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**PROPOSAL TO**  
**CITY OF GAHANNA**  
**FOR**  
**STRATEGIC PLANNING AND FACILITATION SERVICES**

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**May 8, 2015**

**Management  
Partners**





# Management Partners



May 8, 2015

Ms. Jennifer Teal  
Assistant City Administrator/Director of Finance  
City of Gahanna  
200 S. Hamilton Road  
Gahanna, OH 43230

Dear Ms. Teal:

Management Partners is pleased to provide this proposal in response to Gahanna's request for proposal for Strategic Planning and Facilitation Services. Management Partners is a professional management consulting firm specializing in helping local government organizations meet service demands, improve effectiveness and streamline operations. Our clients benefit from the expertise of professionals with extensive experience in all aspects of public management and knowledge of how the best jurisdictions in the country provide services.

Your request for strategic planning and facilitation services will add to efforts initiated in 2008 and 2012 and resulted in a vision and mission for the City. Additionally, strategic planning will provide further direction in the development of future versions of Gahanna's five-year Sustainable Operating Model. Our proposal details an approach that will complement and advance current and on-going efforts by the City to promote transparency, fiscal accountability, citizen engagement, and process improvement.

Management Partners has a proven track record of quality service to numerous local governments throughout the United States. We look forward to the opportunity to assist Gahanna leaders in preparing a strategic plan with significant public input that incorporates and links the mission, vision and objectives with a performance based implantation plan.

Please do not hesitate to call if you have any questions about Management Partners or this response.

Sincerely,

A handwritten signature in black ink, appearing to read "Gerald E. Newfarmer". The signature is fluid and cursive, with a long horizontal stroke at the end.

Gerald E. Newfarmer  
President and CEO



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## ABOUT MANAGEMENT PARTNERS

Management Partners was founded in 1994 with a specific mission to help local government leaders improve their service to the public. We are a national consulting firm headquartered in Cincinnati, Ohio, with offices in San Jose and Costa Mesa, California. We have a well-established track record of helping public sector organizations throughout the United States, including all of the services provided by cities, counties, towns and special districts at the local level.

During our 20 years of service, we have earned a national reputation by delivering quality, actionable work products to our clients. We bring extensive experience to this project, along with first-hand knowledge of local government operations. We are distinguished by the fact that each team we assign is led and staffed by associates who have actual experience in direct public service and experience working together as a team. The work we do is not an academic exercise; it is grounded in the real world of customer service and accomplishment in the public sector. As a result, we have a bias for producing value-added work for each client that will be actionable, and will be implemented.

The firm is staffed with 80 professionals who are experienced public service managers as well as qualified management consultants. This group includes generalists as well as subject-matter experts. Our consultants have years of experience working in all aspects of local government management and have built a track record of extraordinary quality service for our clients.

The firm has extensive experience helping improve both the efficiency and effectiveness of local government services. We have completed organizational staffing and improvement projects in virtually every type of local government service, including reviews of entire governments as well as selected studies of individual departments and functional activities.

Management Partners' services include everything required to support local government leaders, elected or appointed. The range of our services is illustrated in the following list:

- Strategic and Business Planning – To set the direction for the enterprise and to prepare the business plans required to continuously improve service delivery.
- Performance Management – To systematically track the performance of the enterprise, including performance management and measurement, process management, performance budgeting, employee performance evaluation, and strategic and process benchmarking.
- Organizational Analysis and Performance Assessments – Also called efficiency studies, audits, and organizational reviews, identifies improvements to an operation's efficiency and effectiveness.
- Financial Planning, Budgeting and Analysis – To manage the financial affairs of the enterprise, perform multi-year financial planning, and develop a well-structured, transparent budgeting process supported by thorough analysis.
- Process Improvement – To critically examine specific business processes by which customers are served (internal or external), to identify the opportunities for improvement, using process mapping and other tools.
- Organizational Development and Training – To help clients develop organizational capacity, a key to high performance organizations. Services include executive coaching, customer service training, employee and customer surveys and conflict management workshops.

- Sharing and Consolidation of Services – To improve the cost-effectiveness of service delivery. There are usually opportunities to partner with other units of government to combine service delivery through sharing or consolidation. Options range from the complete integration of previously separate jurisdictions to sharing or consolidating the management of individually delivered services and operations.
- Management Consulting Services – Assists government leaders by providing executive staff during transitional periods. Rather than just “treading water,” our approach combines continuation of services along with organizational effectiveness analysis to provide a solid foundation for a new permanent employee.
- Executive Recruitment – To staff the enterprise with top quality leadership, Management Partners assists clients in recruiting talent.

We have designed and led many civic engagement projects of a broad nature, often in conjunction with strategic planning projects. We are also experienced in executive management facilitation, having facilitated numerous council/board and management team workshops and meetings.

We are specialists in performance management and led the creation of the International City/County Management Association’s (ICMA) Center for Performance Measurement. In addition, we have supported many local governments (cities, counties and towns) in the design and implementation of jurisdiction-specific performance management programs. Staff development and training is always a priority, especially in the area of performance measurement, where we have trained well over 100 jurisdictions throughout North America.

Financial and business planning is an important part of our work and helping local governments address the effects of the recent recession has been an area of major emphasis. Working with cooperating local governments to identify and implement shared service delivery has also been an area of particular competence, especially in the current economic environment.

We offer a balance of perspectives with a practitioner’s bias and a proven track record of successful consulting engagements. This experience gives us a sensitivity that produces positive outcomes. Each of our projects is individually tailored to the unique needs of the client. We have a deep understanding of the service environment of local government and we are proud to say that as a result of our quality work, many of our clients ask us to complete subsequent assignments.

