 p.m. PST

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A. Cover Letter

March 3, 2025

City of Palm Desert
Attn: Cristal Ortega, Management Analyst II
73510 Fred Waring Drive
Palm Desert, CA 92260

Dear Cristal Ortega and Members of the Selection Committee:

On behalf of BerryDunn, I am pleased to submit this proposal in response to the City of Palm Desert's (the City's) request for proposals (RFP) for Strategic Plan Development. 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 90 days from the submission deadline of March 3, 2025.

As the City will learn more about on the following pages, our firm is a nationally recognized professional services firm, headquartered in Portland, Maine, with 10 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 51-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 City and in the Palm Desert community.**

With the City's goals and objectives in mind, we are certain that we are well-positioned to partner with the organization on this engagement. As described below, we have several attributes that will help ensure the City receives the strongest possible Strategic Plan.



Demonstrated commitment to serving clients in the State of California (the State). The City will benefit from our familiarity with the State's public-sector landscape and experience successfully completing projects of similar size and complexity in the region. Our public-sector experience in the State includes work with over five dozen municipalities, counties, colleges and universities, and quasi-governmental agencies. Notably, we are currently working on/have completed strategic plans with the Cities of Redlands, Capitola, Indio, Menifee, and Santa Monica, and Santa Clara County. Using our expansive knowledge and lessons learned from these projects, we will provide the City with optimal efficiency, superior services, and productivity on this engagement.



Significant strategic planning experience. 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. Notably, our proposed engagement manager and facilitator, Michelle Kennedy, has conducted more than 70 similar plans. Our proposed project manager and facilitator, Maddison Powers Spencer, has completed more than 35. We are skilled at facilitation, communication, and research and consider diverse inputs in creating a shared vision necessary for making continued progress both in the short- and long-term. This broad exposure to the strategic planning process and in-depth expertise means that we understand what it takes to bring success to a project like the City's. It is our goal to have the City's resulting plan reflect who it is now, where it wants to go, and how it will get there, and we are confident that we are the right partner to make that happen.



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

Institute of Cultural Affairs' (ICA) Technology of Participation® (ToP®) facilitation methodology and designed to meet the needs of stakeholders, including elected and appointed officials, managers, frontline staff, and the public. All of the proposed facilitators—Michelle, Maddison, Jen, and Karen—are certified in this consensus-based methodology. 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. We have worked with a variety of councils to provide facilitation, including agencies with new council members.



Creative and adaptable community engagement approaches. Robust, inclusive engagement with staff, the Mayor, City Council members, representative board and committee members, regional partners, community groups, community-based organizations, non-profits, and local businesses is a core focus of each of our strategic and community planning initiatives. We have a well-refined, customizable toolkit of engagement strategies through which we generate excitement, encourage participation, and help ensure equity. Our team supports all participants through the process, including council, executive staff, and the community. We offer fun engagement strategies such as surveys, town halls, interviews, round tables, meetings-in-a-box, attendance at community events, open houses, pop-ups around the City, and virtual and in-person community forums. The City can rely on our team to develop a custom-fit approach that matches outreach to the needs of the organization and its partners.



In-depth understanding of the local government landscape and how to best support clients' organizational development efforts. All our project team members exclusively serve local government clients and the majority worked in local government organizations prior to joining BerryDunn. In fact, our proposed project manager and facilitator, Maddison, is the former assistant to the City Manager of Covington, Georgia. She has also worked on similar strategic planning efforts for multiple agencies in California. Our proposed engagement manager and facilitator, Michelle, has three decades of organizational management consulting experience and understands how to create strategic plans with implementable recommendations. Jen Ferguson and Karen Whichard, our proposed facilitators, each served over 20 years in a local government role. Having served dozens of local governments across the country, our team has a deep understanding of local government organizations, including their opportunities, challenges, priorities constraints, and commitment to serving the varied needs of community members. Collectively, we are well-qualified to support the holistic needs of the City, as it seeks to improve, transform, and innovate.



An understanding of technological tools to guide plan development and implementation. Advances in technology have shaped how we develop strategic plans. We utilize digital engagement tools, such as Social Pinpoint and Mentimeter, to expand our ability to interact with interested parties. Through online surveys and other tools, we make engagement accessible to anyone who wants to participate rather than only reaching those who can attend in-person sessions. Mentimeter adds an interactive component to in-person events. Attendees can easily interact with our consultant team in a fun, engaging way. We use technological tools to make the plan compelling, including geographic information systems (GIS) capability, Esri data, and other interactive engagement strategies. We also assist with dashboarding to help our clients focus on outcome-driven recommendations and easily measure progress toward achieving their goals. We worked alongside two of our clients, St. Johns County, Florida, and the City of Colorado Springs, Colorado, to support this development.

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 BerryDunn's Local Government Practice Group, Seth can attest to the accuracy of our materials, and he is legally authorized to bind, negotiate, make presentations on behalf of, and commit our firm and our resources. Per the City's request, we have also included the signature of BerryDunn's Chief Operating Officer, Chad Snow, who is also legally authorized to bind and sign our agreement with the City. **If you have any questions regarding our proposal or updates on the evaluation process, please consider Seth your primary point of contact and feel free to contact him directly.**

Sincerely,



Seth Hedstrom, PMP®, LSSGB, Principal
Berry, Dunn, McNeil & Parker, LLC
207.541.2212 | shedstrom@berrydunn.com



Chad Snow, PMP®, Principal, Chief Operating Officer
Berry, Dunn, McNeil & Parker, LLC
207.541.2294 | csnow@berrydunn.com

B. Experience and Technical Competence

1. Background

BerryDunn was formed in 1974 and has 73 principals, 37 owners, and 10 office locations. We have experienced sustained growth throughout our **51-year history**.

We employ more than 935 staff members—including more than 335 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 tenant 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.



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 of 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.

Relevant Experience

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. We summarize our clients in the State on the following page, and **for those whom we provided organizational planning services—whether at the enterprise- or departmental level—we bold them in blue below for easier review.**



Embracing Diversity, Equity, and Inclusion (DEI)

BerryDunn has advanced community, diversity, and empathy in a workplace where people are respected, and heard. We carry these principles and values into our work with clients.

We help ensure that traditionally marginalized communities are supported, validated, and engaged as a standard part of our project approach. We use tools, practices, and methodologies to help ensure that our initiatives have widespread reach and work for all people, regardless of race, ethnicity, age, sexual orientation, gender identity or expression, religion, or disability.

We also consider the distinct cultural nuances for each community in our approach to this work to help ensure that we meet our clients where they are in the DEI space.

- 
- Bay Area Air Quality Management District
 - California State University, Bakersfield
 - California State University, Chico
 - California State University, Long Beach
 - California State University, Los Angeles
 - California State University, San Marcos
 - California Western School of Law
 - City of Alameda
 - City of Belmont
 - City of Camarillo
 - **City of Capitola**
 - City of Corona
 - **City of Coronado**
 - City of Fountain Valley
 - City of Irvine
 - **City of Indio**
 - City of La Mesa
 - City of Lake Elsinore
 - City of Livermore
 - City of Long Beach
 - **City of Menifee**
 - City of Milpitas
 - City of Modesto
 - **City of Monterey Park**
 - **City of Novato**
 - City of Oxnard
 - **City of Palmdale**
 - City of Pasadena
 - City of Redding
 - **City of Redlands**
 - City of Redwood City
 - City of Richmond
 - City of San José
 - City of San Leandro
 - City of Santa Cruz
 - **City of Santa Maria**
 - **City of Santa Monica**
 - City of Santee
 - City of Simi Valley
 - City of Sunnyvale
 - City of Villa Park
 - Coachella Valley Association of Governments
 - Coachella Valley Water District
 - Cosumnes Community Services District
 - Covered California
 - Imperial County
 - **Jurupa Area Recreation and Park District**
 - Kern County
 - **Lake Tahoe Community College**
 - Mt. San Antonio College
 - Oceanside Public Library
 - Sacramento Municipal Utility District
 - San Luis Obispo County
 - Santa Clara County
 - Santa Cruz County
 - Santa Monica College
 - Sonoma County
 - Sonoma Resource Conservation District
 - **South Pasadena Public Library**
 - **Southern California Library Cooperative**
 - Stanford University
 - **Stanislaus County**

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

BerryDunn has been offering strategic planning services for over 30 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 and on the following page, we provide a representative list of clients for whom our project team members have performed similar services in recent years. **Our California-based clients are highlighted in blue.**

- Bloomfield Township, Michigan
- City of Apopka, Florida
- City of Beaverton, Oregon
- City of Blue Springs, Missouri
- City of St. Charles, Illinois
- City of Washougal, Washington
- City of Waukesha, Wisconsin
- City of Wausau, Wisconsin

- **City of Capitola, California**
- City of Colorado Springs, Colorado
- City of Cooper City, Florida
- City of Creswell, Oregon
- City of Edgewater, Colorado
- City of Ennis, Texas
- City of Foley, Alabama
- City of Gresham, Oregon
- City of Groveland, Florida
- City of Homestead, Florida
- **City of Indio, California**
- City of Janesville, Wisconsin
- City of Lauderhill, Florida
- City of Margate, Florida
- **City of Menifee, California**
- City of Milton, Georgia
- City of New Braunfels, Texas
- City of Peoria, Illinois
- City of Port Arthur, Texas
- **City of Redlands, California**
- **City of Santa Monica, California**
- City of Westminster, Colorado
- DuPage County, Illinois
- Erie Housing Authority, Pennsylvania
- Jefferson County, Washington
- Lake County, Illinois
- Lancaster County, Nebraska
- Lane County, Oregon
- Marquette County, Michigan
- Milwaukee County, Wisconsin
- Newton County, Georgia
- Onslow County, North Carolina
- Orange County, North Carolina
- **Santa Clara County, California**
- St. Johns County, Florida
- Tompkins County, New York
- Town of Chelmsford, Massachusetts
- Town of Holliston, Massachusetts
- Vancouver Housing Authority, Washington
- Washington County, Minnesota
- Weld County, Colorado

2. 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 several recent projects for the City's consideration. These clients can speak well to the quality and satisfaction we deliver on comparable engagements.

City of Colorado Springs, Colorado (02/2024 – Present)

Courtney Brown, Strategic Plan Manager

719.385.2489 | courtney.brown@coloradosprings.gov

With strong backing from City leadership, the City of Colorado Springs kicked off its 2024 – 2028 Strategic Plan internally. This first internal phase centered around community engagement and included a listening tour, focus groups, a community survey, and a public-facing web page. Through this engagement, the City developed a “Strategic Doing Framework” that synthesized what the community was asking the City to prioritize in the near term.

The City then contracted BerryDunn to assist with the second phase of strategic plan development. This included further community engagement and visioning; developing a mission, goals, and priorities—as well as department-level priorities, activities, and measures; and producing a polished Strategic Plan. Our team has developed and finalized the 2024 – 2028 Strategic Plan and assisted with change management implementation. We have created departmental operation work plans, dashboards for data management, performance measures, and training plans to move the organization forward in implementation management.

The Strategic Plan focuses on five key priorities—public safety, infrastructure, housing solutions, economic vitality, and community activation—and provides guidance as the City works to fulfill its mission to provide exceptional service, respond to evolving needs, and plan for the future to promote a flourishing community.

City of Menifee, California (08/2022 – 03/2023)

Rebekah Kramer, Deputy City Manager
951.723.3765 | rkramer@cityofmenifee.us

BerryDunn assisted the City of Menifee in developing a long-term strategic visioning effort that established a set of priorities and objectives for its next five years, informed the development of departmental work plans, and provided implementation guidance. Our approach focuses on engaging and analyzing the City's internal organization and larger, external community through interviews, research, and community forums. Through these efforts and in partnership with key stakeholders, we will develop a strategic plan and performance monitoring guidance. The City is currently implementing their plan and providing periodic updates on the City website to promote trust and transparency in the planning process.

City of Capitola, California (12/2023 – Present)

Jamie Goldstein, City Manager
831.475.7300 | jgoldstein@ci.capitola.ca.us

BerryDunn is in the final stages of developing a five-year strategic plan for the City of Capitola. Over the past year, we have 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. We have presented the draft to City Council and are incorporating final feedback from a community and employee review process to finalize the plan.

C. Firm Staffing and Key Personnel

1. Staffing

BerryDunn employs more than 935 staff across 10 offices. Our Consulting Services Team includes more than 335 staff, of which approximately 80 are dedicated local government consultants. Our people are what differentiates us from our competitors. We hear this feedback repeatedly from our clients, whose repeated selection of our services is a testament to their satisfaction with our firm and team members. BerryDunn carefully considers the tasks, timelines, and objectives for proposed projects in order to select team members who are best qualified to provide services. Our staffing strategy offers the City highly qualified experts with significant depth of experience leading strategic planning activities of similar size and complexity. The City will benefit from BerryDunn's deep bench strength, with 335 subject matter experts (SMEs) and auditors to support your project needs. When we receive a request for services, we identify team members based on several factors, including but not limited to:

- The nature of the work to be performed
- The level of commitment requested (e.g., full-time, part-time)
- The team member's other commitments
- Specific certifications and/or areas of expertise
- The timing and duration of the project

For the City's requested work effort, BerryDunn has carefully assembled a team of six experienced consultants, along with a pool of SMEs to be leveraged as needed. Additional information has been provided for each proposed team member in the following section.

2. Key Personnel

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

Berry, Dunn, McNeil & Parker, LLC

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. Seth has served as principal on recent strategic planning projects with the Cities of Capitola and Menifee, California, and Santa Clara County, California. He has supported BerryDunn's work with more than 10 California-based cities and counties.

As the **project principal**, Seth will:

- Maintain overall responsibility for the services provided to the City
- Review and approve all deliverables in accordance with our quality assurance processes
- Help ensure the commitment of our firm and appropriate resource allocation



Michelle Kennedy, Prosci® CCP, ODCC | Engagement Manager and Facilitator

Berry, Dunn, McNeil & Parker, LLC

Michelle is a 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. She has led our strategic planning efforts for California communities including the Cities of Capitola, Menifee, and Redlands, and the Santa Clara County Consumer and Environmental Protection Agency (CEPA) in California.

As the **engagement manager and facilitator**, Michelle will:

- Build and maintain a productive relationship with the City
- Engage and support the project team as needed
- Participate in meetings with project leadership
- Advise on facilitation strategy and strategic plan development
- Provide oversight of our project team and project progress
- Provide subject matter expertise as needed



Maddison Powers Spencer, MPA | Project Manager and Facilitator

Berry, Dunn, McNeil & Parker, LLC

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 ICA 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 over 35 local government strategic plans. She has assisted with the development strategic plans including for the Cities of Capitola, Menifee, and Indio, and the Santa Clara County CEPA in California.

As the **project manager and facilitator**, Maddison will:

- Build and maintain a productive relationship with the City
- Design the facilitation approach to the strategic planning process
- Serve as the City's primary point of contact
- Facilitate the Strategic Planning Sessions and interviews
- Lead our work and perform day-to-day project management and staff oversight
- Present findings and the Final City of Palm Desert Strategic Plan
- Develop and maintain the Project Work Plan and

Schedule

- Lead the analysis and development of project deliverables
- Lead implementation planning efforts
- Provide subject matter expertise



Jen Ferguson, MPA | Facilitator
Berry, Dunn, McNeil & Parker, LLC

Jen is a senior consultant in our Local Government Practice Group. She has over 25 years of public-sector experience and significant expertise in strategic and financial planning. Jen has led, planned, and coordinated fiscal affairs for cities across Washington and Minnesota, holding influential leadership positions such as city administrator, director of finance, and executive director for an economic development authority. Supplementing her background in public-sector administration, Jen is well versed in, organizational development, performance management, operations and process improvement, economic and business development, enterprise resource planning implementations, and is certified in the ICA ToP® facilitation methodology.



