

RESOLUTION 755

A RESOLUTION AWARDING A BID/CONTRACT IN RESPONSE TO BID NO. 20-01 COMPREHENSIVE PLAN UPDATE TO FUTURE IQ, INC

WHEREAS, the fiscal year 2020 budget allocated funds for the Comprehensive Plan update, and;

WHEREAS, the City issued a Request for Qualifications for a consultant to facilitate an Update to the Comprehensive Plan, and;

WHEREAS, a selection committee reviewed the submissions and conducted interviews with the two most qualified bidders, and;


WHEREAS, the Committee recommends Future iQ, Inc as the best proposal for the process, and;

WHEREAS, staff has completed negotiations with Future iQ, Inc in accordance with RFQ 20-01 and the attached contract contains the agreement reached as a result of these negotiations in an amount not to exceed \$80,000.

NOW THEREFORE BE IT RESOLVED BY THE BOARD OF ALDERMEN OF THE CITY OF SMITHVILLE, MISSOURI, AS FOLLOWS:

THAT Bid No. 20-01 is hereby awarded to Future iQ, Inc, and the Mayor is hereby authorized to execute a contract in an amount not to exceed \$80,000.

PASSED AND ADOPTED by the Board of Aldermen and **APPROVED** by the Mayor of the City of Smithville, Missouri, the 3rd day of December, 2019.



Damien Boley, Mayor

ATTEST:



Linda Drummond, City Clerk

Professional Services Contract

THIS AGREEMENT/CONTRACT entered into this 3rd day of December, 2019 by and between the City of Smithville, a political subdivision in the State of Missouri (hereinafter referred to as "City" or "Owner"), and, **Future IQ, Inc.**, a Minnesota Corporation Licensed to do business in the State of Missouri as on the 4th day of December 2019 (hereinafter referred to as "Consultant").

WHEREAS, the City sent out Requests for Qualifications RFQ #20-01 Comprehensive Plan Update Consultant. Said RFQ and bidding specifications for the project which said Requests for Qualifications, and all modifications issued thereafter (if any) are attached hereto and incorporated herein by reference, as **Exhibit 1**; and

WHEREAS, Consultant delivered the detailed Response to said RFQ which is attached hereto as **Exhibit 2**; and

WHEREAS, Consultant and City further negotiated the scope of the work to be performed and the price for additional items and those changes are attached hereto as **Exhibit 3**; and

WHEREAS, the Consultant was deemed by the City the preferred Consultant; and

NOW THEREFORE, in consideration of the mutual covenants and promises contained herein the parties agree as follows:

1. CONTRACT DOCUMENTS: The Contract between the parties shall consist of this Contract, and **Exhibits 1, 2, and 3**. The Parties further agree that this Services Contract is a memorialization and a supplement to **Exhibits 1, 2 and 3** attached hereto. In the event of a conflict in the interpretation of the contract documents, the parties agree that the terms within the contract documents shall be construed or given binding effect in the following order:

- a) This Contract; and then
- b) **Exhibit 1**; and then
- c) **Exhibit 2**. and then
- d) **Exhibit 3**.

2. GENERAL SCOPE OF THE WORK: The Consultant shall supply and furnish the Insurance and all services necessary as set forth in this Contract and **Exhibits 1 and 2** attached hereto.

3. CONTRACT PRICE: Owner shall pay Consultant as follows:

- a. The total compensation for all Services, Fees and Expenses and/or under this agreement shall not exceed **Eighty Thousand Dollars (\$80,000.00)**
- b. The City will make payment subject to the terms and provisions of this contract thirty (30) business days after submission of an invoice and acceptance of the same by the City (or such other person as designated by the City) and compliance with all provisions of this contract. The Consultant shall permit the City or its agents to examine and make copies of all books and records of the

Consultant pertaining to the work, labor, and materials to be performed and furnished by the Consultant pursuant to this Agreement.