## PROJECT TEAM

Management Partners has a strong project team that is well-qualified to complete this work for Gahanna. This project will be a top priority for Management Partners and our team members will be available in whatever capacity and with whatever availability will contribute to the success of the project. Kevin Knutson, Regional Vice President, will serve as project director and will oversee the substantive work of the project. Amy Paul, Corporate Vice President, will serve as project manager and will be responsible for execution of the project. They will be supported by Jacquelyn McCray and Sam Lieberman.

The qualifications of each team member are briefly summarized below. Complete resumes for each person are included in Attachment A to this response.



### **Kevin Knutson, Regional Vice President**

Kevin Knutson is Regional Vice President for Management Partners' eastern office in Cincinnati, Ohio. Kevin has more than 20 years of experience in local government, including ten years in strategic planning, budget, performance measurement, and process improvement and six years in community relations, communications, and citizen engagement. He is recognized as a national expert in local government performance management, long-term financial planning, and communications. He was part of a team that implemented quality management practices in Coral Springs that led to the City being the first local government to earn the Malcolm Baldrige National Quality Award. Kevin served as interim city manager, assistant city manager, director of the office of management and budget, and director of community relations in Reno, Nevada; and as director of communications and marketing and budget and strategic planning manager for Coral Springs, Florida. He has earned the designation of Credentialed Manager from ICMA and was named the City-County Communications and Marketing Association's 2011 Communicator of the Year.

### **Amy Cohen Paul, Corporate Vice President**

Amy Paul has more than 30 years of experience in local government management, performance measurement and strategic planning. She assists public agencies in conducting organizational reviews, implementing organizational improvements, identifying alternative service delivery methods, designing and implementing performance management systems, and developing strategic and business plans. She also is a skilled facilitator and trainer. Amy was part of the original management team of the International City/County Management Association's Center for Performance Measurement and she helped produce ICMA's training materials on outcome measurement. She is the editor of the book *Managing for Tomorrow: Global Change and Local Futures*, and is the author of many articles in professional publications, including *The Municipal Year Book*.

### **Jacquelyn McCray, Ph.D., Senior Manager**

Jacquelyn McCray is a Senior Manager with extensive local government consulting experience. She is a professional planner and a certified economic development professional. She has extensive experience assisting local governments to reform and improve development review processes, organizational and workflow analyses, performance measurement, succession planning and strategic benchmarking and planning. Jacquelyn has expertise in process improvement and re-engineering of local government development review processes and procedures. She also has excellent interview and facilitation skills, and she frequently conducts employee and stakeholder focus group meetings, strategic planning sessions. Before joining Management Partners, Jacquelyn held positions as a budget analyst, project manager and land-use manager with the City of Cincinnati. She served as vice chairperson and member of the Cincinnati City Planning Commission for nine years. Jacquelyn is a member of the American Institute of Certified Planners (AICP).

### **Sam Lieberman, Management Advisor**

Sam Lieberman is responsible for conducting complex financial and operational analysis to support many different types of clients including organization reviews, process improvement studies, service sharing projects, and financial planning and budgeting studies. He has helped facilitate strategic planning and process improvement workshops, developed and analyzed strategic planning community input surveys, conducted research and analyses, assisted in the

development of performance measurement systems, and directed benchmarking research. He also collects, analyzes, and reports data for the annual Southwest Ohio Fire Benchmarking Project. Recent clients whom he has served include Berkeley, Carson, San Bernardino, Orange County, Santa Clara Valley Water District, and Zone 7 Water Agency in California; Hartford, Mansfield, and New Haven, Connecticut; Kenton County and Florence, Kentucky; Kansas City, Missouri; DeKalb County, Georgia; Pinellas County and Largo, Florida; Phoenix, Arizona; and Hamilton County, Fairfield, Mason, Montgomery, and Westerville, Ohio.

## REFERENCES

Management Partners specializes in providing quality professional consulting assistance to local government clients. Our website, [www.managementpartners.com](http://www.managementpartners.com) contains information about our clients, and you are welcome to contact any of them about the quality of our work. We believe our track record of completing similar projects on time and on budget, with quality deliverables specifically designed to be implemented, make Management Partners well qualified to execute this work for the City of Gahanna.

We are proud to have assisted a wide range of organizations with strategic planning, as illustrated by the following list of clients from the past five years.

- Alameda County City Managers Association, CA Strategic Visioning
- American Canyon, CA Long-Term Strategic Plan
- Beverly Hills, CA Strategic Policy Retreat
- Chrysalis Enterprise, Los Angeles, CA Strategic Planning Workshop
- Clayton, OH Goal Setting and Visioning
- El Cerrito, CA Strategic Plan
- Mansfield Downtown Partnership, CT Strategic Plan
- Margate, FL Strategic Plan
- Montgomery, OH Strategic Plan
- Morgantown, WV City Council Goals and Priorities
- Orange County, CA Cemetery District Strategic Plan
- Pacific Library Partnership, San Mateo, CA Strategic Plan
- Palo Alto, CA, City of Palo Alto Utilities Strategic Visioning
- Petaluma, CA Strategic Plan and Goal Setting
- Rio Rancho, NM Strategic Plan
- Riverside County, CA Fire Department Strategic Plan
- Rohnert Park, CA Strategic Plan
- Sacramento Area Council of Governments, Sacramento, CA Strategic Plan
- San Joaquin Valley, CA Library System Strategic Plan
- Santa Ana, CA Strategic and Business Planning
- Santa Barbara County Association of Governments, CA Strategic Plan
- Solano Irrigation District, Vacaville, CA Strategic Plan
- Sonoma Valley Fire and Rescue Authority, Sonoma, CA Strategic Plan
- Strategic Plan Follow up Workshop
- Tustin, CA Strategic Planning
- Ventura County, CA Strategic Planning
- Wichita, KS Strategic Planning
- Woodside, CA Strategic Alternatives Study
- Worthington, OH 360° Strategic Plan

Most recently, Management Partners completed strategic planning and facilitation with city leaders in Margate and Parkland, Florida, and in Wichita, Kansas. Our work with each of these jurisdictions is described below. You are welcome to contact any of the references we have listed above or detailed below about the quality of our strategic planning and facilitation services.