Karen Whichard, MPA, Prosci® CCP | Facilitator
Berry, Dunn, McNeil & Parker, LLC

Karen is a senior consultant in our Local Government Practice Group and 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, 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. Karen's background includes serving as an Assistant County Manager, an Assistant Town Manager and as a member of the City of Charlotte, North Carolina Strategy & Budget Department. In Charlotte, 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 Davidson, North Carolina, she managed the Town of Davidson'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 of Davidson's first AAA bond rating. At BerryDunn, Karen has led organizational assessments and strategic planning efforts for clients throughout the United States.

As **facilitators**, Jen and Karen will:

- Work with our proposed project manager to design the facilitation approach to the strategic planning process
- Facilitate interviews, Community engagement activities including Visioning Forums, and Strategic Planning Sessions
- Participate in meetings with leadership and the community
- Contribute to deliverable development



Bailey Dickinson, MPA | Research Analyst
Berry, Dunn, McNeil & Parker, LLC

Bailey is a consultant in our Local Government Practice Group. His extensive background in the public sector has equipped him with a deep understanding of strategic planning within local government organizations. Serving as special projects coordinator for the City of Covington, Georgia, he led cross-departmental strategic initiatives and managed award-winning community

engagement projects. Bailey's project management, research, and analysis experience contribute to his skill at advancing strategic planning efforts in local government environments.

As the **research analyst**, Bailey will:

- Document engagement and strategic planning outcomes
- Help assess the City's current environment
- Analyze existing data and documentation
- Research best practices and industry standards

Additional Resources

As mentioned, the SMEs introduced below are only representative of our broader pool of more than 335 consulting resources. This pool is composed of highly specialized and skilled public-sector consulting professionals whose expertise can be leveraged and support can be drawn upon as needed during the City's strategic planning project.



Oliver Amaya, PMP® | SME and Bilingual Facilitator
Berry, Dunn, McNeil & Parker, LLC

Oliver Amaya is a consultant in our Local Government Practice Group. Before joining our team, he worked with the City of Corpus Christi, Texas Parks and Recreation Department as a special projects manager, where he helped the department execute initiatives based in community development, operational improvement, and increased connectivity. Oliver will assist with community engagement and compilation of findings. Oliver's experience serving in the U.S. Army also honed his ability to balance complex projects, work in complex environments, solve difficult challenges, and make effective decisions. His fluency in Spanish and Portuguese, in addition to English, enables him to reach diverse groups and listen to their input.



Laura Perez, MPA, Prosci® CCP | SME and Bilingual Facilitator
Berry, Dunn, McNeil & Parker, LLC

Laura is a consultant in BerryDunn's State Government Practice Group with strong leadership, project management, and organizational skills. She brings to this engagement experience liaising between stakeholders, organization leadership, and employee teams to achieve successful project outcomes. In her work, she has demonstrated success in gathering in-depth data and then organizing visual management metrics accessible to executive leaders to show progress on division goals and objectives. Her fluency in Spanish, in addition to English, enables her to reach diverse groups and listen to their input.



Michele Weinzetl, Ed. D., Prosci® CCP | Public Safety SME
Berry, Dunn, McNeil & Parker, LLC

Michele is a senior manager in our Local Government Practice Group. She has over 27 years of experience in the public sector. Her background includes more than 17 years as a chief of police for three different Minnesota police departments and several years serving as a subject matter expert, consultant, and adjunct faculty member for the International Association of Chiefs of Police (IACP) Leading by Legacy program. She has extensive experience instructing hundreds of police officers and police executives in the areas of staff supervision, leadership development, organizational management, and policing skills.



Andrea Brinkley, MPA, PMP® | Public Works SME

Andrea is a senior consultant in BerryDunn's Local Government Practice Group. She has 24 years of municipal government experience with prior public-sector titles ranging from capital improvement program director to assistant director of capital projects and assistant director of public works. As such, she has extensive experience in operational and capital improvement budgets, training, project management, analysis of service delivery, operational assessment, engagement with communities. She has worked with utilities, public works, and finance department teams to formulate project-related costs, conduct forecasting, and assist with programming and planning for debt issuances and new source funding. Both in the public sector and as a consultant, her leadership approach is collaborative and participatory.



Khara Dodds, MCRP, AICP | Community Development SME

Khara is a manager in BerryDunn's Local Government Practice Group. She is an American Institute of Certified Planners (AICP)-certified planner with more than 13 years of leadership experience and 20 years of planning and community engagement experience. She believes in the potential of community development to empower communities and positively impact quality of life. Khara leverages her experience in city and regional planning to assist clients as they assess existing policies and processes, collect and evaluate stakeholder input, and identify and implement recommendations for improvement. Khara has a demonstrated commitment to leading DEI efforts. She is a member of BerryDunn's CEO Council on Diversity, Equity, Inclusion, Belonging, and Access (DEIBA)'s systemic barriers subcommittee and is certified in Equitable Community Change through eCornell University. She also supports DEI efforts and training through the American Planning Association (APA). In the public sector, she led multiple community equity projects, recommended the declaration of racism as a public health crisis, led affordable housing initiatives, worked with underserved neighborhoods on improvement and revitalization, and secured economic development incentives for large development projects.



James Mickle, CPSI, CPRP | Community Services SME

James is a manager in our Local Government Practice Group and a Certified Park and Recreation Professional (CPRP). He is particularly skilled and experienced in municipal and nonprofit parks and recreation operations and DEI strategy development. James has over 20 years of experience in recreation operations, programming, and administration, volunteer board leadership, community, and employee engagement and Commission for Accreditation of Park and Recreation Agencies (CAPRA) accreditation and reaccreditation. Throughout his career he has concentrated on facility management, youth and teen civic engagement, facility management and active older adults comprehensive planning. He is a collaborative leader with dedication to partnering with coworkers to promote an engaged and empowering work culture.



Jesse Myott, MA | Finance SME

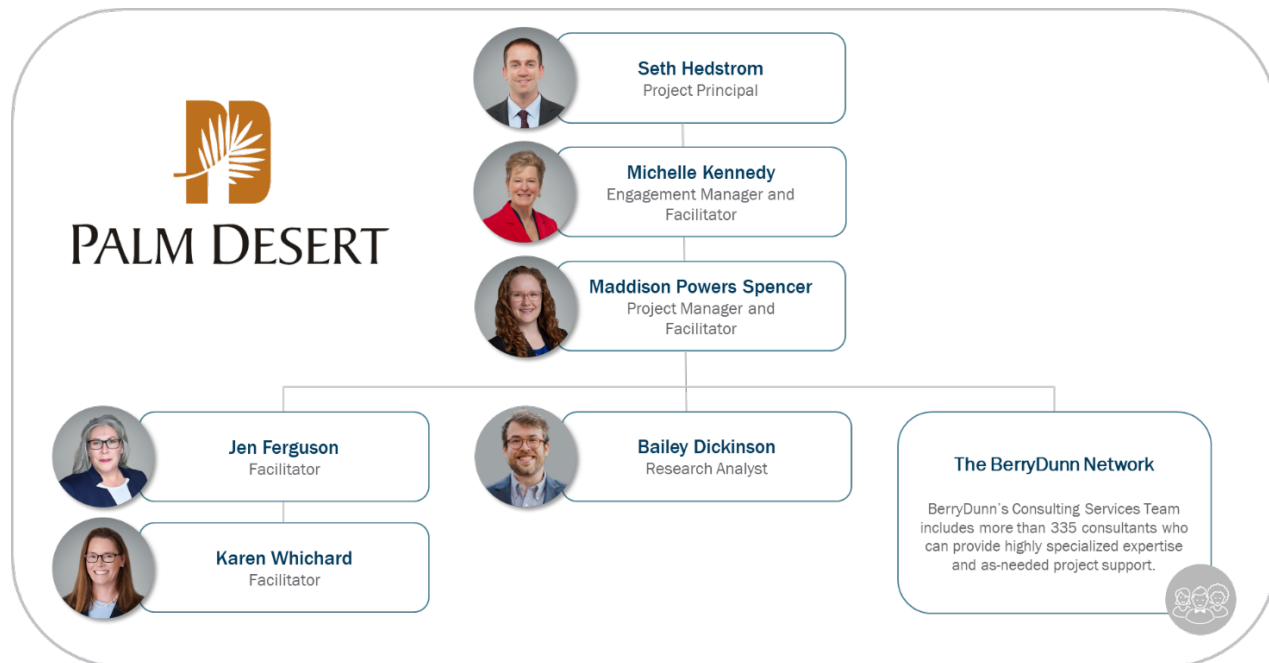
Jesse is a manager in our Local Government Practice Group. He has nearly a decade of public-sector experience, focusing on supporting municipalities with operating and capital improvement budget development and management; special fund accounting, revenue and expenditure forecasting; customer valuation; and cost of revenue analyses for municipal programs and services. Jesse has led multiple cost of service and cost allocation projects for local governments from California to Massachusetts.

3. Team Organization

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.

Figure 1: Project Team Organizational Structure



4. Subcontractors

We do not intend to subcontract any portion of the City's desired scope of work.

D. Proposed Method to Accomplish the Work

1. Understanding the City's Needs

Nestled in central Coachella Valley between the Cities of Palm Springs and Indio, the City of Palm Desert is home to approximately 50,000 full-time and 32,000 seasonal residents. The City takes pride in its unique desert scenery, sense of community, small-town vibes, exceptional educational opportunities, safety, and a plethora of retail stores. According to the City's 20-year strategic plan developed in 2013, the City's vision focuses on improving quality of life and offering residents "a wide array of recreational, educational, shopping, housing, and entertainment opportunities." The City's Strategic Plan centered around nine overarching themes, including Arts & Culture; Economic Development; Education; Energy & Sustainability; Land Use, Housing, & Open Space; Parks & Recreation; Public Safety & Emergency Services; Tourism & Marketing; and Transportation. This plan will build on those goals and celebrate successes in achieving them to this point. The revitalized strategic plan will integrate a particular focus on housing, economic development, climate resilience, and transportation. Our team will collaborate with the Mayor, the City Council, and the Palm Desert community to gain a thorough understanding of strengths and opportunities and to develop strategies that guide the City in its desired direction. This is a plan refresh, focusing on the continued success of the current strategic plan and bringing in new ideas from all stakeholders.

2. 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:

- City Council members
- The Executive Management Team
- All staff
- Residents
- Business owners
- Community groups
- Regional 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. A strategic plan is a living document that remains applicable, helps to navigate in times of organizational changes, and defines the organization's reason for being. It establishes a clear and compelling vision; sets measurable objectives and lays out the desired impact on and value added to entire communities—residents, business, employees, and other stakeholders; and helps set a direction and focus and assists 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, setbacks, and unanticipated events occur. It also helps ensure decisions, policies, plans, programs, and processes are designed through the lenses of stewardship of resources, equity, and collective impact.

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



Encouraging Crossing Boundaries and Strengthening Interdependencies

Strategies are themes for action, and successful strategies will often cross organizational and community boundaries and appeal to several environmental factors. We will help stakeholders recognize these interrelationships and critical interdependencies, identifying how they align with overall strategic goals.

Applying Effective Tools

Another key to success is aligning financial resources of the organization with strategic priorities. 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 can customize this tool for use with the City if the group is having difficulty achieving consensus.

Developing Clear and Compelling Plans That Articulate a Business Case

We will write strategic goals, initiatives, and actions in a common language to evoke a clear picture of success to serve as a useful tool for the City's decision-making. Our project team has facilitated clear, compelling strategic plans for 70 public-sector entities and system-level plans involving multiple levels of government, jurisdictions, and agencies. Our clients use these plans to drive budget decisions, execute strategies, and publish the results to communicate with stakeholders and the public.

Focusing on DEI

BerryDunn's approach focuses on and reflects our firm's commitment to DEI. We recognize how important it is that we assemble a project team that understands what the City needs to do to conduct a sound strategic planning process. We will work with the City—as well as DEI resources—to help ensure its work effort is conducted through an equity lens and effectively reaches traditionally marginalized communities.

With City serving as a backbone organization, we will engage current partners to facilitate an authentic, inclusive, and accessible planning process. We have found great success in this collaborative approach to assembling the ideal team. As an example, in our work with the City of San José, we worked closely with a Latino community organization. This organization hosted meetings with the community and invited us to facilitate the conversation. This partnership allowed us to create a space that community members felt safe and comfortable in and gain insights and ideas about how to make their community a better place. BerryDunn provided a translator/facilitator in facilitating this discussion to eliminate barriers to participation.


With the City, we look forward to coming together to exhibit care and respect for others, allow individuals to speak for themselves and teach us through their own authentic experiences; build trust with the City's stakeholders and establish mutual buy-in this process; and learn as much from you all as you will learn from us, as we all chart the best path toward the City's future. We look forward to coming together to make the City's stakeholders feel heard, respected, and partnered with in this strategic planning process.

Effectively Engaging the Public

We will utilize several strategies to effectively engage and collect data and information from the public, including developing communications and appropriate messaging, coordinating with our clients on engagement logistics, facilitating engagement during community events, conducting interviews, and creating an interactive project landing and engagement website via Social Pinpoint.

Social Pinpoint is a customizable community engagement platform that is used to inform stakeholders of project goals, objectives, and progress, and 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 the majority of Palm Desert 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.


Figure 3: Sample Social Pinpoint Strategic Plan Website



About the City and the Project

Welcome to the community engagement web page for the City of Port Arthur Strategic Plan. The Plan will guide the City's operations over the next five years. Once completed, it will align the City's budget and resources to strategic priorities and objectives.

Port Arthur is located 90 miles east of Houston. It is a major deepwater port on Sabine Lake and the Sabine-Neches and Gulf Intracoastal waterways, and is part of the "Golden Triangle." The City is known for its natural beauty, Cajun flavor, and proximity to Sabine Lake and Sea Rim State Park. It is also the official Cajun Capital of Texas.



How to Get Involved

The success of the Strategic Plan depends on input from people like you - who know and love the City of Port Arthur and have a vested interest in making it an even better place to live. To make the Strategic Plan work we need YOU! This is one of the engagement opportunities that will inform the City for the development of the strategic plan.


- Give us your thoughts on the ideas board
- Answer a few questions
- Take a poll
- Fill out the survey
- Attend the community forum

We hope you visit the website often to stay up-to-date about how strategic plan is progressing.

Project Phases

- ★ Phase 1: Project Initiation and Management
- ★ Phase 2: Community Engagement and Strategic Analysis
- ☆ Phase 3: Strategic Plan Development
- ☆ Phase 4: Implementation Action Planning

Past Events



Community Forum

🕒 Oct 23, 2024 6:00 PM - Oct 23, 2024 7:30 PM

📍 Robert A. "Bob" Bowers Civic Center, 3401 Cultural Center Drive, Port Arthur, TX, USA

All ages are welcome to come and give input on the future of the City! Listen to a short presentation, meet neighbors, and engage in discussion.

We have developed fully customized Social Pinpoint sites to support numerous clients. We invite the City to explore the following examples:



City of Capitola, California



City of Sunnyvale, California



City of Blue Springs, Missouri

Logic Modeling to Connect Objectives to Outcomes and Performance Measures

As evident in our work plan, implementation planning is a key component of our approach. Our goal is to produce a strategic planning document that the City can actively use to track progress and report outcomes to internal and external audiences. Implementation planning is a crucial part of our proposed approach, where our team will work with the City to develop an Implementation Roadmap that maps out how the organization will execute its strategic priorities. To achieve this process, our team will facilitate logic modeling sessions with the City, using a tool that prompts stakeholders to break down the building blocks of its strategic goals.

To facilitate the implementation process, we use logic modeling as depicted in Figure 4.

Figure 4: Logic Modeling Tool



3. 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 5 presents an overview of our work plan intended to achieve the City's goals and objectives for this important initiative.



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.

Figure 5: Work Plan Overview



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

Phase 1: Project Initiation 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 Palm Desert 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
- Relevant community initiatives
- Regional stakeholder strategic plans
- Previous employee and community surveys
- Program descriptions and data

Phase 1: Project Initiation and Management

- Past internal and external assessments
- Past strategic plans and associated material, including the City's existing Strategic Plan of 2013 – 2033
- Other existing planning and policy documents, organizational charts, staffing, and budgeting details
- Data from any previous community and stakeholder engagement efforts that are relevant to development of the Final City Strategic Plan
- Demographic, economic, and community data and forecasted trends from the U.S. Census Bureau, 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 and 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 and facilitator, 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

1.5 Monthly Steering Committee Meetings. We will conduct Monthly Steering Committee Meetings to inform involved participants of the activities and accomplishments for the reporting period and plans for the upcoming month. These meetings will also serve as an opportunity for stakeholders to ask questions, gain clarity, and buy into project progress. We will also use these meetings to highlight any work products and approaches that will contribute to deliverable development.

