



PROJECT PLAN: Five-Year Citywide Strategic Plan

| Timeline | Project Element | Action Items/Deliverables | Cost |
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| PROJECT PLANNING | | | |
| May/June | Kick-off planning meeting with project team | <ul style="list-style-type: none"> Initial planning meeting with project team <ul style="list-style-type: none"> Review and discuss project objectives, desired timeline, and general approach Outline key stakeholders to involve in the strategic planning process Identify project team, working arrangement/tools/systems, and schedule for project check-in meetings <p>Deliverable: produce a project plan back to client with schedule for key project events, timeline for deliverables, and estimated project completion date</p> | \$2,240 |
| May/June | Review of organizational materials and resources | <ul style="list-style-type: none"> In-depth review of key organizational materials and resources: <ul style="list-style-type: none"> Previous strategic plan Planning documents and policies outlined in RFP Organization/department charts Agreements, mandates, reports Other relevant organizational data (e.g., survey data) | \$3,840 |
| Ongoing | Ongoing project management meetings | <ul style="list-style-type: none"> Regular planning/check-in meetings with project sponsors to support project management, scheduling, event coordination, and report development <ul style="list-style-type: none"> Biweekly virtual meetings Written status reports as requested by project team | \$8,320 |
| STRATEGIC PLANNING PROCESS | | | |
| Jul/Aug | Interviews with City Council Members and City Staff | <ul style="list-style-type: none"> Interviews with City Council members and City staff to establish rapport, solicit input regarding strategic priorities, and support design of City Council Session #1 <ul style="list-style-type: none"> (5) Virtual, 60-minute interviews with City Council Members and Mayor (7) Virtual, 60-minute interviews with City Manager and Executive Staff (15) Virtual, 60-minute interviews with Department Heads | \$12,400 |
| Jul/Aug/Sep | Stakeholder Outreach | <ul style="list-style-type: none"> Meeting with City's JEDI Council Meetings with community stakeholder groups Engagement with additional special project stakeholders as needed | \$8,000 |

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| Sep | Public Workshops/ Community Engagement | <ul style="list-style-type: none"> Public workshops or “pláticas” with community members to solicit input regarding strategic priorities <ul style="list-style-type: none"> Four workshops (one in each district) with bilingual facilitation (English/Spanish) and live Spanish translation services <p>Additional community meetings can be added to the scope for an additional cost: \$3,315</p> | \$13,245 |
| Sep | Community Survey | <ul style="list-style-type: none"> Community survey in multiple languages (including English, Spanish, and Filipino) to further solicit input from the community regarding strategic priorities <ul style="list-style-type: none"> To include translation services for survey and analysis of qualitative data in Spanish and Filipino <p>Please note the survey budget is based on a maximum of two open-ended questions</p> | \$10,215 |
| early Oct | City Council Workshop #1 | <ul style="list-style-type: none"> Facilitated, in-person session with City Council <ul style="list-style-type: none"> Review of community/stakeholder data and themes Review of Mission, Vision, and Values Statements SWOT analysis Strategic goal setting/prioritization <p>Outcome: establish strategic framework for 5-year plan</p> | \$7,955 |
| Oct/Nov | Staff Working Sessions | <ul style="list-style-type: none"> A series of virtual working sessions with key staff to develop strategic objectives and implementation plans to support the Council’s Strategic Framework <ul style="list-style-type: none"> Approximately 15-20 working sessions The Centre will work with project sponsors to identify relevant working groups (including SMEs, stakeholders, committee members, leaders, etc.) and schedule sessions Leads will be established for each strategic goal to support the successful development of the initial 2-year implementation plan (with timelines, performance measures/outcomes, and implications for the budget) for each strategic goal outlined in the strategic framework An emphasis will be placed on integrating existing planning documents and policies into the implementation plans and to create clear linkages within the final report The Centre will work with project sponsors to identify an effective “Strategic Planning Cycle” including timeline, process, and template for assessing the City’s overall performance within the areas outlined in the strategic plan | \$11,200 |
| Dec/Jan | Interviews with City Council Members | <ul style="list-style-type: none"> Interviews with City Council members to establish rapport with new City Council members, solicit input regarding strategic priorities, and support design of City Council Session #2 <ul style="list-style-type: none"> (5) Virtual, 60-minute interviews with City Council Members and Mayor | \$3,600 |

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| Late Jan | City Council Workshop #2 | <ul style="list-style-type: none"> Facilitated, in-person session with City Council <ul style="list-style-type: none"> Review of strategic objectives and implementation strategies to support Strategic Framework developed by the City Council Members Review of proposed timeline, process, and template for assessing the City's overall performance within the areas outlined in the strategic plan Input from City Council Members on plan elements <p>Outcome: approval of 5-year Plan</p> | \$7,315 |
| REPORT DEVELOPMENT | | | |
| February | Develop Draft Strategic Plan | <ul style="list-style-type: none"> Development of the Strategic Plan in alignment with the input and direction provided by the City Council. The plan is envisioned to include the following elements: <ul style="list-style-type: none"> Executive Summary Mission, Vision and Values Statements Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis 5 Year Strategic Plan <ul style="list-style-type: none"> City Council Goals and Objectives Strategies to Achieve the Goals and Objectives Implementation Timeline Initial Two-year Implementation Plan and Resourcing Strategy (to be developed in partnership with City staff, including the identification of lead department(s), and sources and uses of funds) Performance Measures Ongoing Strategic Planning Cycle Annual Report Template <p>Deliverable: develop draft plan to be submitted to the City for review</p> | \$8,000 |
| March | Finalize and Submit Strategic Plan | <ul style="list-style-type: none"> Finalize City's 5 Year Strategic Plan <ul style="list-style-type: none"> Refine plan to incorporate feedback <p>Deliverable: submit final plan (as a PDF and Microsoft Word document that can be edited in the future)</p> | \$1,980 |
| | Travel | <ul style="list-style-type: none"> Estimated mileage costs (per IRS 2023 rates) | \$2,000 |
| | Miscellaneous Expenses | <ul style="list-style-type: none"> Printed materials for meetings Food, is requested, for project events Additional translation services Miscellaneous additional consulting services | \$2,500 |
| TOTAL | | | \$102,810 |