### **Parkland, Florida**

Parkland has been using strategic planning to set direction for the City and guide resource allocation and project prioritization since 2004. Management Partners assisted in improving the strategic planning process and facilitated the update for the 2015 plan. We began by streamlining the process and simplifying the structure of the document to improve its use in work planning and for communicating with the public. We conducted interviews with the City Commissioners and facilitated a management team workshop in preparation for the Commission's strategic planning workshop. We worked closely with staff to identify action plans to respond to the goals and objectives established by the Commission and worked one-on-one with department directors to develop implementation strategies.

Client Contact: Ms. Caryn Gardner-Young, City Manager  
6600 University Drive  
Parkland, FL 33067  
(954) 753-5040

### **Margate, Florida**

Management Partners' assisted the Mayor, City Commissioners and City Manager with the development of five-year Strategic Plan. The purpose of the plan was to guide and focus the allocation of resources to ensure that important projects and milestones are completed within a designated timeframe. An inclusive process of interviews, focus groups and surveys, supplemented by an assessment of current and future environmental conditions impacting the future of the City, was used to inform City leaders about trends and projections. A day-long strategic plan workshop with City Commissioners and the City's management team produced six strategic goals and priorities addressing city image and identity, community service and outreach, economic development, financial management, infrastructure and public facilities, and quality of life. The priorities were further supported by an Implementation Action Plan to assist with timely execution and performance management.

Client Contact: Mr. Douglas Smith, City Manager  
5790 Margate Boulevard  
Margate, FL 33063  
(954) 935-5300

### **Wichita, Kansas**

Management Partners facilitated a strategic planning project with the City of Wichita to develop short- and mid-term goals. Individual interviews were conducted with the Mayor, Council members and City Manager. In addition, department directors completed a survey about issues to be considered during the planning process. The results were reported in a white paper that was distributed to Council members in preparation for a workshop. Interview and survey results were used to develop a list of issues and potential goals for discussion. The first of two workshops was to identify goals and strategies. The second, several months later, was scheduled to examine how the goals aligned with the results of a large civic engagement activity undertaken by Wichita State. In addition to articulating and prioritizing goals, the workshop outcomes included discussing success factors so that Council members were in agreement about expectations and staff had a clear idea of actions to be taken.

Client Contact: Mr. Robert (Bob) Layton, City Manager  
City Hall, 455 North Main  
Wichita, KS 67202-1667  
(316) 268-4351

As requested in the RFP, we have provided the links below to several strategic plans prepared by Management Partners.

Parkland, Florida

[http://www.managementpartners.com/images/stories/pdf/Parkland\\_Strategic\\_Plan.pdf](http://www.managementpartners.com/images/stories/pdf/Parkland_Strategic_Plan.pdf)

Margate, Florida

[http://www.managementpartners.com/images/stories/pdf/Margate\\_Strategic\\_Plan.pdf](http://www.managementpartners.com/images/stories/pdf/Margate_Strategic_Plan.pdf)

Montgomery, Ohio

[http://www.managementpartners.com/images/stories/pdf/Montgomery\\_Strategic\\_Plan.pdf](http://www.managementpartners.com/images/stories/pdf/Montgomery_Strategic_Plan.pdf)

El Cerrito, California

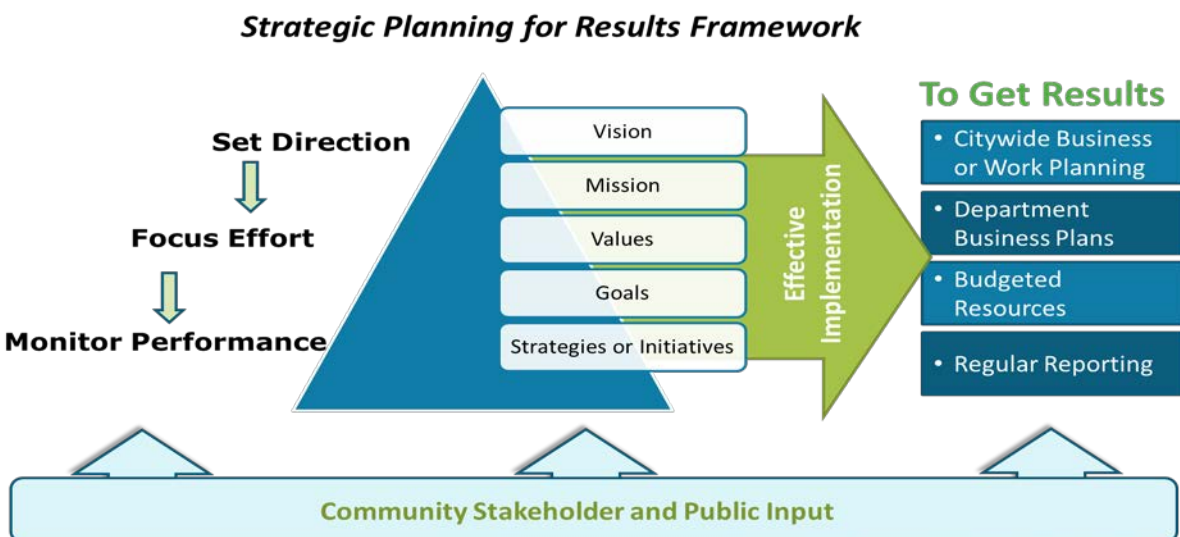
[http://www.managementpartners.com/images/stories/pdf/El\\_Cerrito\\_Strategic\\_Plan.pdf](http://www.managementpartners.com/images/stories/pdf/El_Cerrito_Strategic_Plan.pdf)

## WORK PLAN

### Strategic Planning Framework

Before we describe our proposed approach to provide Gahanna with desired results we would like to describe the elements of strategic planning that will be considered as we proceed collaboratively with your project team. Strategic planning involves establishing a vision for the future, a clear mission for the organization, articulating the organization's values, conducting a scan of the environment to identify opportunities and potential hazards and impediments that could affect the organization, establishing goals, identifying priority strategies and critical success factors, and creating implementation action plans. This framework and process will be tailored to the specific needs of Gahanna, given the current strategic planning process.