▲ Deliverable 3 – Monthly Steering Committee Meetings

Phase 2: Engagement and Strategic Analysis

2.1 Identify key stakeholders and stakeholder groups to include in the process and develop a framework and engagement strategy. We will assist the City in developing a framework and engagement strategy, first compiling a list of stakeholders and stakeholder groups we should engage in this process and the best methods to leverage to engage them. The strategy will also include developing communications and messaging to build awareness for the process, its intended outcomes, and opportunities for stakeholders to get involved, as well as to keep City Council, City staff, and community stakeholders informed about the strategic planning process and options for the future. We will review messaging and communications with the City's project team before finalizing and working with the City's project team to distribute them.

2.2 Develop a communications strategy. We will develop engagement plans for internal and external stakeholders. Working collaboratively with the City's communications staff, we will develop a communications strategy to promote transparency, information-sharing, participation, and buy-in for the strategic planning process. We will be mindful of stakeholders' needs and preferences when developing this strategy in an effort to be inclusive and welcoming of their engagement in this process. We will support the City in creating a plan that has broad community engagement and train and support City staff in executing this engagement plan.

2.3 Coordinate stakeholder engagement logistics. We will coordinate stakeholder engagement logistics for community forums, stakeholder roundtable meetings, pop-up events, steering committee visioning, and interviews. This will include scheduling and handling the details for alternative community engagement activities such as meetings-in-a-box, pop-up events, listening cafes, interactive workshops, and virtual platforms. There is a highly interactive piece to this with the use of Social Pinpoint and technology to engage a wide variety of stakeholders internal and external to the City. Some options will be in-person and some will be virtual.

2.4 Develop a project kickoff presentation and facilitate project orientation meetings. We will develop a kickoff presentation to support project orientations held for City's Steering Committee, leadership, City project team, and 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 Palm Desert Strategic Plan. We will review communications and the kickoff presentations with the City's project team in a Biweekly Project Status Meeting before finalizing and distributing the final versions.

2.5 Develop the City's Social Pinpoint site. 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 Palm Desert 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 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.

This will include an employee engagement survey to ask what employees want in the future as well as reviewing and refining priorities and proposed projects. This engagement will involve gathering thorough feedback through focus groups and meetings to help ensure staff input is effectively integrated into the strategic planning process.

2.6 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 help us produce an Initial Environmental Scan and Strategic Analysis that will inform engagement activities.

Phase 2: Engagement and Strategic Analysis

2.7 Review current strategic plan. We will conduct meetings with current department heads, staff, and the City Manager's office to understand what worked well, what could be improved, the areas that were accomplished, and the areas that need more support. We will provide the City with a document that analyzes and supports the growth the City seeks for the future. We will review the draft of the Current State Report with the City's project team before updating it to final done as part of Biweekly Project Status Meetings.

▲ Deliverable 4 – Current State Report

2.8 Conduct initial interviews. We will interview key individuals identified by the City including individual and group interviews and focus groups with the City's elected officials, senior leadership, key staff, and community stakeholders, as appropriate, to thoroughly review and assess services and the needs of the community. These interviews will be a mix of in-person and virtual. They will be guided by previously developed questions and protocols. Working with these diverse 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.

2.9 Conduct community forums. We will conduct three community forums at various times of the day for maximum engagement. By conducting forms in the morning, mid-day, and evening hours so we can accommodate more schedules and reach a broader range of residents.

2.10 Synthesize information gathered and develop a draft 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 and Strategic Analysis. 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; a detailed strengths, weaknesses, opportunities, and challenges analysis (SWOC); and discovery outcomes. This will be presented to the City's project team to solicit input and gain consensus.

2.11 Present the draft Initial Environmental Scan. Buy-in and consensus throughout the strategic planning process is critical to making future progress on the City's Strategic Plan. This presentation will provide the City Steering Committee with clarity with regard to the status of the City's current environment and shine a light on opportunities to improve and make progress toward its North Star vision. In this meeting, we will answer any questions and collect suggested edits for inclusion. This will also be presented to City project team as part of Biweekly Project Status Meetings. We can also present the Environmental Scan to the Steering Committee (done as part of Biweekly Project Status Meetings in D2).

▲ Deliverable 5 – Initial Environmental Scan

2.12 Update Environmental Scan and Strategic Analysis to final. We will develop the Final Environmental Scan and Strategic Analysis to include findings from the interviews, events, and community forums. This analysis will include identifying successes, areas for improvement, and opportunities for innovative approaches). We will present the Final Environmental Scan and Strategic Analysis to the City's project team done as part of Biweekly Project Status Meetings. In addition, we can present it to the steering committee as part of the Monthly Steering Committee Meetings (done as part of Biweekly Project Status Meetings in D2).

▲ Deliverable 6 – Final Environmental Scan and Strategic 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. Each session's design and agenda will guide strategic planning progress and will include a presentation of the Final Environmental Scan and Strategic 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 refining the City's vision, mission, values, strategic priorities, and goals with the City leadership. This session will be guided by the previously developed meeting design and agenda, as well as the Final Environmental Scan and Strategic Analysis. We will use the ICA ToP® facilitation methodology, designed to produce group consensus. We will document the outcomes of this session to review with the City's project team and plan for next steps.

3.3 Facilitate strategic planning session 2. Strategic planning session 2 will be conducted with City leadership and staff and will focus on refining strategic objectives and actions and performance measures. It will be guided by the previously developed meeting design and agenda, outcomes of strategic planning session 1, and the Final Environmental Scan and Strategic Analysis. 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 project team to finalize objectives and performance measures. The measures will be quantifiable in terms 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 and performance evaluation to help ensure effective tracking and monitoring.

3.5 Develop and present the Initial City of Palm Desert 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 apply Government Finance Officers Association (GFOA) Strategic Planning Best Practices checklist to help ensure the City's plan meets GFOA requirements, which will include timetables for achievements and may include measurable goals. The draft Strategic Plan will be grounded in a realistic assessment of staff and funding capacities based on input from the executive team and staff. We will also make resource adjustment recommendations for successful implementation. We will review plan the draft with City project team and incorporate input.

We will review this draft with the City's project team and prepare a presentation to present the Initial City Strategic Plan Draft to City leadership in a work session done as part of the Biweekly Project Status Meetings. In addition, we will present the Strategic Plan to the steering committee as part of the Monthly Steering Committee Meetings.

3.6 Conduct work sessions to refine strategic direction and performance measures. We will conduct virtual work sessions with the City's project management team and inter-departmental working groups to refine strategic objectives and performance measures to integrate with the City's budget development process. We will align funding allocations for staffing resources and capital investments and identify persons responsible for implementing strategic objectives and tracking performance.

Phase 3: Strategic Plan Development

3.7 Present the Draft Plan to the City Council. Once the Strategic Plan is drafted, we will prepare a presentation of the Initial City Strategic Plan Draft. We will present the plan in person to the City Council. As we refine the presentation, we will present the presentation to the City's project team and steering committee to provide feedback and make any final changes to the presentation before the City Council work session. These tasks will take place as part of our Biweekly Project Status Meetings and Monthly Steering Committee Meetings. The work sessions with the City Council will be an opportunity for input before updating the draft plan to final.

▲ Deliverable 7 – Initial City of Palm Desert Strategic Plan Draft

3.8 Discuss final plan design. We will meet with the City's project team to discuss the design of the Strategic Plan and decide on a format, including a visually appealing and graphically designed plan that can be posted on the City's website and integrated into dashboards. We will then prepare a final version of a graphically designed draft Strategic Plan that incorporates any City Council-requested changes.

3.9 Prepare Implementation Roadmap. We will prepare an Implementation Roadmap and conduct an implementation planning orientation meeting with City staff. As needed, we offer the option to also present the roadmap to the City Council.

3.10 Present Final Strategic Plan. We will present the Final City of Palm Desert Strategic Plan to the City Council for adoption at a regular City Council meeting. The final report will deliver a thorough and user-friendly Strategic Plan document that effectively communicates the City's vision and priorities. We will develop visually engaging and accessible digital presentations tailored for stakeholders and public outreach.

▲ Deliverable 8 – Final City of Palm Desert Strategic Plan

Phase 4: Implementation Action Planning and Performance Management

4.1 Develop and customize an implementation action plan. We will develop an Implementation Roadmap that will identify resources, partners, department and division leads, anticipated timelines, interdependencies, actions, and other information to help enable the plan implementation and progress reporting process. This 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 Mayor and City Council Strategic Plan.

4.2 Facilitate implementation action plan development meetings. We will conduct meetings with City departments and leadership to support action items for the Implementation Roadmap to help ensure the Strategic Plan is in alignment with the budget. We will deliver a detailed Implementation Roadmap with timelines, measurable outcomes, and accountability structures.

4.3 Develop strategic plan progress reports. We will develop regular update reports, including monthly, quarterly, and annual, that track the City's goals, metrics, and progress in a clear and transparent manner. These reports will be presented as a companion report that is graphically designed to match the final strategic plan. This task will also include communication activities and messaging to the City staff and community. We will review the reports and implementation action plan with the City project team during our Biweekly Project Status Meetings before updating to final.

Phase 4: Implementation Action Planning and Performance Management

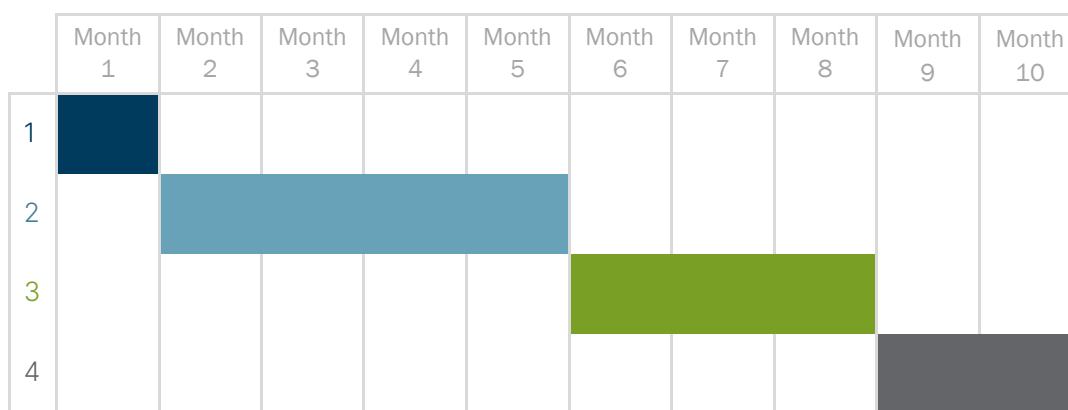
4.4 Develop organizational process improvement methodology and framework. We will work with the City to develop an organizational process improvement methodology and framework using change management principles, such as the Prosci® change management methodology and Process Improvement Champions, to assist in the implementation of the City's Strategic Plan. This will include identifying what changes the organization will need to make to successfully implement the finally adopted Strategic Plan.

▲ Deliverable 9 – Implementation Roadmap and Reports

4. Anticipated Schedule

Below, in Figure 6, we highlight our proposed project schedule for the City's requested work effort. We are happy to adjust this schedule to best accommodate the City's needs, as appropriate. It should be noted that ongoing status reports and monthly meetings with the steering committee will remain consistent throughout the project.

Figure 6: Anticipated Schedule



Seth Hedstrom, PMP®, LSSGB

PRINCIPAL / PROJECT PRINCIPAL

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

BS, Business Management,
Babson College

Project Management
Professional® (PMP®), Project
Management Institute®

Lean Six Sigma Green Belt
Certified

Diversity and Inclusion
Certificate, Cornell University

AFFILIATIONS AND MEMBERSHIPS

- Associate Member,
Government Finance
Officers Association

SELECT CLIENTS

City of Alameda, CA
City of Capitola, CA
City of Colorado Springs, CO
City of Fountain Valley, CA
City of Indio, CA
City of La Mesa, CA
City of Long Beach, CA
City of Menifee, CA
City of Novato, CA
City of Redlands, CA
City of San José, CA
City of Washougal, WA
Jefferson County, WA
Lane County, OR
Santa Clara County, CA

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.

RELEVANT 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.

Business Process Improvement: Seth has provided business process improvement services for many BerryDunn clients, either as a stand-alone engagement or as part of an enterprise system selection. His experience includes documenting as-is business processes, benchmarking processes with similar organizations, introducing industry best practices, and developing to-be business process recommendations.

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.

Michelle Kennedy, Prosci® CCP, ODCC

MANAGER / ENGAGEMENT MANAGER AND FACILITATOR

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

BA, Journalism/Mass Communication, Iowa State University

Certified: Hogan Leadership Assessment System®, Myers Briggs Type Indicator®, Institute of Cultural Affairs (ICA) Technology of Participation® (ToP®)

ICA ToP Facilitation Methodology

Prosci® Certified Change Practitioner

Organization Development Certified Consultant (ODCC)

SELECT CLIENTS

City of Beaverton, OR
City of Capitola, CA
City of Colorado Springs, CO
City of Gresham, OR
City of Indio, CA
City of Menifee, CA
City of Redlands, CA
City of San José, CA
City of Santa Monica, CA
City of Springfield, OR
Lane County, OR
Marion County, OR
San Mateo County, CA
Santa Clara County, CA

Michelle is a manager in our Local Government Practice Group. She brings three decades of consulting experience in organizational assessment, stakeholder engagement, strategic and business planning, leadership development and executive coaching, OCM, program evaluation, business process improvement, and performance measurement. Prior to consulting, Michelle served for 13 years as a senior-level executive in government and higher education.

RELEVANT EXPERIENCE

Strategic Planning: Michelle has developed strategic plans for more than 70 public sector organizations. She actively involves and engages the community, as well as the organization, to gain views for the vision, mission, and goals and helps to prioritize initiatives to yield achievable and measurable outcomes. Most of Michelle's strategic planning clients have retained her to provide updates.

Organizational Assessments: Michelle is an expert in conducting assessments related to organizational structure and culture, the methods and tools related to the delivery of organizational programs and services, and the culture of the organization. Her reviews also include assessing leadership structures, roles, and styles; methods of knowledge and skill preservation; and succession strategies and plans.

Change Management: Michelle recognizes the importance of change management in all the projects she is involved in. She is well-versed in conducting change readiness assessments, involving key stakeholders in the decision-making process to promote buy-in and build consensus, and actively monitoring project progress to help ensure that resistance is addressed early-on.

PUBLICATIONS AND PRESENTATIONS

- Presentation at the Oregon Recreation and Parks Association (ORPA) Annual Conference, 2019: Rivers of Change Oceans of Opportunity: Planning Your Strategy During Turbulent Times
- Presentation at "Results Washington" Lean Transformation Conference, 2018: Transforming the Municipal Development Review Process Using Lean Practices
- Presentation at the American Public Human Services Association (APHSA) Annual Conference, 2015: Developing Future Health and Human Services Leaders

Maddison Powers Spencer, MPA

SENIOR CONSULTANT / PROJECT MANAGER AND FACILITATOR

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

MPA, Local Government,
University of North Carolina at
Chapel Hill, School of
Government

BS, Political Science, Northern
Arizona University

Institute of Cultural Affairs
(ICA) Technology of
Participation® (ToP®) Certified

PRESENTATIONS

- ICMA Conference, 2021,
Portland, OR, How
Millennials are Changing
Local Government

SELECT CLIENTS

City of Beaverton, OR
City of Blue Springs, MO
City of Capitola, CA
City of Colorado Springs, CO
City of Ennis, TX
City of Eugene, OR
City of Indio, CA
City of Menifee, CA
City of Port Arthur, TX
City of San José, CA
City of Sunnyvale, CA
City of Washougal, WA
City of Westminster, CO
Jefferson County, WA
Santa Clara County, CA
Vancouver Housing Authority,
WA

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 ICA 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 over 35 local government strategic plans. Maddison has performed similar roles on engagement and strategic planning projects with the Cities of Menifee, Indio, Capitola, California; the City of Ennis, Texas; and Santa Clara County, California.