4. TIME - TERM: Time is of the essence of this contract. The work to be performed hereunder shall be performed as set forth in **Exhibits 1, 2 and 3.**

5. NOTICES Any Notice as set forth herein must be served by Federal Express or similar overnight delivery service or by certified mail, return receipt requested, addressed to the party and shall be deemed given as of the deposit in the U. S. Mails or with overnight delivery service. Notice to the City shall be sent to the City of Smithville Missouri at 107 W. Main Smithville Mo 64089. Designated City Representative is Cynthia Wagner 816-532-3897, cwagner@smithvillemo.org. Notice to Consultant shall be sent to the Consultant at P.O. Box 24687 Minneapolis MN 55424. Designated representative is David Beurle 612-757-9190. Either party may designate such other Person and/or delivery address from time to time by written Notice.

6. INDEPENDENT CONTRACTOR-INSURANCE: The Consultant warrants and represents to the City that it is fully, licensed, experienced and properly qualified as an expert to perform the services provided for herein and that it is properly equipped organized and financed to perform such services. The Consultant shall finance its own operations and shall operate as an independent Contractor and not as an agent of the City and shall indemnify and hold the City of Smithville Missouri free and harmless from all liabilities, costs and charges by reason of any act, omission or representation of the Consultant or of its subcontractors, agents, and employees, including costs and attorney's fees.

Consultant shall at all times cause all of its workers, laborers, employees, independent contractors and subcontractors and agents and employees of such persons to be fully covered with Worker's Compensation insurance at the amounts required by law and as more fully set forth in paragraph 15. The Consultant will indemnify and hold the City and the City of Smithville Missouri harmless for any and all damages and liabilities, including attorney's fees and costs for injuries to its employees, agents, servants, and/or subcontractors, for failure to obtain and maintain the statutorily required worker's compensation insurance or failure to provide a safe place to work, and Consultant will also be responsible to insure that its subcontractors carry workers compensation insurance.

The Consultant will also conduct the services in such a manner as to keep members of the public safe and represents and warrants that it has General Liability insurance in a sum no less than as set forth:

- | | | |
|----|---|--------------------------------|
| a. | Workers' Compensation: | Statutory |
| b. | Employer's Liability – | \$1,000,000.00 each employee |
| c. | General Liability – | \$2,000,000.00 each occurrence |
| d. | Property Damage -- | \$2,000,000.00 each occurrence |
| e. | Automobile Liability --Combined Single Limit (Bodily Injury and Property Damage): | |

The Consultant will provide the City with a Certificate of Insurance evidencing the same and naming the City of Smithville Missouri as "additional named insured" and will indemnify and save the City harmless from any and all liability and costs, including attorney's fees claimed by any person who claims an injury as a result of the work. All insurance coverage must be written by companies that have an A.M. Best's rating of "A-VII" or better or as specifically approved by the City and are licensed or approved by the State of Missouri to do business in Missouri.

Regardless of any approval by the City, it is the responsibility of the Consultant to maintain the required insurance coverage in force at all times; its failure to do so will not relieve it of any agreement, obligation or responsibility. In the event of the Contractor's failure to maintain the required insurance in effect, the City may order the Consultant to immediately terminate its work until the breach has been cured or terminate this Contract.

7. COMPLIANCE AND REQUIREMENTS: All work, labor and materials to be furnished and performed by the Consultant shall be to the satisfaction of the City (or such person as designated by the City) acting on behalf of the City, and payment shall be made only for such work and materials as are accepted in writing by the City (or such person as designated by the City) provided, however, that the City shall not arbitrarily withhold acceptance of such work and materials or payment so long as the Consultant makes satisfactory progress and performs all of its obligations in accordance with or pursuant to all the terms and conditions of this Agreement.

8. CORRECTION OF DEFAULTS: The Consultant will, at the request of the City (or such person as designated by the City), correct any defects to the materials or workmanship, and neither final payment by the City nor the final acceptance by the City of the work and materials shall relieve Consultant from responsibility for any defect in materials and workmanship. The Consultant further warrants to the City that all of the materials and equipment furnished pursuant to this agreement are of high quality and free from defects.