The following key components of strategic planning are provided as an overview of the elements we recommend for inclusion in the process. Our strategic planning for results framework and supporting definitions and descriptions correspond to the planning goals stated in the RFP.



A **vision** is a clear and concise statement of where the City wants to be in the future. Setting a vision is a fundamental element of the strategic planning process. All goals, objectives and strategies are directed toward achieving an established vision for the future. **Gahanna's vision** is, *"To be an innovative model community that values its rich heritage, pursues high standards, and promotes respect among its citizens."*

A **mission** statement provides the purpose of the organization and guides the prioritization of opportunities. It defines what the organization stands for and what it will do. The mission also directs the day-to-day actions of an organization and its employees. The **Gahanna mission** statement currently is, *"To ensure exceptional quality of life by providing comprehensive services, financial stability, and well-planned development, which preserves the natural environment, in order that city government will continue to be responsive, accessible and accountable to our diverse and growing community of citizens."*

**Values** are the core operating principles of an organization. Values govern the actions and behaviors of policy makers and employees to effectuate the mission and vision of the organization. Examples include professional excellence, innovation, responsiveness, leadership, teamwork and integrity.

**Goals** provide the guidance for the direction and focus of the organization, budget decisions and allocation of other resources, such as staff time. They are frequently framed for specific areas of policy interest, such as the main areas of service. Goals or strategic priorities provide the "why" (larger meaning and context) of the specific actions the agency takes. They help the executive team decide which of the many worthy projects should be done and when, within available resources. Goals must be meaningful and attainable. Goals to achieve the vision guide the development of priorities, objectives, and/or strategies and success indicators. Goals state the direction the organization will move over a period of time and state the desired outcomes to be achieved. Goals provide the "why" of the specific actions taken to achieve desired outcomes.

Gahanna uses the term "critical success factors" to refer to its strategic goals. The following five have been affirmed by the City's leaders:

- **Citizen Centricity:** *Gahanna is committed to keeping the health, safety and welfare of our citizenry as the focal point of all political decisions. Gahanna will always strive to be responsive, transparent and accountable to the community.*
- **Smart Growth:** *Gahanna is committed to effectively managing its growth and assets.*
- **Economic Success:** *Gahanna is committed to ensuring financial sustainability through smart revenue generation, business growth and prudent short and long term financial management.*
- **Effective Communication:** *Gahanna is committed to communicating critical information to our citizens, stakeholders and employees while also listening to their wants, needs and feedback.*
- **Innovation:** *Gahanna is committed to continually reinventing the way we do business to be relevant, effective and efficient.*

**Strategies or Initiatives** are the means to achieve the goals. They describe an approach or method and begin to answer the question: How will we go about accomplishing the goal? What will we actually do to realize the goals?

**Business or Work Planning** is the vehicle for implementing the results of strategic planning. While strategic planning takes the longer view (five or more years), business planning is focused on the near term, typically one or two years. It must be done on an enterprise-wide basis, with specific information about the work to be completed, including the key action steps for each initiative, specific timelines for completion and assignment of responsibility for execution. Importantly, enterprise-wide business planning must integrate all of the strategic planning initiatives with other and often existing implementation priorities that the organization has planned or scheduled to assure that the resulting business plan is comprehensive.

Once an enterprise-wide business plan has been prepared, the departments of the government can each prepare their own **department level business plans** that describe the work planned at the program and service levels during the coming one- or two-year period. As with the enterprise-wide business plan, each department business plan must integrate initiatives decided on by the organization's leaders with the other important initiatives and on-going work.

Business planning is then be integrated with the enterprise budget and with Gahanna's innovative Sustainable Operating Model so that implementation actions are aligned with revenues and expenses for a designated timeframe (usually one or two years). The budget is the vehicle used by policymakers and managers to allocate resources to accomplish the work laid out in the strategic and business plans.

**Reporting processes** are established so that policymakers and executives have current information about the progress being made to properly implement the plan. Reports must be structured to provide the information appropriate to the audience for the report (resulting usually in a tiered approach that distinguishes between enterprise-wide summaries and more specific information to inform subordinate management levels), and should contain specifics about the status of implementation in relation to the adopted plans, including performance metrics appropriate to the initiatives and programs operated by the government.

The reports can also integrate the financial reporting of the enterprise, comparing with the adopted budget. The frequency of reports is planned in advance so that all involved can plan their follow-on work appropriately. The framework is complemented by periodic community stakeholder and public input, which serves as a check and balance in the democratic exercise of strategic planning.

Management Partners is experienced using many **innovative strategic planning strategies** that produce realistic and meaningful outcomes. For example we have used focus groups and surveys to gather input and opinions from employees and the public. We have used the Search Conference/Future Search process in communities that have formed large and diverse steering committees to participate with city leaders to create a unified vision for the future. And we have used the Appreciative Inquiry technique during strategic planning processes as well. We have used client websites, wikis, and other online resources to facilitate outreach and provide information about the strategic planning process to the public.

### **Our Understanding of the Project**

Management Partners understands that the City of Gahanna desires to create a strategic plan to direct its efforts and resources toward a clearly defined vision for the future that builds on previous efforts and places a priority on public involvement in the process. The process itself should be inclusive and transparent. When completed, the plan will include overarching goals and objectives that can be used in the City's forthcoming budget development cycle, followed by the development of department level implementation plans.