RELEVANT EXPERIENCE

Project Management and Support: Maddison is well-organized and detail-oriented, supporting her in her ability to effectively manage projects and provide support to her colleagues and the clients she serves. She is well versed in documenting outcomes, researching and analyzing documents and data, and managing various priorities to promote success and productivity. In addition, she has experience with scheduling, reporting, and seeking opportunities for business process improvement.

Local Government: Maddison is the former assistant to the city manager for the City of Covington, Georgia. In that role, she worked across city departments in an effort to manage priorities, develop recommendations, conduct research, support community needs, and develop reports for the city mayor and city council. In addition, Maddison served as a senior fellow through the International City/County Management Association (ICMA) fellowship. In this role she managed the recruitment and hiring for two assistant city managers, led a leadership development initiative to develop more women leaders in the organization, and managed an annexation study to understand the impact of service delivery for various city groups.

Facilitation and Engagement: Maddison is skilled in developing stakeholder and community engagement messaging for residents, businesses, key groups, leadership, and governing bodies. She focuses on collaborating on a communications strategy to help ensure clear and consistent messaging reach a broad range of people. Her experience as a facilitator and program manager supports her coordination of logistics for various community engagement activities, such as interviews, focus groups, roundtables, and community events. Maddison's focus is on creating a multifaceted outreach strategy promotes inclusive participation throughout the strategic planning process.

Research and Analysis: Maddison is well versed in conducting research and analysis. Notably, she has leveraged survey tools, conducted data analysis, facilitated focus groups, and researched issues of importance to develop recommendations and share findings with organization leadership. As such, her approach is centered on using sound evidence and data to drive decision-making and organizational and operational improvement.

Jen Ferguson, MPA

SENIOR CONSULTANT / FACILITATOR

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

MPA, Evans School of Public Policy and Governance, University of Washington

BS, Business Management, Stritch University

Senior Executive Institute, University of Virginia

Institute of Cultural Affairs (ICA) Technology of Participation® (ToP®) Certified

AFFILIATIONS AND MEMBERSHIPS

- Government Finance Officers Association (GFOA)
- International City/County Management Association (ICMA)

SELECT CLIENTS

Bloomfield Township, MI
City of Blue Springs, MO
City of Eugene, OR
City of Foley, AL
City of Indio, CA
City of Port Arthur, TX
City of Janesville, WI
City of Waukesha, WI
St. Johns County, FL

Jen is a senior consultant in our Local Government Practice Group. She has over 25 years of public-sector experience and significant expertise in strategic and financial planning. Jen has led, planned, and coordinated fiscal affairs for cities across Washington and Minnesota, holding influential leadership positions such as city administrator, director of finance, and executive director for an Economic Development Authority. Supplementing her background in public-sector administration, Jen is well versed in, organizational development, performance management, operations and process improvement, economic and business development, and enterprise resource planning implementations.

RELEVANT EXPERIENCE

Local Government: Extensive, hands-on experience in the public sector has given Jen in-depth knowledge of city operations, including staffing, facility, and fleet management. She has a demonstrated history of directing resources to ensure optimum service delivery and support the economic vitality of local business.

Financial Management and Planning: Jen's experience leading fiscal affairs includes budget development and administration, long-term financial planning, accounting, audit, payroll, investment management, debt management, and billing and collections. As director of business development and finance for the City of Waconia, Minnesota, Jen prepared and maintained a 20-year financial management plan, with an integrated 10-year capital improvement plan to support long-term objectives.

Organizational Development: Jen specializes in development and planning at both the departmental and city level, guiding operations to achieve long-range strategic goals. She has both facilitated and consulted on organizational assessments, economic development programs, as well as projects focused on process improvement. Jen has additional leadership experience in human resources programs, including personnel retention, and performance management.

Information Technology and Systems Management: Throughout various roles, Jen has worked to integrate technology to optimize organizational processes. She led the implementation of a city-wide enterprise software project and continually developed information services providing e-government services delivery. Her experience includes overseeing information services departments and advising organizations on ERP software implementation.

Karen Whichard, MPA, Prosci® CCP

SENIOR CONSULTANT / FACILITATOR

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

MPA, University of North Carolina Charlotte

BA, Journalism and Mass Communication, University of North Carolina at Chapel Hill

Prosci® Certified Change Practitioner

SELECT CLIENTS

City of Capitola, CA

City of Colorado Springs, CO

City of Foley, AL

City of Margate, FL

City of New Braunfels, TX

City of Sarasota, FL

DuPage County, IL

Lake County, IL

Metro Nashville, TN

Orange County, NC

Onslow County, NC

Tompkins County, NY

St. Johns County, FL

Karen is a senior consultant 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.

RELEVANT 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.

Financial Management: As a member of the City of Charlotte Strategy and Budget Department, Karen provided operating and capital budget oversight of 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, 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, 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 of Davidson's first AAA bond rating.

Bailey Dickinson, MPA

CONSULTANT / RESEARCH ANALYST

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

MPA, University of Georgia

BA, Political Science, University of Georgia

BA, Communication Studies, University of Georgia

Public Affairs Professional Certificate, Applied Politics, University of Georgia

Certified Public Manager, Carl Vinson Institute of Government

Grant Writing Certificate, Georgia Center for Continuing Education

AFFILIATIONS AND MEMBERSHIPS

- Georgia City / County Management Association, Scholarship Committee

SELECT CLIENTS

City of Apopka, FL

City of Blue Springs, MO

City of Eugene, OR

City of Homestead, FL

City of Indio, CA

City of Margate, FL

Housing Authority of the City of Erie, PA

Bailey Dickinson is a consultant in our Local Government Practice Group. His wide-ranging experience in the public sector has given him broad exposure to aspects of local government administration, including strategic planning, research, and grants management. As special projects coordinator for the City of Covington, Georgia, he led award-winning community projects and managed strategic planning across departments. Skilled in research and program development, he has overseen research initiatives, supported policy analysis, and contributed to government training curricula over the course of his career.

PROJECT EXPERIENCE

Local Government: Bailey served as both the special projects coordinator and assistant to the city manager during his time with the City of Covington, Georgia. He led Covington's two winning applications for the Georgia Municipal Association's (GMA's) Visionary City Award—awarded for excellence in community engagement. His experience as a graduate research assistant with Carl Vinson Institute of Government exposed him to multiple facets of local government, where helped digitize training programs for associations such as the County Commissioners of Georgia and the Georgia City and County Management Conferences.

Strategic Planning: As Covington's special projects coordinator, Bailey managed the City's strategic planning initiatives in partnership with the GMA, aligning departmental objectives and community goals. His responsibilities included facilitating public engagement initiative groups, researching municipal management best practices, writing organizational policies, and developing long-term departmental strategic plans.

Research and Analysis: While at the Carl Vinson Institute of Government, Bailey oversaw undergraduate research initiatives, maintained communication with legislative offices, and tracked research progress. He further honed his analytical abilities as a legislative fellow for a former U.S. senator, where he conducted policy research on issues related to economic development, agriculture, transportation, and energy, contributing to informed decision-making.



Appendix B. Work Samples

On the following pages, we provide work samples of previously developed strategic plans for the City's review.



The bluebonnet spirit of Texas
STRATEGIC PLAN • 2023-2028

LETTER FROM THE MAYOR



Dear Ennis Community,

On behalf of our elected officials and City staff, I want to thank you for choosing Ennis as your home. We want you and your families to continue to thrive in Ennis and embrace all the charming qualities we know and love. As a lifelong Ennis resident, it brings my heart so much fulfillment to see our wonderful city on a forward-moving path. Over the last seven years, we have experienced growth and change at a pace we never thought was possible and this is just the beginning! As we move along this path, it is crucial to have a compass to guide us as we serve you. This is the purpose of the city-wide Strategic Plan: to act as a guide to ensure we uphold our commitment to you and are held accountable.



I look forward to seeing this plan in motion as we move toward a bright, prosperous future for Ennis.

Mayor Angeline Juenemann



LETTER FROM THE CITY MANAGER



Greetings from your City Manager

I am writing today to let you know how excited I am about our soon to be minted Strategic Plan. Over the years, we have developed several master plans to include, a Comprehensive Plan, a Downtown Master Plan, a Parks Master Plan, Water & Wastewater Master Plans, and soon we will develop an Airport Master Plan. While these various master plans address specific areas and aspects of making Ennis a better place to live, work and raise a family, it's the Strategic Plan that provides a comprehensive framework to focus the work and priorities of the City staff toward accomplishing specific goals.



The Strategic Plan is a tangible expression of our representative democracy. We elect members of the community to serve as your representatives on the City Commission and through them, your wants, needs and priorities have become the Strategic Plan. Our Mission Statement describes our purpose and reason for existing. Our Vision Statement defines our desired future and provides direction for where we want to go as a community. Guiding Principles determine how the City staff will conduct its business, make decisions, and deliver programs and services to the community. Strategic Priorities and the supporting Objectives and Performance Measures define the specific things the city staff needs to focus on.

I firmly believe one of the key components driving the growth, prosperity, and improving quality of life in our city is what I call "Strategic Discipline." I am proud of our collective ability and willingness to "stick to the plan" even when it takes many years to fully implement the plan. I am confident the Strategic Plan will lead us into a bright and wonderful future for ours and future generations.

I am especially grateful to our elected officials and the many citizens and stakeholders who actively participated in this important and consequential process.

The City Team will work hard every day to make our shared Vision of the future a reality!

City Manager Marty Nelson



Our Government

The legislative and governing body of the City of Ennis consists of a Mayor, Mayor Pro Tem, and five Commissioners. The City Commission is elected on a non-partisan basis with individual Commission members elected to three-year staggered terms. Five of the Commission members are elected from their respective single member wards. The Mayor and Mayor Pro Tem are elected at large. The City of Ennis has operated under the Commission-Manager form of government since 1956. The City Commission is responsible for passing ordinances, adopting a budget, appointing committees, and hiring the City Manager, City Secretary, City Attorney, and City Judge.

Regular meetings of the City Commission are held the first and third Tuesday of each month at 6:30 P.M. in the City Commission Chambers, 107 N. Sherman St., Ennis, TX 75119.



Angeline Juenemann, Mayor

Jake Holland, Mayor Pro Tem

Rowdy Pruitt, Commissioner Ward 1

Bruce Jones, Commissioner Ward 2

Kameron Raburn, Commissioner Ward 3

Shirley Watson, Commissioner Ward 4

Bill Honza, Commissioner Ward 5



ENNIS TEXAS

The bluebonnet spirit of Texas

Mission Statement



Provide quality services equitably across the bluebonnet city that creates a family-friendly community with a shared sense of belonging sustained for generations to enjoy

Vision Statement



Ennis sustains its small-town atmosphere and identity while promoting growth and development, as well as providing opportunities for all to thrive in a safe, inclusive, and creative community.

Guiding Principles



Transparent and Ethical

We communicate and carry out the city's responsibilities with integrity.
We are committed to serving with the highest ethical standards and professionalism.

Financial Responsibility

We manage all resources entrusted to our care for the benefit of current and future generations.

Equity and Fairness

We achieve equitable outcomes by drawing upon community diversity in decision making.

Thoughtful and Innovative

Together with our community partners, we encourage creative and cutting-edge ideas, and apply new thinking and methods to proactively address issues and solve problems at the source.

Approachable and Compassionate Service

We are an open and responsive city government, serving with dignity, respect, empathy, and kindness.

Valuing Our Employees

We continuously invest in the growth, professional development, and well-being of our employees while creating a diverse, friendly, supportive, and productive environment where employees thrive and are engaged.



Improve the relationship between City staff and the public by providing open two-way communication that creates greater transparency and opportunities for the public to participate in governmental activities.

OBJECTIVES

- Use multiple platforms and media to enhance citizen communication.
- Create more transparent communication opportunities for Police Department policies and procedures to enhance public trust.
- Develop a community engagement strategy to promote citizen involvement in the local government and community.
- Deliver effective and equitable customer service to improve citizens' experience with their city government.
- Provide accurate, consistent, and frequent communication to the public to increase transparency and awareness.
- Establish a bilingual outreach and communication plan to equitably communicate with our community.

PERFORMANCE MEASURES

- Increase communication frequency.
- Increase the diversity of communication mediums.
- Increase the engagement rate through City quarterly email updates.
- Increase number of volunteers for City boards and commissions.
- Increase attendance and participation in civic organizations and activities.
- Increase Police Department community engagement.
- Increase Fire Department community engagement.
- Increase Ennis CARES community engagement.
- Increase number of hours for staff training in customer service.
- Increase participation in quarterly town-hall meetings.
- Finalize bilingual outreach and communication plan before September 2024.



SAFE AND HEALTHY COMMUNITY

Engage the community through education and outreach, invest in innovative programming, collaborative community partnerships, and provide the resources needed to help ensure public safety and wellbeing for people in Ennis.

OBJECTIVES

- Invest in personnel, training, equipment, technology, and professional education to enhance the delivery of public safety services (code enforcement, fire, health, police, public works, and social services).
- Work to ensure emergency response personnel are professionally trained, equipped and ready to quickly respond to disasters and threats to public safety.
- Implement community-based public safety services to develop an interactive and engaged relationship with the community.
- Collaborate with partners to support programs, initiatives, and services that promote public safety, environmental health, physical health, mental health, and longevity.
- Develop the Community Services Center and partner with other service providers to expand health and human services programming capacity.



PERFORMANCE MEASURES

- Percentage reduction in violent and property crimes that impact quality of life.
- Percentage improvement in response times to Police Department emergency calls as compared to the national standard.
- Percentage improvement in response times to Fire Department emergency calls as compared to the national standard.
- Percentage improvement in alarm answering and alarm processing time as compared to national standard.
- Maintain current ISO Public Protection Classification rating as defined by the Fire Suppression Rating Schedule.
- Increase access to food for community members experiencing hunger.
- Increase available food resources for eligible individuals.
- Increase number of non-duplicated client contacts for individuals and households experiencing food insecurity annually.
- Increase number of partnerships that provide social services support.
- Percentage increase in environmental education events and programming.
- Increase utilization of the Loan-A-Tool program.
- Increase number of hours for City staff safety training annually.
- Mitigate number of accidents by City staff with city vehicles and equipment.
- Increase access to mental health services through partner organizations.
- Percentage increase in voluntary compliance rates for code violations.
- Percentage decrease in number of code violations.
- Percentage decrease in time to resolve a code violation.
- Increase number of volunteers for code enforcement clean-up days.



Elevate life experiences throughout our community by providing residents and visitors with opportunities to enjoy events, entertainment, recreation, nature, and celebrate the City's diverse cultures and historic resources.

OBJECTIVES

- Implement the General Capital Improvement Plan (CIP) to provide the community with projects and facilities that enhance our quality of life.
- Revitalize our parks and enhance recreational opportunities by implementing the Parks Master Plan.
- Support parks and recreation programs, services, and facilities by ensuring equitable access for all.
- Facilitate and promote the use of public spaces for arts, culture, festivals and special events that make people feel welcome and connected to our community.
- Improve the overall beautification, appearance, and environmental sustainability of the city to promote a sense of pride for the community.
- Protect and preserve our heritage and historic resources through thoughtful land use, environmental stewardship, and sustainable practices.
- Improve mobility networks (sidewalks, walking and biking trails) to create a more connected Ennis that supports healthy lifestyles.
- Provide accessible, modern and extensive library services to promote learning, literacy, and overall quality of life.
- Promote improved access to health care, social services, senior services and public transportation to improve the health and wellness of our community.