9. CLAIMS - LIENS: The Consultant shall not be entitled to any payment unless and until it provides the City with full lien waivers covering any services and/or materials provided by Consultant or any of its subcontractors. The Consultant shall indemnify and hold the City and the City of Smithville Missouri harmless including attorney's fees and costs from all liens or claims, and rights to enforce liens and to defend same against the property or the improvements arising out of any work to be performed or labor and material to be furnished under this Contract. Neither final payment by the City nor acceptance of services shall constitute a waiver of this indemnity. If any claim or lien shall at any time be filed, the Consultant shall pay to the City all monies the City may be compelled to pay in discharging the valid claim lien, including all costs and reasonable attorney's fees.

10. ASSIGNMENT: The Consultant shall not assign this Contract or any amount payable hereunder without the prior written consent of the City. The Consultant shall upon request of the City, disclose to the City the names, addresses and owners of all subcontractors or other persons with whom she intends to contract with or hereafter contracts with in connection with the performance of this Contract.

11. CONFLICTS OF INTEREST: The Consultant warrants and represents that neither the Consultant nor its agents, employees or subcontractors are related within the second degree of affinity or consanguinity with any elected officials or employees of the City.

The Consultant will not offer, give, or agree to give any employee or former employee of the City, anything of a pecuniary value for or because of:

- a. Any official action taken, or to be taken, or which could be taken; or
- b. A legal duty performed or to be performed, or which could be performed; or
- c. A legal duty violated, or to be violated, or which could be violated by such employee or former employee.

No regular employee or elected or appointed member of the City shall be permitted to obtain any benefit of this Contract, or to obtain any benefit that may accrue there from.

12. EXTRAS: No claim for payment (in excess of the amount set forth in this Contract) for extra services or materials of any kind shall be made by the Consultant or shall be paid by the City unless the same is performed or furnished pursuant to a written agreement executed by the City (in conformity with City purchasing policies) and the Contractor.

13. COMPLIANCE WITH LAW: This Contract is entered into subject to the federal, state, and local laws, charters, ordinances and regulations. The Consultant shall comply with all federal, state and local laws, ordinances and regulations and shall ensure all such compliance with regard to its subcontractors, including but not limited to the Americans with Disabilities Act and the Equal Employment Opportunity Law. Consultant shall secure all occupational and professional licenses and permits from public and private sources necessary for the performance of the services contemplated by this Contract as well as the placement and/or use of any equipment at the location specified.

14. AFFIDAVIT OF WORK AUTHORIZATION AND DOCUMENTATION: Pursuant to 285.530 RSMo, the Consultant must affirm its enrollment and participation in a federal work authorization program with respect to the employees proposed to work in connection with the services requested herein by

- submitting a completed, notarized copy of **EXHIBIT A** to this Contract AFFIDAVIT OF WORK AUTHORIZATION and
- providing documentation affirming the bidder's enrollment and participation in a federal work authorization program (see below) with respect to the employees proposed to work in connection with the services requested herein.

E-Verify is an example of a federal work authorization program. Acceptable enrollment and participation documentation consist of the following two pages of the E-Verify Memorandum of Understanding (MOU): 1) a valid, completed copy of the first page identifying the bidder and 2) a valid copy of the signature page completed and signed by the bidder, the Social Security Administration, and the Department of Homeland Security – Verification Division.

15. WORKERS COMPENSATION INSURANCE: Consultant agrees to maintain any and all statutorily required worker's compensation insurance on herself and all of its employees and to ensure that all of its subcontractors maintain statutorily required worker's compensation insurance on all of its employees. Consultant shall indemnify and hold harmless the City for any and all liability of the City (including attorney's fees) for the failure to maintain any such insurance.

16. NOT A JOINT VENTURE: Nothing contained in this Contract shall be deemed to constitute the City and the Consultant as partners in a partnership or joint venture for any purpose whatsoever.

17. NON-LIABILITY OF CITY PERSONNEL: Neither the City nor the Board of Alderpersons, Board Members, nor any other officer, official, employee, or agent of the City or the City of Smithville Missouri shall be *personally* responsible for any liability arising under or growing out of this Contract or operations of the Contractor.