Based on our experience with strategic planning and our understanding of the needs of Gahanna as outlined in the RFP we have prepared a detailed plan of work. This framework is amenable to refinement to adapt it to your specific interests.

### **Activity 1: Start Project**

Management Partners will begin the project by meeting with a representative from the City who will have responsibility for management and completion of the strategic plan. The purpose of the meeting is to finalize the work plan, schedule of meetings, and to discuss our respective roles for completing each activity. We will submit a preliminary information request identifying the pertinent documents and data we will need that provide context to the strategic planning process.

During this meeting we will establish the relationship between our associates and City staff confirm communication protocols, and clarify expectations. We will also discuss our thoughts about involving the community and stakeholders in the process and alternatives for public involvement using online tools to assure process transparency and involvement.

### **Activity 2: Identify Current and Future Concerns**

We will begin this activity by conducting individual interviews with the Mayor, City Council members, City Attorney, and department directors. The purpose of these interviews is to hear opinions and obtain insight about:

- Strengths, limitations/weaknesses, opportunities, and threats (SWOT)
- Elements that makes the City unique and special,
- Work planning and the use of performance data,
- Existing and potential partnerships,
- Customer service, and
- Ideas for public and stakeholder involvement.

Each confidential interview is individual and will be scheduled for one hour. We will also obtain input about the relevance of the vision, mission, and values, and previous strategic planning efforts and results.

In addition to conducting interviews with members of the leadership team, Management Partners will work with City to prepare an environmental scan. The environmental scan sets the framework for future internal and external conditions and identifies trends that will be important in preparing for the opportunities and challenges that the City will face in the future. Management Partners will provide examples from previous engagements and guide staff as necessary in the preparation of the internal and external components of the scan.

Data sets that are typically included in an environmental scan are:

- Financial trends and forecast,
- Economic indicators,
- Local demographic trends,
- Housing trends,
- Legislative mandates,
- Regional issues, and
- Other key issues (e.g., environmental, infrastructure, service demands).



The results of the environmental scan will be used to inform participants during the community workshops described in Activity 3.

Another key tool for identifying potential goals is the use of a resident survey. The City anticipates hiring a separate vendor to develop a scientifically valid instrument to capture community issues concerning a range of topics. We have experience working with survey firms and have assisted communities with this task in the past. We will review the prior community surveys and assist staff in determining areas of focus for data gathering.

At the conclusion of this activity, Management Partners will summarize the interview comments and SWOT information to identify key themes and determine if there are areas for further data gathering and analysis.

### **Activity 3: Conduct Community Workshops**

An important component in the development of a strategic plan is public involvement. There are many ways to gather input from members of the community. Based on the City's desire for multiple facilitated in-person sessions, we are proposing using workshops as an effective approach to hear and gather input from the public stakeholder groups.

Management Partners will conduct three workshops with various stakeholder groups. We will work with City staff to identify appropriate venue(s) for the gatherings and prepare a draft agenda for each session. We will also work with City staff to identify stakeholder groups for each session.

Following the workshops, we will prepare a summary of the results and identify key themes. This information will be included in the strategic planning briefing book described in Activity 4.

### **Activity 4: Conduct Strategic Planning Session**

During this activity Management Partners will prepare for and facilitate a strategic planning session with the Mayor and members of City Council, the City Attorney, and department directors. We anticipate that the workshop participants will convene for six to eight hours.

The purpose of the strategic planning session is to review the results of the environmental scan and community workshops, gain consensus about a vision and mission, establish goals and review and update the critical success factors and focus areas, as needed. The goals and critical success factors will help staff align service delivery efforts and work planning activities to meet near- and long-term targets.

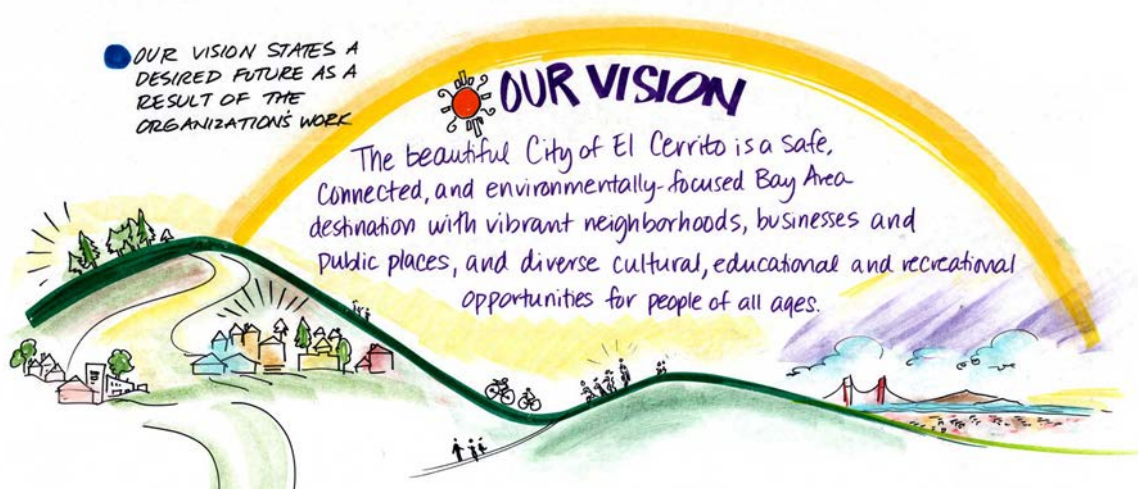
In advance of the workshop Management Partners will prepare a briefing book for participants that contains a detailed agenda. We will collaborate with City staff about the elements to be contained in the briefing book as well as the agenda. The agenda is likely to include the following components:

- Review and discuss themes from the stakeholder workshops and individual interviews (SWOT analysis);
- Review and discuss the environmental scan;
- Reach consensus on a vision and mission;
- Identify measurable goals and priorities;
- Determine critical success measures for each of the goals; and
- Decide on reporting and accountability mechanisms.