PERFORMANCE MEASURES

- Implement the CIP.
- Percentage increase in resident satisfaction with parks and recreational experiences/options.
- Increase participation in arts, culture, festivals and special events.
- Increase number of volunteer hours for Keep Ennis Beautiful events.
- Increase number of volunteers for Keep Ennis Beautiful events.
- Increase number of Keep Ennis Beautiful events.
- Increase number of citizen education presentations.
- Increase connectivity of trails, sidewalks and walkways.
- Increase satisfaction in library services.
- Construct the Community Service Center by December 2025.



THRIVING ECONOMY

Expand and grow the City strategically and thoughtfully so business and industry can thrive, residents have access to quality job opportunities, revenue is generated to sustain city government, and Ennis retains its small-town character and identity.

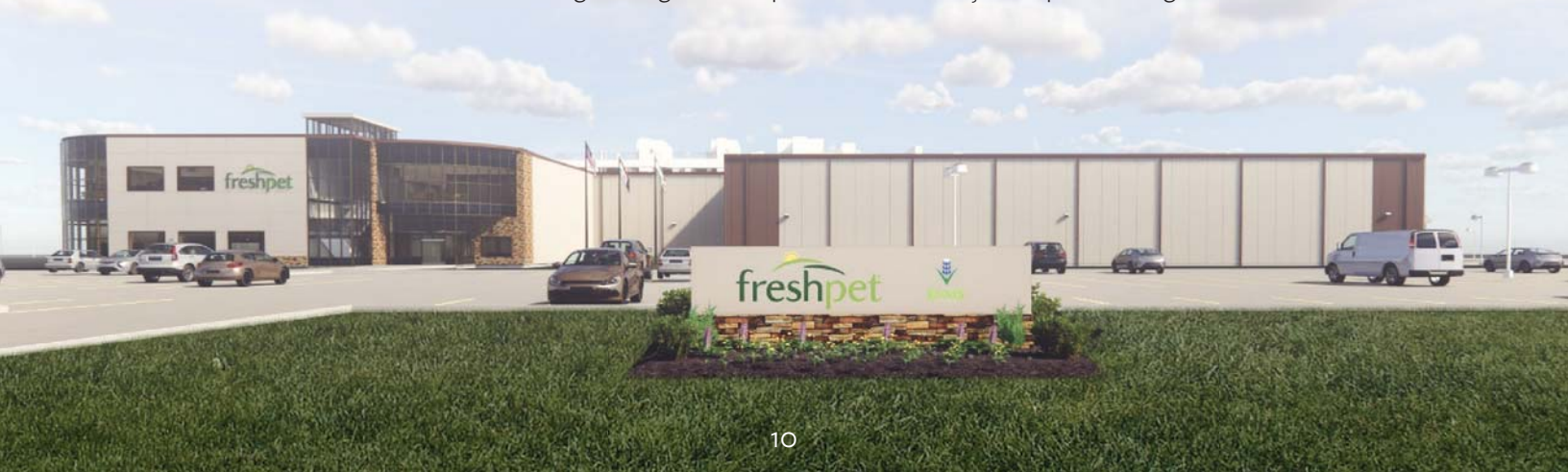
OBJECTIVES

- Encourage development throughout the community, with focuses on Bardwell Lake, Kaufman Corridor, and the Historic Downtown
- Implement the Downtown Master Plan to revitalize the Historic Downtown.
- Promote the City and its unique cultural and natural environment and spectacular wildflowers for tourism, events and activities that serve as our “first impression” with potential residents, investors and developers.
- Promote tourism through expansion of programs, activities, and facilities.
- Actively collaborate with the Chambers of Commerce to support the growth and prosperity of local businesses.
- Create, retain and sustain the growth of quality businesses to diversify the local economy (industrial, commercial, retail and restaurant development).
- Develop and implement a business recruitment strategy that results in higher-than-average wage jobs for Ennis residents.
- Enhance and expand workforce development initiatives to increase access to employment and career opportunities.
- Support residential development while working to ensure new neighborhoods are well planned and configured to support a healthy quality of life.
- Implement a marketing strategy that emphasizes our “Brand Story” and “Brand Identity” to present the City in the best possible light to attract new residents, investors, developers and businesses.
- Develop and implement an Airport Layout Plan to help ensure highest and best use of the municipal airport.



PERFORMANCE MEASURES

- Increase the per capita income.
- Increase the median household income.
- Increase sales tax revenue.
- Upward movement trended for a desirable balance of housing value.
- Increase employment opportunity awareness throughout the City and its partners.
- Increase number of employment opportunities in Ennis.
- Increase number of new businesses.
- Increase number of renovated historic buildings through historic preservation and façade improvement grants.



EXCEPTIONAL PUBLIC SERVICE



Invest in resilient infrastructure and the provision of vital public services that enhance safety, community connectivity, and quality of life.

OBJECTIVES

- Invest in personnel, training, equipment, technology and professional education to enhance the delivery of public services and improve customer service.
- Invest in all critical infrastructure per the CIP to create resilient systems capable of supporting current customers while enabling and supporting new growth and development.
- Develop and implement a Utility CIP based on the Water Master Plan and Wastewater Master Plan to improve and expand quality infrastructure.
- Develop and implement the Pavement Management Plan to guide future investments in street maintenance and repair.
- Implement the Stormwater Master Plan to guide development.
- Develop and implement a plan for sidewalk improvements to enhance mobility.
- Create a customer service center to improve access to information and resolve issues for the community.



PERFORMANCE MEASURES

- Increase number of training hours per employee.
- Increase attendance at annual professional association conferences.
- Mitigate number of employee work-related accidents.
- Maintain required employee certifications.
- Assess the Fleet Replacement Program.
- Implement the CIP.
- Implement the Pavement Management Plan.
- Increase on-site inspections of construction projects.
- Increase sidewalk connections and improvements.
- Increase number of issues resolved through the customer service center.



HOW DID WE BUILD THIS PLAN?



Online interactions
with Social Pinpoint

3440



Survey responses **154**



Interviews **12**



Focus groups **10**



Community forums **2**



Commission workshops **2**



City Leadership meetings **10**



Social media posts **18**



Social media engagements **25000**



Emails in a newsletter **500**

PROJECT TIMELINE



Putting the Plan into Action

Built to endure the changes of a five-year period while staying relevant, this Strategic Plan is high level. This means it says what the City will focus on to achieve the desired future for Ennis. The City's departments will work together to develop detailed implementation plans that lay out the actions required to fulfill each strategic goal and objective.

We are committed to focusing resources on the priorities that best serve the needs and desires expressed by our community and captured in this plan. As needs or opportunities shift during the life of the plan, the City expects to address any needed changes as part of the City's budget process.

The City will also address the six guiding principles identified by the City Commission during the strategic planning process.

Guiding Principles



Transparent and Ethical

Financial Responsibility

Equity and Fairness

Thoughtful and Innovative

Approachable and Compassionate Service

Valuing Our Employees

These guiding principles are expectations for how the City makes decisions and delivers services. Employees will apply these principles in their day-to-day work.

Keeping Track of Progress

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

The City will monitor progress toward our Strategic Plan goals and objectives, as well as report on the performance measures. Tracking keeps us transparent and holds us accountable.

The City will provide the community with an annual report and year-end Commission presentation. Community members can expect to understand what the City is working on and the benefits that will result for residents, businesses, and the community overall.

Monthly

City staff will meet and discuss progress on strategic plan goals and objectives.

Quarterly

City leadership will provide the City Manager with updates on progress toward each strategic priority and goal.

Twice A Year

The City Manager will provide the City Commission with an update on progress toward each strategic priority and goal, including successes and challenges.

Annually

The City Manager will provide a year-end report detailing progress on each strategic goal and objective. The report will be presented to the Commission and posted on the City's website, www.ennistx.gov, for community access.

ACKNOWLEDGEMENTS

This strategic plan is a vital tool that will be used to help us better serve our community. It was developed through a combined effort that involved citizens, City staff, elected officials, and key stakeholders. We are thankful to everyone who saw the importance of this plan and dedicated their time over the past few months to bring it to life. We also want to thank the consulting team at BerryDunn for leading this process and providing guidance throughout.

City Commission



Angeline Juenemann, Mayor
Jake Holland, Mayor Pro Tem
Rowdy Pruitt, Commissioner Ward 1
Bruce Jones, Commissioner Ward 2
Kameron Raburn, Commissioner Ward 3
Shirley Watson, Commissioner Ward 4
Bill Honza, Commissioner Ward 5

City Senior Staff

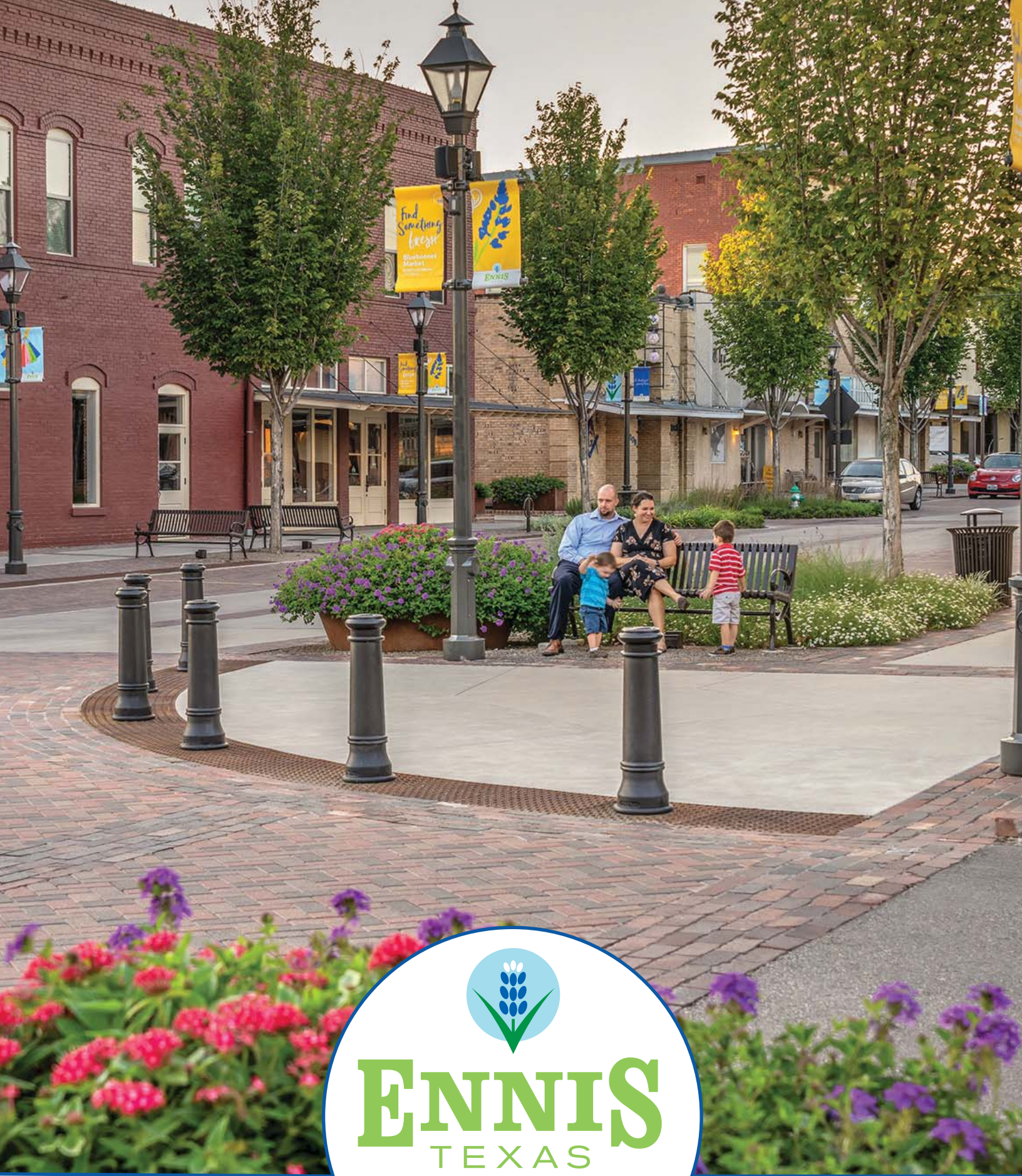


| | |
|---------------------------------|---|
| Marty Nelson, City Manager | Irene Kasujja, Human Resources |
| David Anthony, Capital Projects | Paul Liska, Parks & Recreation |
| Stephen Barnes, Finance | Becky McCarty, Downtown & Tourism |
| Ashley Colunga, Marketing | Dustin Munn, Police Chief |
| Jessica Diaz, Library | Mark Richardson, Planning & Development |
| Bill Evans, Fire Chief | Angie Wade, City Secretary |
| Ed Green, Public Works | Jim Wehmeier, Economic Development |
| Kevin Howard, Health | Chad Wester, Fire Marshal |

BerryDunn Consulting Team



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



The bluebonnet spirit of Texas
STRATEGIC PLAN • 2023-2028



The bluebonnet spirit of Texas

PLAN ESTRATEGICO • 2023-2028

UNA CARTA DE SU ALCALDESA



Estimada comunidad de Ennis,

En nombre de nuestros funcionarios electos y el personal de la ciudad, quiero darle las gracias por elegir Ennis como su hogar. Queremos que ustedes y sus familias sigan prosperando en Ennis y disfruten de todas las cualidades encantadoras que conocemos y amamos. Como residente de Ennis de toda la vida, me llena el corazón ver que nuestra maravillosa ciudad avanza hacia el futuro en un camino hacia adelante. En los últimos siete años, hemos experimentado un crecimiento y un cambio a un ritmo que nunca pensamos fuera posible, ¡y esto es sólo el principio! A medida que avanzamos por este camino, es crucial contar con una brújula que nos guíe mientras les servimos. Este es el propósito del Plan Estratégico para toda la ciudad: servir de guía para garantizar que mantenemos nuestro compromiso con ustedes y que rendimos cuentas.



Espero ver este plan en marcha mientras avanzamos hacia un futuro brillante y próspero para Ennis.

Alcaldesa Angeline Juenemann



Saludos de su Director Municipal

Les escribo hoy para hacerles saber lo entusiasmado que estoy con nuestro pronto Plan Estratégico. Con los años, hemos desarrollado varios planes maestros para incluir, un Plan Integral, un Plan Maestro del Centro, un Plan Maestro de Parques, Agua y Aguas Residuales Planes Maestros, y pronto vamos a desarrollar un Plan Maestro del Aeropuerto. Si bien estos diversos planes directores abordan áreas y aspectos específicos para hacer de Ennis un lugar mejor para vivir, trabajar y formar una familia, es el Plan Estratégico el que proporciona un marco global para centrar el trabajo y las prioridades del personal de la ciudad hacia la consecución de objetivos específicos.



El Plan Estratégico es una expresión tangible de nuestra democracia representativa. Elegimos a miembros de la comunidad para que sean sus representantes en la Comisión Municipal y, a través de ellos, sus deseos, necesidades y prioridades se han convertido en el Plan Estratégico. Nuestra Misión describe nuestro propósito y nuestra razón de ser. Nuestra Declaración de Visión define nuestro futuro deseado y proporciona la dirección hacia dónde queremos ir como comunidad. Los Principios Rectores determinan la forma en que el personal de la ciudad llevará a cabo sus actividades, tomará decisiones y ofrecerá programas y servicios a la comunidad. Las Prioridades Estratégicas y los Objetivos y Medidas de Rendimiento que las sustentan definen los aspectos concretos en los que debe centrarse el personal de la ciudad.

Creo firmemente que uno de los componentes clave que impulsan el crecimiento, la prosperidad y la mejora de la calidad de vida en nuestra ciudad es lo que yo llamo “Disciplina Estratégica”. Estoy orgulloso de nuestra capacidad y voluntad colectivas de “ceñirnos al plan”, incluso cuando se tarda muchos años en aplicarlo plenamente. Confío en que el Plan Estratégico nos conducirá a un futuro brillante y maravilloso para nosotros y para las generaciones futuras.

Estoy especialmente agradecido a nuestros cargos electos y a los numerosos ciudadanos y partes interesadas que han participado activamente en este importante y trascendental proceso.

El equipo de la ciudad trabajara duro cada día para hacer realidad nuestra visión compartida del futuro.