18. ENTIRE CONTRACT: This Contract and the Exhibits attached hereto constitute the entire agreement between the parties. Terms not specifically set out herein and no verbal agreement or conversation with any officer, official, agent or employee of the City, either before or after the execution of the Contract, shall affect, modify or add to the terms or obligations contained in the Contract. Any such purported term, verbal agreement or conversation shall in no way be binding upon the City or the Consultant.

19. RECORDS: The Consultant shall maintain all records for inspection by City representatives during the Contract period and for three (3) years after the date of termination of the Contract. The Consultant agrees that the City and/or the City's Auditor, or any of his/her duly authorized representatives shall, until the expiration of three (3) years after final payment under this Contract, have access to and the right to examine any and all pertinent books, documents, papers and records of the Consultant involving the transactions related to this Contract.

20. WAIVER: The waiver by either party of any term, covenant, or condition hereof shall not operate as a waiver of any subsequent breach of the same or any other term. No term, covenant, or condition of this Contract can be waived except by the written consent of the City, and forbearance or indulgence by the City in any regard whatsoever shall not constitute a waiver of any term, covenant, or condition to be performed by Consultant to which the same may apply and, until complete performance by the Consultant of said term, covenant or condition, the City shall be entitled to invoke any remedy available to it under this Contract or by law despite any such forbearance or indulgence.

21. SEVERABILITY: All of the provisions of this Contract shall be severable. In the event that any provision of this Contract is found by a court of competent jurisdiction to be unconstitutional or unlawful, the remaining provisions of this Contract shall be valid unless the court finds the valid provisions of this Contract are so essentially and inseparably connected with and so dependent upon the invalid provisions that it cannot be presumed that the parties to this Contract could have included the valid provisions without invalid provisions; or unless the court finds that the valid provisions, standing alone, are incapable of being performed in accordance with the intentions of the parties.

22. UNEMPLOYMENT INSURANCE AND TAXES: The Consultant shall pay, at the its own cost, all relevant taxes in connection with the work or materials to be performed, including but not limited to State and Federal, Unemployment and old age benefit taxes, sales and use taxes, income tax, withholding tax or other work or payroll related taxes.

23. SURVIVAL OF WARRANTIES: All warranties and representations of the Consultant hereunder shall survive final payment and acceptance of the work.

24. APPLICABLE LAW: the laws of the State of Missouri shall govern this contract. Any action in regard to the consent or arising out of the terms and conditions shall be instituted and litigated in the courts of the State of Missouri, County of Clay and in no other. In accordance, the parties submit to the jurisdiction of the courts of the State of Missouri and to venue in clay County.

25. REMEDIES: In addition to all other remedies at law or in equity, if Consultant shall fail to complete and/or meet any of its obligations under the terms of this Contract, the City may, by giving the Consultant written Notice, cancel and terminate this Contract if the breach is not cured within 10 days after the sending of such Notice (unless otherwise set forth herein).

26. CONTRACT LANGUAGE The language of this Contract reflects negotiations between Consultant and the City, each of whom have had the opportunity to modify the text. In the event of litigation or other dispute concerning the language of this Contract, general rules construing ambiguities against the drafter shall not apply. It is agreed that if more than one copy of this document may be executed and that the original filed with the City shall be deemed to be the controlling original.

27. BINDING EFFECT: This Contract is binding on the parties hereto, their heirs, successors and assigns.

28. FORCE MAJEURE: In the event that either party hereto shall be delayed or hindered in or prevented from the performance of any act required hereunder by reason of failure of power, restrictive governmental laws or regulations, riots, insurrection, war, or other reason of a like nature not the fault of the party delayed in performing work or doing acts required under the terms of this Agreement, then the time allowed for performance of such act shall be extended by a period equivalent to the period of such delay.

29. INFORMATION PROVIDED: Consultant acknowledges that she has received all documents, surveys, physical characteristics necessary for the completion of this Services requested of and by Consultant.