Our strategic planning workshops are engaging and interactive and are designed to ensure full participation. We will prepare briefing materials, handouts, and worksheets for use prior to and during the workshop.

In addition to providing expert facilitation, Management Partners recommends the use of a graphic recorder to create visual representations of the vision that city leaders express for the desired future for the City. The “pictures” are truly worth a thousand words when it comes to sharing the information with the entire Gahanna community. The images are part of the strategic plan and can be posted on the City’s website. Using a graphic recorder adds value to the process by developing a visual representation of the strategic planning outcomes. We can recommend a talented graphic recorder with whom we have worked in the past. An example from a recent strategic planning project in El Cerrito, California is included below.



We will synthesize the results of the strategic planning session with the SWOT analysis, environmental scan and public input of the workshop to prepare the Strategic Plan outcomes report, as discussed in Activity 5.

### **Activity 5: Prepare Strategic Plan**

Management Partners will prepare a draft Strategic Plan document that includes the results of the previous activities. It will provide guidance that will focus the efforts of department directors and resource allocation decisions in the coming years. It is also the document that will clearly communicate the future direction of the City of Gahanna on behalf of City Council and stakeholders.

The Strategic Plan, at a minimum, will contain the following components:

- Vision and mission;
- Multi-year goals;
- Priorities to achieve each goal;
- Critical success factors;
- Implementation Action Plan; and
- Reporting and accountability mechanisms.

Upon completion and delivery of the draft strategic plan, we will assist the City in hosting one or more physical or virtual open houses to share the draft plan prior to finalizing the document.

Management Partners will help staff prepare materials for the open houses. We will also provide advice on how other municipalities have planned and staffed open houses and used websites to collect community input.

At the conclusion of the review period we will incorporate changes and revisions, as appropriate, and prepare and deliver the City of Gahanna Strategic Plan in electronic format to facilitate widespread distribution and periodic review and adjustment.

### **Activity 6: Prepare Implementation Action Plan**

After completing the strategic plan document Management Partners will meet with department directors to prepare an Implementation Action Plan (IAP). The IAP is the tool that City leaders will use to chart a course of action to accomplish the goals and priorities set by the Mayor and City Council. Implementation planning specifies the actions, resources and timing required to complete each priority and track the progress of priorities that are underway.

Management Partners will facilitate a meeting with the directors to develop the IAP. Once completed, the IAP will become part of the Strategic Plan document, and the blueprint that directs future budgeting, work planning and resource allocation. Management Partners will present the completed Strategic Plan document and IAP for presentation to the City Council for adoption. We will deliver the documents in Microsoft Word and PDF formats to enable ongoing updates over time.

## HOURS, COST AND SCHEDULE

Management Partners anticipates devoting 356 hours of our staff time to execute the plan of work described above. The ultimate test of a quality project is that the client is pleased with the results, and we are committed to achieving that goal. The total cost of this project is \$62,990, which includes all fees and expenses.

A proposed schedule is included as Attachment B. We expect to refine this schedule with you during the project start-up (Activity 1) as discussed previously.

## CONCLUSION

Management Partners has the experience, the professional talent and the commitment necessary to successfully complete this work for the City of Gahanna. We welcome the opportunity to provide additional information that may be helpful. We would be pleased to assist you with this project.

## ATTACHMENT A – PROJECT TEAM RESUMES

### **KEVIN KNUTSON**

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Kevin Knutson, ICMA-CM, is Regional Vice President for Management Partners' eastern office in Cincinnati, Ohio. Kevin has more than 20 years of experience in local government, including ten years in strategic planning, budget, performance measurement, and process improvement and six years in community relations, communications, and citizen engagement.

He has served as an assistant city manager for the City of Reno, Nevada, with oversight of human resources, intergovernmental affairs, economic development, and redevelopment; as well as neighborhood services, community resources, and public information. He also served as interim city manager for the City of Reno and interim executive director of the Reno Redevelopment Agency. In September 2011 he was named "Communicator of the Year" by the City-County Communications & Marketing Association (3CMA).

He previously served as the director of the office of management and budget, where he oversaw strategic planning, budgeting, performance measurement, internal audit, community resources, and public outreach. Before that, he was the director of community relations, with responsibility for the City's communications, neighborhood services, and Reno Direct. This included responsibility for media and public relations, advertising, Reno TV, the City's website and intranet, the City's call center, neighborhood services, and the community liaison program. Prior to joining Reno, Kevin served as the director of communications and marketing for the City of Coral Springs, Florida.

For seven years, he served as the budget and strategic planning manager for Coral Springs, overseeing the award-winning strategic plan, business plan, budget, capital improvement and replacement programs, performance measurement system, process improvement program, managed competition, and elements of the City's quality initiative. He was writer and editor of the City's Baldrige and Sterling applications and has served as a Sterling Examiner. The City of Coral Springs was awarded the Florida Governor's Sterling Award for Organizational Excellence in 1997 and 2003, and was the first local government to win the Malcolm Baldrige National Quality Award in 2007.

He is recognized as a national expert in local government performance management, long-term financial planning, and communications; and has been a speaker and author on long-range financial planning and performance management for the Government Finance Officers Association (GFOA), the American Productivity and Quality Center (APQC), and 3CMA.

Kevin earned master and bachelor degrees in English from Florida International University in Miami, Florida; and has attended the Center for Creative Leadership, GFOA's Advanced Government Finance Institute, and Harvard's Kennedy School of Government executive program. He was honorably discharged from the U.S. Army, after service in Germany.

## AMY COHEN PAUL

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Amy Cohen Paul, Corporate Vice President, is a leader in local government performance measurement with 30 years of experience. Her expertise includes strategic and business planning, research and training in performance measurement and benchmarking, process improvement, total quality management, organizational development, and identifying service sharing opportunities among jurisdictions. She is also a skilled facilitator and trainer.