Director Municipal Marty Nelson



Nuestro Gobierno

El órgano legislativo y de gobierno de la ciudad de Ennis está formado por un alcalde, un alcalde interino y cinco comisionados. La Comisión de la Ciudad es elegida sobre una base no partidista con los miembros individuales de la Comisión elegidos por períodos escalonados de tres años. Cinco de los miembros de la Comisión son elegidos de sus respectivos distritos uninominales. El alcalde y el alcalde interino son elegidos por sufragio universal. La ciudad de Ennis ha funcionado bajo la forma de gobierno Comisión-Gerente desde 1956. La Comisión Municipal es responsable de aprobar ordenanzas, aprobar el presupuesto, nombrar comités y contratar al Administrador Municipal, al Secretario Municipal, al Abogado Municipal y al Juez Municipal.

Las reuniones regulares de la Comisión de la Ciudad se celebran el primer y tercer martes de cada mes a las 6:30 P.M. en las Cámaras de la Comisión de la Ciudad, 107 N. Sherman St., Ennis, TX 75119.



Angeline Juenemann, Alcaldesa

Jake Holland, Alcalde Provisional

Rowdy Pruitt, Comisionado 1

Bruce Jones, Comisionado 2

Kameron Raburn, Comisionado 3

Shirley Watson, Comisionado 4

Bill Honza, Comisionado 5



ENNIS TEXAS

The bluebonnet spirit of Texas

Misión



Proporcionar servicios de calidad de forma equitativa en toda la ciudad de Bluebonnet, creando una comunidad familiar con un sentimiento compartido de pertenencia que se mantenga para disfrute de las generaciones venideras.

Visión



Ennis mantiene su ambiente e identidad de pueblo pequeño a la vez que promueve el crecimiento y el desarrollo, además de ofrecer oportunidades para que todos prosperen en una comunidad segura, inclusiva y creativa, segura, inclusiva y creativa.

Principios



Transparente y Ético

Comunicamos y desempeñamos las responsabilidades de la ciudad con integridad.
Nos comprometemos a servir con la máxima ética y profesionalidad.

Responsabilidad Financiera

Gestionamos todos los recursos confiados a nuestro cuidado en beneficio de las generaciones actuales y futuras.

Equidad e Imparcialidad

Logramos resultados equitativos recurriendo a la diversidad de la comunidad en la toma de decisiones.

Reflexivo e Innovador

Junto con nuestros socios comunitarios, fomentamos las ideas creativas y de vanguardia, y aplicamos nuevas ideas y métodos para abordar proactivamente los problemas y resolverlos en su origen.

Servicio Accesible y Compasivo

Somos un gobierno municipal abierto y receptivo, que sirve con dignidad, respeto, empatía y amabilidad.

Valoramos a Nuestros Empleados

Invertimos continuamente en el crecimiento, el desarrollo profesional y el bienestar de nuestros empleados, al tiempo que creamos un entorno diverso, cordial, solidario y productivo en el que los empleados prosperan y están comprometidos.

Fomentar la Confianza



Una Comunidad Segura y Sana



Un Estilo de Vida Vibrante



Una Economía Próspera



Servicio Público Excepcional



FOMENTAR LA CONFIANZA

Mejorar la relación entre el personal de la Ciudad y el público, proporcionando una comunicación abierta y bidireccional que cree una mayor transparencia y oportunidades para que el público participe en las actividades gubernamentales

OBJECTIVOS

- Utilizar múltiples plataformas y medios de comunicación para mejorar la comunicación con los ciudadanos.
- Crear oportunidades de comunicación más transparentes para las políticas y procedimientos del Departamento de Policía con el fin de aumentar la confianza de los ciudadanos.
- Desarrollar una estrategia de compromiso con la comunidad para promover la participación ciudadana en el gobierno local y en la comunidad.
- Prestar un servicio de atención al cliente eficaz y equitativo para mejorar la experiencia de los ciudadanos con su gobierno municipal.
- Proporcionar al público una comunicación precisa, coherente y frecuente para aumentar la transparencia y la concienciación.
- Establecer un plan de divulgación y comunicación bilingüe para comunicarnos equitativamente con nuestra comunidad.



MEDIDAS DE RENDIMIENTO

- Aumentar la frecuencia de la comunicación
- Aumentar la diversidad de los medios de comunicación
- Aumentar la tasa de compromiso a través de las actualizaciones trimestrales por correo electrónico
- Aumentar el número de voluntarios en las juntas y comisiones municipales.
- Aumentar la asistencia y la participación en organizaciones y actividades cívicas
- Aumentar el compromiso de la comunidad con el Departamento de Policía
- Aumentar el compromiso de la comunidad con el Departamento de Bomberos
- Aumentar el compromiso con la comunidad de Ennis CARES
- Aumentar el número de horas de formación del personal en atención al cliente
- Aumentar la participación en las reuniones municipales trimestrales.
- Finalizar el plan de divulgación y comunicación bilingüe antes de septiembre de 2024



Involucrar a la comunidad a través de la educación y la divulgación, invertir en programas innovadores, asociaciones comunitarias de colaboración y proporcionar los recursos necesarios para ayudar a garantizar la seguridad pública y el bienestar de los habitantes de Ennis.

OBJECTIVOS

- Invertir en personal, formación, equipamiento, tecnología y educación profesional para mejorar la prestación de servicios de seguridad pública (aplicación de códigos, bomberos, sanidad, policía, obras públicas y servicios sociales).
- Trabajar para garantizar que el personal de respuesta a emergencias esté profesionalmente formado, equipado y preparado para responder rápidamente a catástrofes y amenazas a la seguridad pública.
- Implementar servicios de seguridad pública basados en la comunidad para desarrollar una relación interactiva y comprometida con la comunidad.
- Colaborar con los socios para apoyar programas, iniciativas y servicios que promuevan la seguridad pública, la salud medioambiental, la salud física, la salud mental y la longevidad.
- Desarrollar el Centro de Servicios Comunitarios y asociarse con otros proveedores de servicios para ampliar la capacidad de programación de servicios sanitarios y humanos.

MEDIDAS DE RENDIMIENTO

- Reducción de los delitos violentos y contra la propiedad que afectan a la calidad de vida.
- Mejora en los tiempos de respuesta a las llamadas de emergencia del Departamento de Policía en comparación con la norma nacional.
- Mejora en los tiempos de respuesta a las llamadas de emergencia del Departamento de Bomberos en comparación con la norma nacional.
- Mejora en el tiempo de respuesta y procesamiento de alarmas en comparación con la norma nacional.
- Mantener la clasificación actual de protección pública ISO según lo definido por el Programa de Clasificación de Extinción de Incendios.
- Aumentar el acceso a los alimentos para los miembros de la comunidad que padecen hambre.
- Aumentar los recursos alimentarios disponibles para las personas que reúnen los requisitos.
- Aumentar anualmente el número de contactos de clientes no duplicados para personas y hogares que sufren inseguridad alimentaria.
- Aumentar el número de asociaciones que proporcionan apoyo de servicios sociales.
- Aumentar el porcentaje de eventos y programas de educación medioambiental.
- Aumentar la utilización del programa Loan-A-Tool.
- Aumentar el número de horas anuales de formación en seguridad del personal municipal.
- Reducir el número de accidentes del personal municipal con vehículos y equipos municipales.
- Aumentar el acceso a servicios de salud mental a través de organizaciones asociadas.
- Aumento porcentual de los índices de cumplimiento voluntario de las infracciones del código.
- Disminución del número de infracciones.
- Disminución del tiempo necesario para resolver una infracción del código.
- Aumentar el número de voluntarios para los días de limpieza de la aplicación del código.



Elevar las experiencias vitales en toda nuestra comunidad ofreciendo a residentes y visitantes oportunidades para disfrutar de eventos, entretenimiento, ocio, naturaleza y celebrar las diversas culturas y recursos históricos de la ciudad

OBJECTIVOS

- Ejecutar el Plan General de Mejoras de Capital (PMPC) para dotar a la comunidad de proyectos e instalaciones que mejoren nuestra calidad de vida.
- Revitalizar nuestros parques y mejorar las oportunidades recreativas aplicando el Plan Maestro de Parques.
- Apoyar los programas, servicios e instalaciones de parques y ocio garantizando un acceso equitativo para todos.
- Facilitar y promover el uso de los espacios públicos para las artes, la cultura, los festivales y los eventos especiales que hacen que la gente se sienta bienvenida y conectada con nuestra comunidad.
- Mejorar el embellecimiento, el aspecto general, y la sostenibilidad del medio ambiente de la ciudad para promover un sentimiento de orgullo por la comunidad.
- Mejorar el embellecimiento y el aspecto general de la ciudad para promover un sentimiento de orgullo por la comunidad.
- Proteger y preservar nuestro patrimonio y recursos históricos mediante un uso reflexivo del suelo, la gestión medioambiental y las prácticas sostenibles.
- Mejorar las redes de movilidad (aceras, senderos para peatones y ciclistas) para crear un Ennis más conectado que apoye estilos de vida saludables.
- Proporcionar servicios bibliotecarios accesibles, modernos y amplios para promover el aprendizaje, la alfabetización y la calidad de vida en general.
- Promover un mejor acceso a la atención sanitaria, los servicios sociales, los servicios para mayores y el transporte público para mejorar la salud y el bienestar de nuestra comunidad.



MEDIDAS DE RENDIMIENTO

- Aplicar el PIC.
- Aumento porcentual de la satisfacción de los residentes con los parques y las experiencias/opciones recreativas.
- Aumentar la participación en arte, cultura, festivales y eventos especiales.
- Aumentar el número de horas de voluntariado para los eventos de Keep Ennis Beautiful.
- Aumentar el número de voluntarios para los eventos de Keep Ennis Beautiful.
- Aumentar el número de eventos de Keep Ennis Beautiful.
- Aumentar el número de presentaciones de educación ciudadana.
- Aumentar la conectividad de senderos, aceras y paseos.
- Aumentar la satisfacción en los servicios de la biblioteca.



UNA ECONOMÍA PRÓSPERA

Expandir y hacer crecer la ciudad de forma estratégica y reflexiva para que los negocios y la industria puedan prosperar, los residentes tengan acceso a oportunidades laborales de calidad, se generen ingresos para sostener el gobierno de la ciudad y Ennis conserve su carácter e identidad de pueblo pequeño.

OBJECTIVOS

- Fomentar el desarrollo en toda la comunidad, centrándose en Bardwell Lake, el corredor Kaufman y el centro histórico.
- Implementar el Plan Maestro del Centro de la Ciudad para revitalizar el Centro Histórico.
- Promover la Ciudad y su entorno cultural y natural único y sus espectaculares flores silvestres para el turismo, eventos y actividades que sirvan como nuestra “primera impresión” con potenciales residentes, inversores y promotores.
- Promover el turismo mediante la ampliación de programas, actividades e instalaciones.
- Colaborar activamente con las Cámaras de Comercio para apoyar el crecimiento y la prosperidad de las empresas locales.
- Crear, retener y sostener el crecimiento de empresas de calidad para diversificar la economía local (desarrollo industrial, comercial, minorista y de restauración).
- Desarrollar y aplicar una estrategia de captación de empresas que genere empleos con salarios superiores a la media para los residentes de Ennis.
- Mejorar y ampliar las iniciativas de desarrollo de la mano de obra para aumentar el acceso al empleo y las oportunidades profesionales.
- Apoyar el desarrollo residencial al tiempo que se trabaja para garantizar que los nuevos barrios estén bien planificados y configurados para apoyar una calidad de vida saludable.
- Poner en marcha una estrategia de marketing que haga hincapié en nuestra “historia de marca” y nuestra “identidad de marca” para presentar la ciudad de la mejor manera posible con el fin de atraer a nuevos residentes, inversores, promotores y empresas.
- Desarrollar y aplicar un Plan de Ordenación Aeroportuaria para garantizar el mejor uso posible del aeropuerto municipal



MEDIDAS DE RENDIMIENTO

- Aumentar la renta per cápita.
- Aumentar la renta media por hogar.
- Aumentar los ingresos por impuestos sobre las ventas.
- Tendencia al alza para un equilibrio deseable del valor de la vivienda.
- Aumentar la concienciación sobre las oportunidades de empleo en toda la ciudad y sus socios.
- Aumentar el número de oportunidades de empleo en Ennis.
- Aumentar el número de nuevas empresas.
- Aumentar el número de edificios históricos renovados mediante subvenciones para la conservación histórica y la mejora de fachadas



Invertir en infraestructuras resistentes y en la prestación de servicios públicos vitales que mejoren la seguridad, la conectividad de la comunidad y la calidad de vida.

OBJECTIVOS

- Invertir en personal, formación, equipamiento, tecnología y educación profesional para mejorar la prestación de servicios públicos y mejorar el servicio al cliente.
- Invertir en toda la infraestructura crítica según el PIC para crear sistemas resistentes capaces de dar servicio a los clientes actuales y, al mismo tiempo, permitir y apoyar el nuevo crecimiento y desarrollo.
- Desarrollar y aplicar un PIC de servicios públicos basado en el Plan Maestro de Aguas
- y el Plan Maestro de Aguas Residuales para mejorar y ampliar las infraestructuras de calidad.
- Desarrollar y aplicar el Plan de Gestión de Pavimentos para orientar las futuras inversiones en mantenimiento y reparación de calles.
- Aplicar el Plan Maestro de Aguas Pluviales para orientar el desarrollo.
- Desarrollar y aplicar un plan de mejora de las aceras para mejorar la movilidad.
- Crear un centro de atención al cliente para mejorar el acceso a la información y resolver los problemas de la comunidad.



MEDIDAS DE RENDIMIENTOS

- Aumentar el número de horas de formación por empleado.
- Aumentar la asistencia a congresos anuales de asociaciones profesionales.
- Reducir el número de accidentes laborales de los empleados.
- Mantener las certificaciones exigidas a los empleados.
- Evaluar el programa de sustitución de la flota.
- Ejecutar el PIC.
- Aplicar el Plan de Gestión de Pavimentos.
- Aumentar las inspecciones in situ de los proyectos de construcción.
- Aumentar las conexiones y mejoras de las aceras.
- Aumentar el número de problemas resueltos a través del centro de atención al cliente.



¿CÓMO CONSTRUIMOS ESTE PLAN?