Amy has managed a variety of Management Partners' strategic planning, organizational review, and performance measurement and benchmarking projects. She has worked with small and large jurisdictions, as well as special districts. Among them are the cities of San Jose, Huntington Beach, La Palma, and Pittsburg, Orange County Cemetery District, and the Pacific Library Partnership and Solano Irrigation District, California; Louisville, Kentucky; the Unified Government of Wyandotte County/Kansas City, Kansas; Arlington Public Schools, Virginia; the District of Columbia; Florence, Kentucky; Rye, New York; Mansfield and Lexington, Massachusetts; Troy, Michigan; and Montgomery, Ohio.

Her focus is on identifying meaningful, results-oriented measurements and researching industry best practices. She has helped many jurisdictions with organization reviews and process improvement projects. Those include North Port, Florida; Lexington-Fayette Urban County Government, Louisville, and Kenton County, Kentucky; Howard County, Maryland; Des Moines, Iowa; the City of Rockville, and the Maryland-National Capital Park and Planning Commission, Maryland; and the Metropolitan Nashville Airport Authority.

Amy was part of the original management team of the International City/County Management Association's (ICMA) Comparative Performance Measurement Consortium. It originally was a group of about 40 large cities and counties in the U.S. and Canada, but now has grown to more than 120 jurisdictions.

Amy has designed and presented performance measurement and benchmarking training sessions for more than 75 individual jurisdictions, as well as for the ICMA University. She helped design a CD-ROM training program to help local government staff develop outcome-based indicators. She also has been active in designing and leading community workshops on performance measurement with the National Civic League.

Amy directed a three-year Leadership Development Program for the ICMA, funded by the W.K. Kellogg Foundation. She developed a multi-media training program and implementation materials for public boards, commission and committees. She also directed a two-year FutureVisions Program for the ICMA, working with 67 communities.

She is the editor of the book, *Managing for Tomorrow: Global Change and Local Futures*, and is the author of many articles in professional publications, including ICMA's *The Municipal Year Book*.

Amy earned a bachelor's degree in public communication and a master's degree in public administration from The American University.

## **JACQUELYN Y. MCCRAY, PH.D.**

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Jacquelyn McCray, Senior Manager, has more than 25 years of experience in local government management. Nine of those years were with the City of Cincinnati, where she was a budget analyst, project manager and land-use planner. Since joining Management Partners Jacquelyn has been a key staff member on myriad projects analyzing development review processes, performance measurement and organizational review. She is particularly adept at strategic planning, process improvement, benchmarking, performance management, training and development, and focus group facilitation.

Jacquelyn is a member of the American Planning Association and a certified economic development professional. She served as a member and vice chairperson of the Cincinnati City Planning Commission for nine years.

Jacquelyn has assisted organizations in future search, mission and vision setting, the identification of critical environmental indicators, and in crafting goals and objectives in the completion of strategic planning projects. Specifically she has assisted the following cities and organizations to develop strategic plans: City of Margate, Florida, City of Morgantown, West Virginia; the Mansfield Downtown Partnership, Mansfield, Connecticut; Montgomery, Ohio; the Louisville, Kentucky Health Department; the Town of Mansfield, Connecticut; Hamilton County, Ohio Department of Job and Family Services; Lake County, Illinois and The Advance, a Division of the General Board of Global Ministries of the United Methodist Church.

With Management Partners, Jacquelyn has developed refined expertise in conducting development review process analyses and improvement projects for the following clients: Saint Paul, Minnesota; Largo, Florida; the Louisville, Kentucky consolidated government; Cape Coral, Florida; Wichita, Lenexa and Olathe, Kansas; Nevada County, California; the Maryland-National Capital Park and Planning Commission; the Unified Government of Wyandotte County and Kansas City, Kansas; Lexington, Kentucky; Howard County, Maryland; North Port, Michigan; and Oklahoma City, Oklahoma;

In the area of performance measurement and management projects, Jacquelyn has assisted Westerville, Ohio; the District of Columbia; Arlington County Public Schools and Loudoun County, Virginia; the Louisville, Kentucky consolidated government; the Unified Government of Wyandotte County, Kansas; and King County, Washington. She has also conducted performance measurement training for many jurisdictions.

Jacquelyn has completed human resources benchmarking analyses for Sedgwick County, Kansas; and Loudoun County, Virginia; and she assisted with benchmarking and compensation analyses for the cities of Oakland and Santa Clara, California. She also worked with the City of Covington, Kentucky to develop a long-range financial plan.

Jacquelyn has completed organization development and improvement reviews, position analyses and service consolidation assessments for agencies across the country. Among them are Blue Ash, Montgomery and Sycamore Community Schools in Ohio; Chesapeake, Hampton and Richmond, Virginia; Berks County, Pennsylvania; Kansas City, Kansas; the Nashville (Tennessee) Airport Authority; Kenton County and the consolidated governments of Louisville and Lexington Kentucky; the City of Fort Wayne and Allen County, Indiana and Lancaster, Muhlenberg, Harrisburg and Reading, Pennsylvania.

Jacquelyn recently completed her doctoral studies at Antioch University in Leadership and Change. She also holds a bachelor's degree in urban planning and a master's degree in public administration from the University of Cincinnati.



## **SAMUEL J. LIEBERMAN**

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Sam Lieberman, Management Advisor, joined Management Partners in April 2010. Since then he has conducted complex financial and operational analyses to support a variety of assignments including organization and process improvement studies, and service sharing, financial planning, and budgeting projects. He has helped facilitate strategic planning and process improvement workshops, conducted research and analysis on staffing studies, assisted in the developing performance measurement systems, and directed benchmarking research.