Interacciones en línea
con Social Pinpoint

3440



Respuestas de
la Encuesta

154



Muro de Ideas
comentarios

120



Entrevistas **12**



Grupos de Enfoque **10**



Foros Comunitarios **2**



Talleres de la Comision **2**



Reuniones de
Liderazgo de la Ciudad **10**



Publicaciones
de Redes Sociales **18**

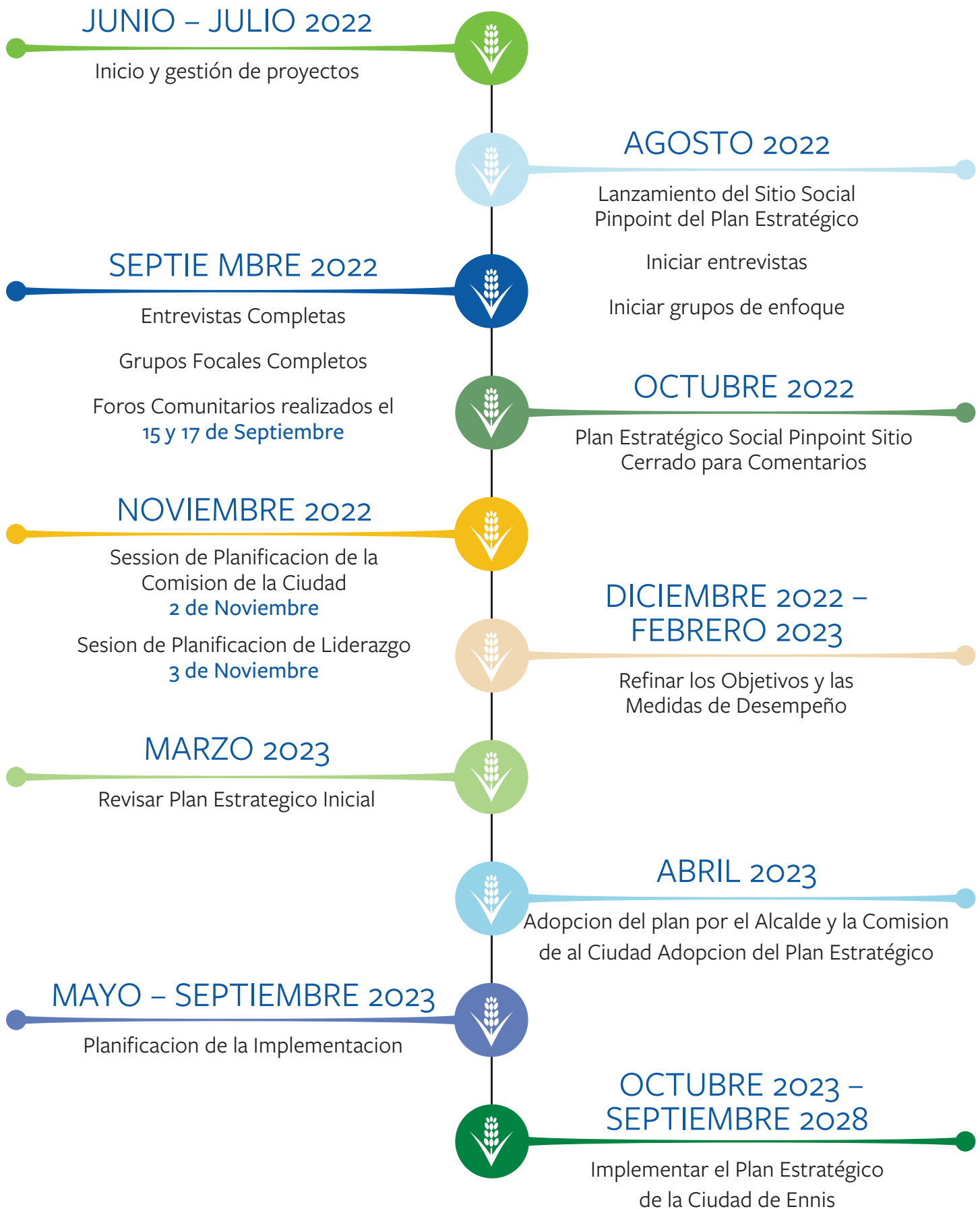


Interacciones en
las Redes Sociales **25000**



Correos Electronicos en un Boletin **500**

PROJECT TIMELINE



Poner el plan en acción

Construido para soportar los cambios de un período de cinco años sin dejar de ser relevante, este Plan Estratégico es de alto nivel. Esto significa que indica en qué se centrará la ciudad para lograr el futuro deseado para Ennis. Los departamentos de la ciudad trabajarán juntos para desarrollar planes de implementación detallados que establezcan las acciones necesarias para cumplir cada meta y objetivo estratégico.

Nos comprometemos a concentrar los recursos en las prioridades que mejor respondan a las necesidades y deseos expresados por nuestra comunidad y recogidos en este plan. A medida que las necesidades u oportunidades cambien durante la vigencia del plan, la Ciudad espera abordar cualquier cambio necesario como parte del proceso presupuestario de la Ciudad.

La ciudad también abordará los seis principios rectores identificados por la Comisión Municipal durante el proceso de planificación estratégica

Principios



Transparencia y Ética

Responsabilidad Financiera

Equidad e Imparcialidad

Imparcialidad Reflexiva e Innovadora

Servicio Accesible y Compasivo

Valoramos a Nuestros Empleados

Estos principios rectores son las expectativas sobre el modo en que la Ciudad toma decisiones y presta servicios. Los empleados aplicarán estos principios en su trabajo diario.

Seguimiento del Progreso

¿Cómo vamos? Se lo haremos saber.

El Ayuntamiento supervisará los avances hacia las metas y objetivos de nuestro Plan Estratégico e informará sobre las medidas de rendimiento. El seguimiento nos mantiene transparentes y nos obliga a rendir cuentas.

El Ayuntamiento facilitará a la comunidad un informe anual y una presentación de fin de año a la Comisión. Los miembros de la comunidad pueden

miembros de la comunidad pueden esperar para entender lo que la Ciudad está trabajando y los beneficios que se derivarán para los residentes, las empresas y la comunidad en general.

Mensual

El personal de la ciudad se reunirá y debatirá los avances en las metas y objetivos del plan estratégico.

Trimestral

El personal municipal se reunirá y debatirá los avances en las metas y objetivos del plan estratégico

Dos Veces al Año

El director Municipal presentará a la Comisión Municipal información actualizada sobre los progresos realizados en la consecución de cada prioridad y objetivo estratégicos, incluidos los éxitos y los retos.

Anualmente

El administrador municipal presentará un informe de fin de año en el que se detallarán los avances realizados en cada una de las metas y objetivos estratégicos. El informe se presentará a la Comisión y se publicará en el sitio web de la ciudad, www.ennistx.gov, para acceso de la comunidad.

Este plan estratégico es una herramienta vital que nos ayudará a servir mejor a nuestra comunidad. Se ha desarrollado mediante un esfuerzo combinado en el que han participado ciudadanos, personal municipal, cargos electos y las principales partes interesadas. Estamos agradecidos a todos los que vieron la importancia de este plan y dedicaron su tiempo en los últimos meses para darle vida. También queremos dar las gracias al equipo de consultores de BerryDunn por dirigir este proceso y proporcionarnos orientación a lo largo del mismo.

Comisión Municipal



Angeline Juenemann, Alcaldesa
Jake Holland, Alcalde Provisional
Rowdy Pruitt, Comisionado 1
Bruce Jones, Comisionado 2
Kameron Raburn Comisionado 3
Shirley Watson, Comisionado 4
Bill Honza, Comisionado 5

Personal Superior de la Ciudad

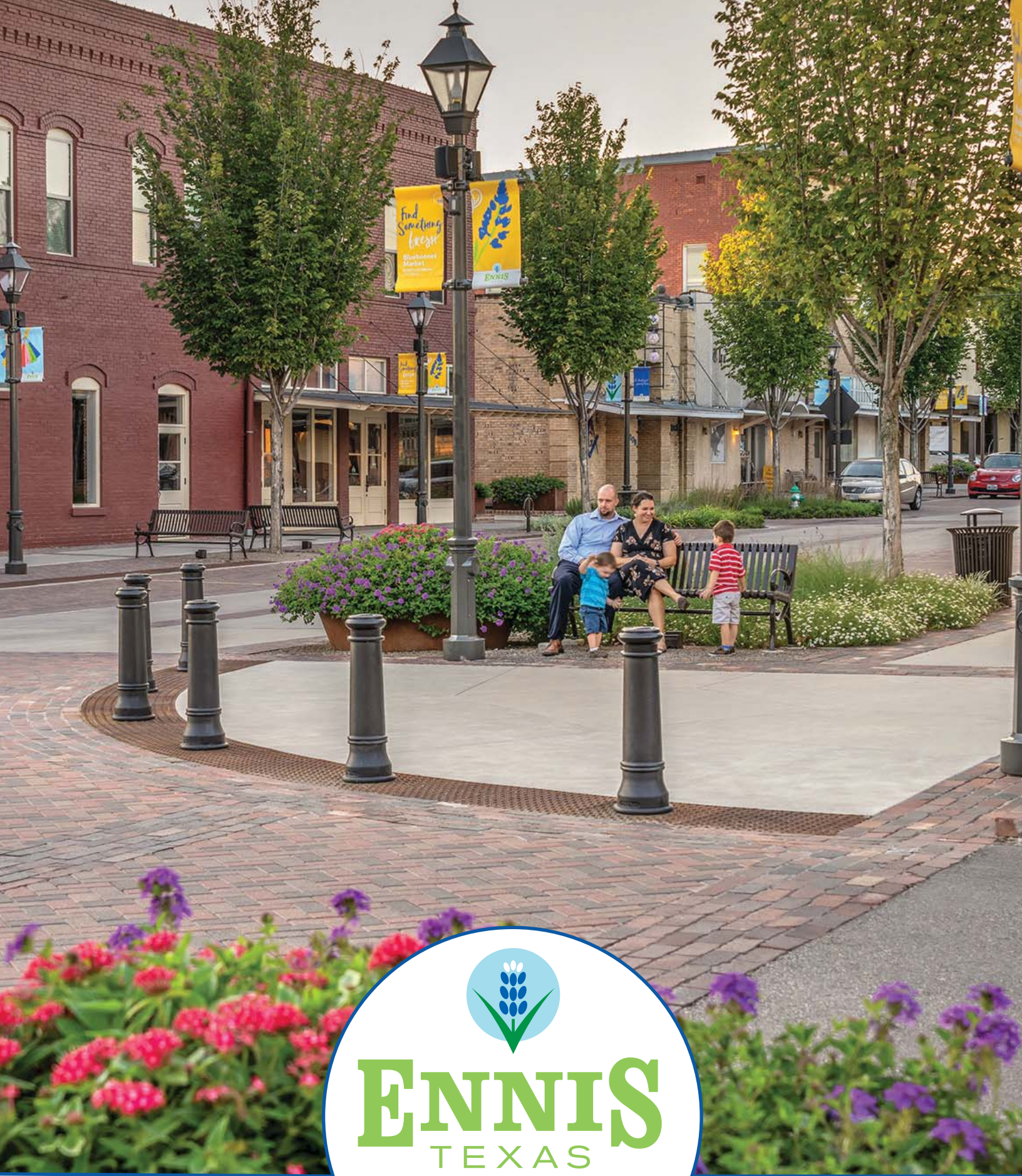


| | |
|---------------------------------------|---|
| Marty Nelson, Administrador Municipal | Irene Kasujja, Recursos Humanos |
| David Anthony, Proyectos de Inversión | Paul Liska, Parques y Recreación |
| Stephen Barnes, Finanzas | Becky McCarty, Centro y Turismo |
| Ashley Colunga, Mercadeo | Dustin Munn, Jefe de Policía |
| Jessica Diaz, Biblioteca | Mark Richardson, Planificación y Desarrollo |
| Bill Evans, Jefe de Bomberos | Angie Wade, Secretaria de la Ciudad |
| Ed Green, Trabajos Públicos | Jim Wehmeier, Desarrollo Económico |
| Kevin Howard, Salud | Chad Wester, Jefe de Bomberos |

BerryDunn Consulting Team



Seth Hedstrom, Director del Proyecto
Michelle Kennedy, Gerente de Proyecto y Facilitadora
Principal Sondra Hathaway, Facilitadora
Maddison Powers Spencer, Analista de Investigación



The bluebonnet spirit of Texas
STRATEGIC PLAN • 2023-2028



City of
New Braunfels

STRATEGIC PLAN 2024-2029



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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

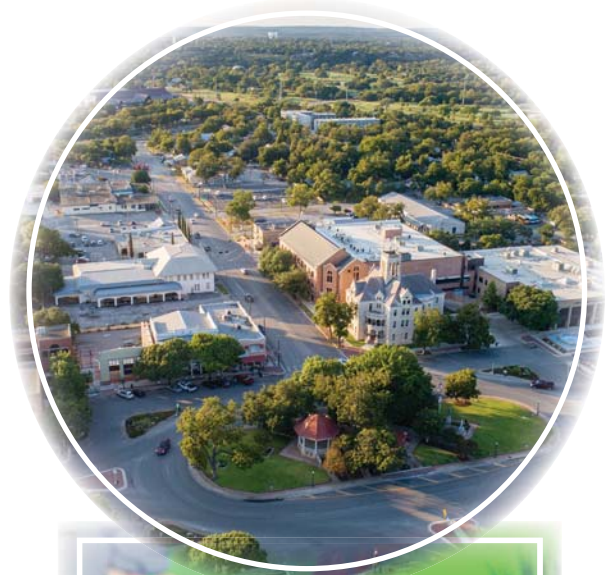
- Complete an entrepreneurship asset inventory by the end of 2025.
- In partnership with the NBEDC, establish funding source(s) dedicated to the creation of additional workforce housing units.
- Issue Notice of Funding Availability (NOFA) to explore partnership opportunities for the creation of additional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





OUR GOAL

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



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.

Organizational Excellence

Performance Measures

Milestone

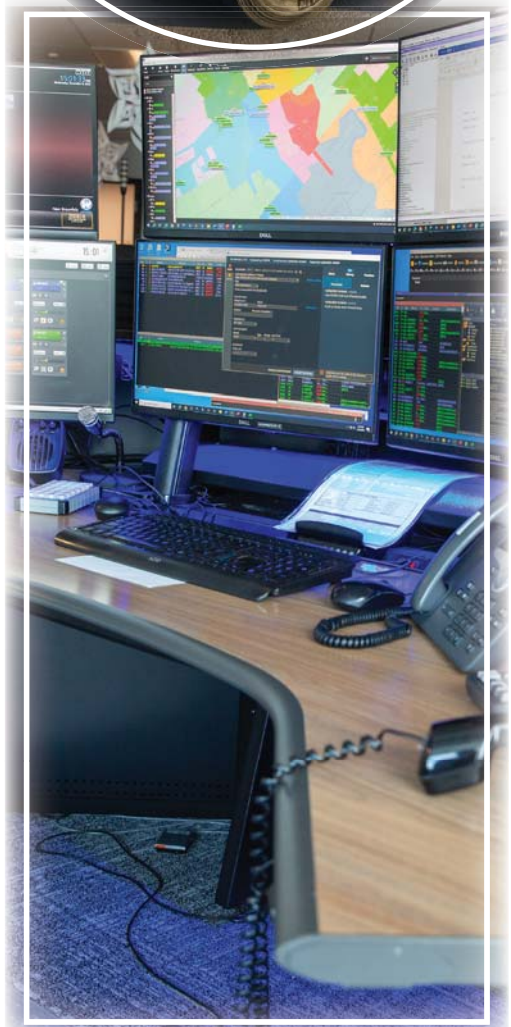
- In conjunction with department heads, Human Resources develops and submits departmental succession plans to the City Manager's Office by the end of FY 2025.
- Establish funding options and adopt a strategy for all heavy equipment assets, including fire apparatus by the end of FY 2025.
- Present updated 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 actionable 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.

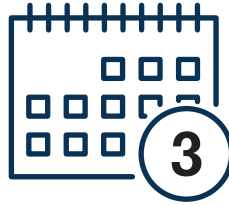
The Strategic Plan's goals and objectives will also be incorporated into the City's annual budget development process. You will see specific plan components used to guide funding decisions that drive the future of the City.



What's Next?

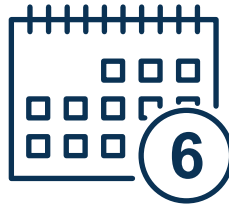
Keeping Track Of Progress

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



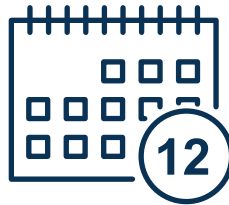
QUARTERLY

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 Miears, 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





MENIFEE

STRATEGIC PLAN
2023-2028



Who we are

Mission Statement

The City of Menifee provides essential services through teamwork, leadership, and transparency to improve the quality of life of our community.

Vision Statement

Menifee is a premier, safe, thriving, and inclusive city that offers vibrant neighborhoods and panoramic scenic vistas with a rich history, flourishing arts, cultural amenities, and diverse recreation opportunities that make Menifee a desired place to live, work, play, and stay.

Guiding Principles

People-Focused and Connected –

We create a sense of community by serving residents, businesses, employees, and visitors with compassion, kindness, and respect.

Accountable and Fiscally Responsible –

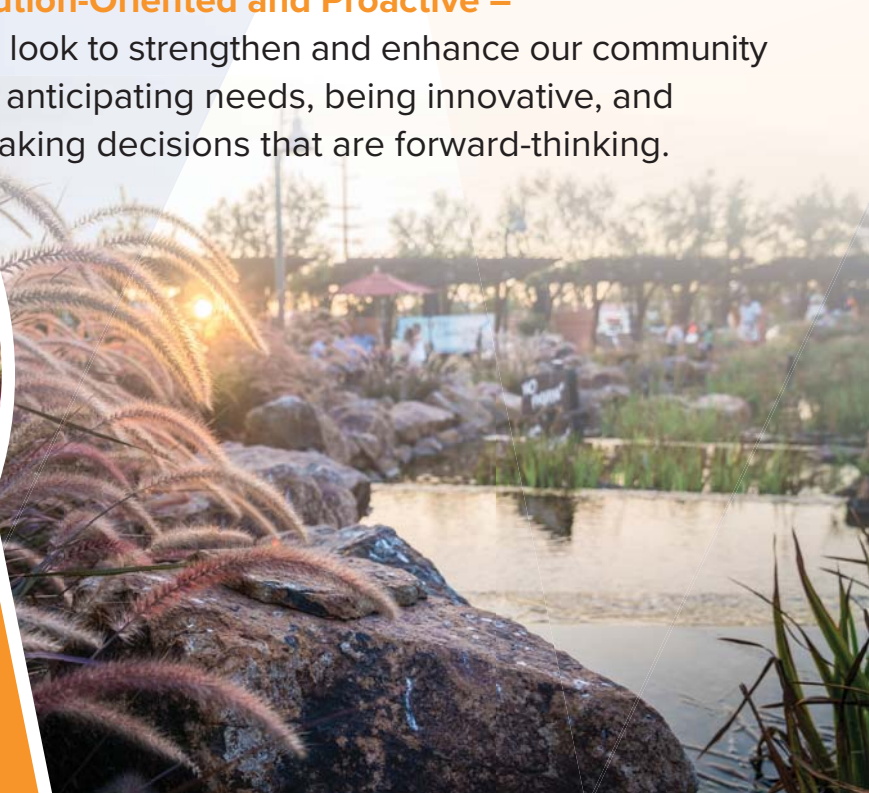
We use City resources responsibly and take actions to retain the trust of our community.

Responsive and Transparent –

We are honest, reliable, responsive, and open in our decision-making; creating environments for people to engage where all voices are heard.

Solution-Oriented and Proactive –

We look to strengthen and enhance our community by anticipating needs, being innovative, and making decisions that are forward-thinking.



Why a Strategic Plan?

Results for the Community

We know our community has big dreams for Meniffee and we want to see them come true. Meniffee's citywide Strategic Plan lays a foundation for this progress, defines our shared vision for the future and focuses City resources on five key strategic priorities: Unique Identity, Community Engagement and Social Infrastructure, Thriving Economy, Safe and Vibrant Community, and Connectivity and Mobility. 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.

What does a strategic plan do? 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.



Introduction

The City of Menifee is pleased to present the 2023-2028 Strategic Plan, setting the City's vision for the future and providing a roadmap for meeting current and future needs. Incorporated in 2008, Menifee is a rapidly growing community spanning roughly 50 square miles and home to over 116,000 residents. The Plan enables the City to balance and prioritize the needs of our community; guiding how the City's resources are allocated following the strategic priorities and objectives established for the coming five-year period. Performance measures are also incorporated into the Plan to monitor progress towards the established goals and objectives.

Residents and other City stakeholders played an important role in the Plan development by participating in interviews, focus group meetings, in-person and virtual community forums, online surveys, and council workshops. Through the collective efforts of the City Council, City staff, residents, and stakeholders, the City's vision of being a "premier, safe, thriving, and inclusive city that offers vibrant neighborhoods and panoramic scenic vistas with a rich history, flourishing arts, cultural amenities, and diverse recreation opportunities that make Menifee a desired place to live, work, play, and stay" will be realized.



Mayor
Bill Zimmerman



Mayor Pro Tem
Bob Karwin – District 1



Councilmember
Ricky Estrada
District 2



Councilmember
Lesa Sobek
District 3



Councilmember
Dean Deines
District 4

Executive Team



Armando G. Villa
City Manager



Rochelle Clayton
Assistant City Manager



Jonathan Nicks
Deputy City Manager



Jeff Melching
City Attorney



Regina Funderburk
Chief Financial Officer



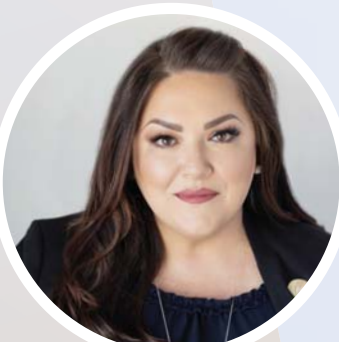
Ron Puccinelli
Chief Information
Officer



Sarah Manwaring
City Clerk



Cheryl Kitzerow
Community Development
Director



Gina Gonzales
Economic Development
Director



Lonny Olson
Fire Division Chief



Chris Karrer
Interim Chief of Police



Nick Fidler
Public Works Director

How did we build this plan? Together



2011

Direct Email Participants



1240

Online Interactions



20

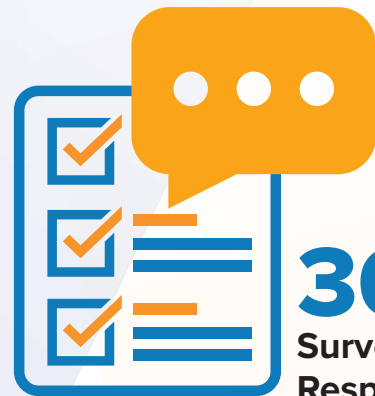
Stakeholder Interviews



5 Community Forums



7 Focus Groups



364
Survey Responses



2 Council Workshops



38,877

Meniffee Matters magazine distributed to homes and businesses



Information Provided at Community Events



Social Media Campaign

27 Posts

68,688
Engagement

Plan Development Timeline

August 2022–March 2023

August–October 2022 – Research & Planning

November–December 2022 – Community Engagement

January 2023 – Council Visioning

February 2023 – Draft Plan Review

March 2023 – Plan Adoption

Strategic Priorities



Connectivity and Mobility

Enhance
accessibility
and link the
community
with sustainable
infrastructure
to meet the
City's needs.

Objectives

- A.** Create a traffic mitigation plan to reduce congestion on Meniffee's streets and roadways.
- B.** Develop a transit mobility plan, identifying transportation options within the City.
- C.** Install fiber optic cabling and interconnect signals along major corridors to improve traffic flow.
- D.** Adopt the Complete Streets Plan to improve multi-modal infrastructure for thoroughfares throughout the City.
- E.** Begin to implement the Smart City and Broadband Master Plan to expand interconnectivity throughout Meniffee.
- F.** Work in collaboration with the County of Riverside, surrounding communities, and regional partners to assess and mitigate the impacts of growth and development outside City limits, providing for regional infrastructure development and essential services.



Connectivity and Mobility

Performance Measures

1. Maintain an average roadway Pavement Condition Index (PCI) of 70 year-over-year through June 2028.
2. Increase satisfaction with alternative modes of transportation (trails, biking, etc.) bi-annually through June 2028.
3. Increase fiber optic connectivity to traffic signals and city facilities by 5% per year through June 2028.
4. Increase grant funding for capital projects year-over-year through June 2028.



Unique Identity

Engage in thoughtful and collaborative planning with stakeholders to develop a distinct sense of place that leverages the community's historic and scenic assets and makes the City a highly attractive and desired destination for residents, businesses, and visitors.

Objectives

- A.** Conduct a place-making and tourism feasibility study as part of developing Menifee as a destination city.
- B.** Conduct a regional events assessment to identify a signature event that will help make Menifee a destination city.
- C.** Implement findings of the events assessment to develop a signature event that will help make Menifee a destination city.



Unique Identity

Performance Measures

1. Complete regional events assessment by March 2024.
2. Complete the place-making and tourism feasibility study by December 2024.
3. Hold the first annual signature event by December 2025.



Community Engagement and Social Infrastructure

Create opportunities to bring people together and enhance communication to amplify accessibility, increase awareness, and proactively deliver information to maintain quality of life and build a strong community.

Objectives

- A.** Amplify and diversify communication to enhance community awareness and understanding using print publications, electronic communications, **MENIFEE TV**, and town hall meetings.
- B.** Increase opportunities for the community to gather to support belonging and connectedness.
- C.** Create engagement opportunities to enhance understanding and participation in City planning, community events, and activities.
- D.** Develop unique park amenities, green spaces, trails, cultural and recreational facilities and programming that serves the diverse needs and desires of the community in alignment with the Parks Master Plan.



Community Engagement and Social Infrastructure

Performance Measures

1. Create a facility development plan by December 2023.
2. Initiate a comprehensive bi-annual residential satisfaction survey by December 2023.
3. Complete an assessment of the City controlled websites to evaluate usability and compliance with regulatory standards by June 2024.
4. Produce and broadcast two original content videos per month by December 2024.
5. Increase the number of residents registered to receive city alerts (e-mails and texts) by 10% by June 2028.
6. Increase social media followers by 50% by June 2028.
7. Work in collaboration with Valley-Wide Recreation and Park District (Valley-Wide) to unify the parks in Meniffee to better serve the needs of residents by June 2028.



Thriving Economy

Encourage intentional smart growth and support the City's business community so that residents have access to businesses, housing, employment, and well-paying jobs.

Objectives

- A.** Create a business incubator program/facility to support startups.
- B.** Streamline the development processes to support a business-friendly environment.
- C.** Partner with higher education institutions and other stakeholders to create workforce development programming that supports the training and education of workers and business development.
- D.** Create business incentive programs to attract and retain businesses in Menifee.
- E.** Develop a Specific Plan for the Economic Development Corridor Southern Gateway (EDC-SG) Innovation District to support the diversification of Menifee's economy.
- F.** Provide enhanced entertainment amenities to increase Menifee's commercial tax base and create an attractive environment for businesses and workers.
- G.** Create and maintain a financial sustainability plan to support city government for the long term.
- H.** Increase reserve fund balances to support the financial sustainability of city government for the long term.
- I.** Diversify revenue streams to support the financial sustainability of city government for the long term.
- J.** Implement an Enterprise Resource Planning (ERP) system to modernize and streamline City operations.
- K.** Create reports for monitoring the performance of the development departments to streamline City operations.

Performance Measures

1. Create an Incubator Feasibility Plan by December 2023.
2. Establish a Financial and Economic Sustainability Plan by December 2024.
3. Increase the number of new jobs added year-over-year.
4. Acquire facility for Business Incubator Program by December 2024.
5. Establish metrics for monitoring the performance of the development departments to streamline operations by July 2024.
6. Create an Office and Lifestyle/Retail Development Incentive Program by June 2024.
7. Create an incentive program to fast-track the development process for targeted industries by December 2024.
8. Execute Memorandums of Understanding (MOUs) with higher education institutions for strategic partnerships by December 2025.
9. Adopt the EDC-SG Innovation District Specific Plan by June 2026.
10. Complete ERP system implementation by June 2026.



Safe and Vibrant Community

Provide exceptional public safety and maintain the City's attractive look and feel so that Menifee is one of the safest cities where residents and visitors are secure in their neighborhoods and surrounding spaces.

Objectives

- A.** Enhance public safety response times to increase safety in the community.
- B.** Develop and implement a citywide safety plan to enhance security and a sense of well-being in the community.
- C.** Improve safety infrastructure and technology (e.g., street lighting, speed radar feedback signs, rapid rectangular flashing beacons at crosswalks, and surveillance systems) to enhance the sense of security and well-being in Menifee.
- D.** Continue to support ongoing professional training and development of the City's personnel to deliver high-quality services.
- E.** Create a community preparedness plan in collaboration with community partners to ensure the safety of Menifee's neighborhoods, businesses, and vulnerable places.
- F.** Make progress towards the Vision Zero goal to reduce pedestrian and bicycle fatalities.
- G.** Beautification of the streetscapes in the City's main transit corridors and gateways.



Performance Measures

1. Implement automatic aid agreements with adjoining fire departments to reduce response times by December 2023.
2. Partner with high schools to develop and implement a student public safety training program by December 2024.
3. Adopt a comprehensive citywide safety plan by June 2026.
4. Develop citywide response map with future planned development and road infrastructure improvements that guides fire service facility and resource allocations by June 2026.
5. Develop a response time matrix for the Meniffee Police Department by June 2026.
6. Develop a streetscape beautification plan to enhance the City's main transit corridors and gateways by December 2027.
7. Decrease pedestrian and bicycle fatalities in accordance with Vision Zero by 25% by June 2028.
8. Provide community cardiopulmonary resuscitation (CPR), first aid, and automated external defibrillator (AED) training as part of the Meniffee Life Saver Program to 50 people per year through June 2028.



Plan at a Glance

Mission Statement

The City of Menifee provides essential services through teamwork, leadership, and transparency to improve the quality of life of our community.

Vision Statement

Menifee is a premier, safe, thriving, and inclusive city that offers vibrant neighborhoods and panoramic scenic vistas with a rich history, flourishing arts, cultural amenities, and diverse recreation opportunities that make Menifee a desired place to live, work, play, and stay.

Guiding Principles

People-Focused and Connected –

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Accountable and Fiscally Responsible –

We use City resources responsibly and take actions to retain the trust of our community.

Responsive and Transparent –

We are honest, reliable, responsive, and open in our decision-making; creating environments for people to engage where all voices are heard.

Solution-Oriented and Proactive –

We look to strengthen and enhance our community by anticipating needs, being innovative, and making decisions that are forward-thinking.



Strategic Priorities and Goals

Connectivity and Mobility –

Enhance accessibility and link the community with sustainable infrastructure to meet the City's needs.

Unique Identity –

Engage in thoughtful and collaborative planning with stakeholders to develop a distinct sense of place that leverages the community's historic and scenic assets and makes the City a highly attractive and desired destination for residents, businesses, and visitors.

Community Engagement and Social Infrastructure –

Create opportunities to bring people together and enhance communication to amplify accessibility, increase awareness, and proactively deliver information to maintain quality of life and build a strong community.

Thriving Economy –

Encourage intentional smart growth and support the City's business community so that residents have access to businesses, housing, employment, and well-paying jobs.

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City Council

- Bill Zimmerman, Mayor
- Bob Karwin, Mayor Pro Tem District 1
- Ricky Estrada, Councilmember District 2
- Lesa Sobek, Councilmember District 3
- Dean Deines, Councilmember District 4

City Executive Team

- Armando G. Villa, City Manager
- Rochelle Clayton, Assistant City Manager
- Jonathan Nicks, Deputy City Manager
- Nick Fidler, Public Works Director
- Regina Funderburk, Chief Financial Officer
- Gina Gonzalez, Economic Development Director
- Chris Karrer, Interim Chief of Police
- Cheryl Kitzerow, Community Development Director
- Sarah Manwaring, City Clerk
- Jeff Melching, City Attorney
- Lonny Olson, Fire Division Chief
- Ron Puccinelli, Chief Information Officer

City Staff

- Robert Cardenas, Deputy Human Resources Director
- Margarita Cornejo, Deputy Finance Director
- Carlos Geronimo, Principal Engineer
- Rebekah Kramer, Assistant to the City Manager
- Daniel Padilla, Deputy Public Works Director
- Philip Southard, Public Information and Legislative Affairs Officer
- Mandy Stephens, Management Analyst

BerryDunn Consulting Team

- Seth Hedstrom, Principal
- Michelle Kennedy, Project Manager and Lead Facilitator
- Maddison Powers Spencer, Research Analyst
- Shannon Flowers, Facilitator

The Strategic Plan is the result of the combined efforts of our City's residents, elected officials, employees, and stakeholders. The City of Meniffee would like to thank all those who participated in the months-long process, providing knowledge and insights throughout the various stages of the Plan's development.



STRATEGIC PLAN 2023–2028



New. Better. Best.

www.cityofmenifee.us

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Berry, Dunn, McNeil & Parker, LLC provides staff and other administrative resources to BDMP Assurance, LLP. If engaged, BDMP Assurance, LLP will lease professional and administrative staff, both of which are employed by LLC, in performing its services. These individuals will be under the direct control and supervision of BDMP Assurance LLP, which is solely responsible for the performance of our engagement.

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