During his tenure at Management Partners, Sam has assisted with the development of performance measures in Fairfield and Westerville, Ohio and manages the annual Ohio Fire Benchmarking Project. He has participated in numerous fire and police organizational assessments, most recently for Florence, Kentucky and Chatham County, Georgia. He has facilitated strategic planning efforts in Montgomery, Ohio, and Morgantown, West Virginia and has developed and analyzed strategic planning community surveys, most recently for the cities of Margate, Florida and Santa Ana, California. He has analyzed budgets and staffing for several jurisdictions and assisted with a fleet management study.

Sam has most recently helped Saint Paul, Minnesota and Aurora, Colorado improve their development review processes. Other clients he has served include the cities of Berkeley, Carson and San Bernardino, Orange County, Santa Clara Valley Water District and Zone 7 Water Agency in California; Hartford, Mansfield, and New Haven, Connecticut; Kenton County and Florence, Kentucky; Kansas City, Missouri; DeKalb County, GA; Pinellas County and Largo, FL; Phoenix, Arizona; and Hamilton County, Fairfield, Mason, Montgomery and Westerville, Ohio.

Sam gained valuable experience in the day-to-day functioning of local government during an internship with the City of Cincinnati while completing his undergraduate work. He researched the feasibility of implementing a streetcar system in Cincinnati and prepared staff reports on the subject. He also assisted with the process of rolling out and implementing CincyCare, a public/private health care partnership. As he was concluding his political science degree, Sam authored a scholarly article that assessed the accuracy of pre-primary polling in the 2008 Democratic Presidential Primary. That paper was presented during a conference of the Midwest Association for Public Opinion Research in September 2008. Sam graduated from the University of Cincinnati in 2008 with honors degrees in sociology and political science.

Prior to joining Management Partners, Sam worked in local politics. He managed a Cincinnati City Council campaign and then served as deputy finance director for a Congressional campaign.





## ATTACHMENT B – PROPOSED PROJECT SCHEDULE

| <b>Strategic Planning and Facilitation Services<br/>Gahanna OH</b> |   | Start | 2   | 3    | 4    | 5    | 6   | 7    | 8    | 9    | 10  | 11   | 12   | 13   | 14   | 15  | 16   | 17   |  |
|--|---|-------|-----|------|------|------|-----|------|------|------|-----|------|------|------|------|-----|------|------|--|
| Activity 1: Start Project  |   | 6/1   | 6/8 | 6/15 | 6/22 | 6/29 | 7/6 | 7/13 | 7/20 | 7/27 | 8/3 | 8/10 | 8/17 | 8/24 | 8/31 | 9/7 | 9/14 | 9/21 |  |
| 1.1  | Hold kickoff meeting with Mayor and project manager               |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| 1.2  | Review background documents and data                              |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| 1.3  | Establish project schedule and work plan                          |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| Activity 2: Perform SWOT Analysis and Assist with E-Scan           |   | 6/1   | 6/8 | 6/15 | 6/22 | 6/29 | 7/6 | 7/13 | 7/20 | 7/27 | 8/3 | 8/10 | 8/17 | 8/24 | 8/31 | 9/7 | 9/14 | 9/21 |  |
| 2.1  | Interview Mayor, City Council and City Attorney                   |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| 2.2  | Interview executive team  |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| 2.3  | Conduct SWOT analysis and prepare summary                         |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| 2.4  | Conduct employee focus groups                                     |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| 2.5  | Assist City staff in developing an environmental scan             |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| 2.6  | Assist City staff in preparing a community survey update          |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| Activity 3: Conduct Community Workshops                            |   | 6/1   | 6/8 | 6/15 | 6/22 | 6/29 | 7/6 | 7/13 | 7/20 | 7/27 | 8/3 | 8/10 | 8/17 | 8/24 | 8/31 | 9/7 | 9/14 | 9/21 |  |
| 3.1  | Schedule and design community workshops                           |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| 3.2  | Conduct workshops   |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| 3.3  | Summarize workshop themes   |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| 3.4  | Prepare themes document for Open Town Hall                        |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| 3.5  | Incorporate Open Town Hall comments with workshop themes          |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| 3.6  | Conduct additional data gathering as needed                       |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| Activity 4: Facilitate Strategic Planning Session                  |   | 6/1   | 6/8 | 6/15 | 6/22 | 6/29 | 7/6 | 7/13 | 7/20 | 7/27 | 8/3 | 8/10 | 8/17 | 8/24 | 8/31 | 9/7 | 9/14 | 9/21 |  |
| 4.1  | Design session agenda   |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| 4.2  | Prepare strategic planning briefing document                      |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| 4.3  | Review agenda and briefing documents with project manager         |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| 4.4  | Facilitate strategic planning session                             |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| 4.5  | Prepare strategic planning summary outcomes report                |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| Activity 5: Prepare Strategic Plan                                 |   | 6/1   | 6/8 | 6/15 | 6/22 | 6/29 | 7/6 | 7/13 | 7/20 | 7/27 | 8/3 | 8/10 | 8/17 | 8/24 | 8/31 | 9/7 | 9/14 | 9/21 |  |
| 5.1  | Prepare draft strategic plan                                      |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| 5.2  | Review draft with City project manager                            |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| 5.3  | Prepare and assist with open house to review draft strategic plan |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| 5.4  | Prepare final strategic plan                                      |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| 5.5  | Develop Mayor/ City Council presentation                          |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| 5.6  | Present strategic plan to Mayor and City Council                  |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| Activity 6: Prepare Implementation Action Plan                     |   | 6/1   | 6/8 | 6/15 | 6/22 | 6/29 | 7/6 | 7/13 | 7/20 | 7/27 | 8/3 | 8/10 | 8/17 | 8/24 | 8/31 | 9/7 | 9/14 | 9/21 |  |
| 6.1  | Facilitate work planning session with City team                   |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| 6.2  | Finalize Implementation Action Plans                              |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |
| 6.3  | Review with Mayor and project manager                             |       |     |      |      |      |     |      |      |      |     |      |      |      |      |     |      |      |  |