30. DEFAULT: If Consultant fails or neglects to complete the work to be performed by the Consultant in a timely manner demonstrating quality workmanship, and should such failure or neglect continue for more than 10 days after notice is sent to the Contractor, City (1) may, but is not required to, thereafter commence and/or continue correction of such default and/or completion of the Contract without prejudice to any other remedies available to the City and may deduct from the contract sum due to the Consultant the cost of such actions or (2) City may terminate the Agreement.

31. SAFETY: Consultant shall be solely responsible for it's actions and its subcontractors' actions, procedures and activities.

32. PERMITS: If necessary, Consultant shall obtain and pay for any and all permits or other related permits, licenses and inspections necessary for the completion of the consultation services.

33. REPRESENTATIVE: Consultant shall employ a competent representative who shall be at the site during the performance of the actual work to communicate on behalf of the Consultant with the City.

34. SUBCONTRACTORS: Consultant shall require any Subcontractors, to the extent of the work to be done by such Subcontractors, to be bound by the terms of this Contract including but not limited to the requirement that said Subcontractors provide a certificate of insurance to the City. The Consultant shall be as fully responsible to the City for the acts and omissions of its subcontractors, and of persons either directly or indirectly employed by it, as Consultant is for the acts and omissions of persons it directly employs. Consultant shall cause appropriate provisions to be inserted in all subcontracts relating to this work, to bind all subcontractors to Consultant by all the terms herein set forth, and insofar as applicable to the work of subcontractors and to give Consultant the same power regarding termination of any subcontract as the City may exercise over Consultant under any provisions of this contract. Nothing contained in this contract shall create any contractual relation between the subcontractor and the City or between any subcontractors.

35. CHANGE ORDERS: Change Orders which are approved by the Consultant and the City 's designee in writing which do not increase the cost of the project may be utilized to make needed changes to the scope of the work and to manage minor changes necessary.

36. NONRESIDENT/FOREIGN CONTRACTORS. The Consultant shall procure and maintain during the life of this contract:

a. If the Consultant is a foreign corporation, a certificate of authority to transact business in the State of Missouri from the Secretary of State, unless exempt pursuant to the provisions of Section 351.570 R.S.Mo.

b. A certificate from the Missouri Director of Revenue evidencing compliance with the transient employer financial assurance law, unless exempt pursuant to the provisions of Section 285.230 RSMo.

37. TERMINATION. The City reserves the right to terminate this contract by giving at least five (5) days prior written notice to the Contractor, without prejudice to any other rights or remedies of the City should the Consultant be adjudged a bankrupt, or if Consultant should make a general assignment for the benefit of its creditors, or if a receiver should be appointed for Consultant or for any of its property, or if Consultant should persistently or repeatedly refuse or fail to supply enough properly skilled workmen or proper material, or if Consultant should refuse or fail to make prompt payment to any person supplying labor or materials for the work under the contract, or persistently disregard instructions of the City or fail to observe or perform any provisions of the contract.

38. INTELLECTUAL PROPERTY RIGHTS: Consultant shall pay any and all license, royalty or similar intellectual property fees or costs it uses for this project. Consultant shall hold City harmless and shall indemnify and defend City against any and all claims, damages, suits or losses for any and all infringements on any intellectual property rights of another (whether patents, copyrights, etc.) relating to or caused by the work of the Consultant. While Consultant will own the project of its work the City will have complete rights to use the product of Consultant in any way it deems appropriate. However, Consultant will not warrant the use of the product for any purpose other than as set forth in this agreement.

39. COMPLIANCE WITH LAW. This Agreement and the goods and services rendered herein are subject to all federal laws, the Constitution of the State of Missouri, the Revised Statutes of Missouri. Any specific provision contained herein which is contrary to federal laws or the Constitution of the State of Missouri and the Revised Statutes of Missouri shall be considered void without invalidating or otherwise affecting the remainder of the Agreement.

40. CONDITION PRECEDENT: This Contract shall be null and void and of no effect unless and until the City has by Resolution passed by the City obtained the authority to enter into this Contract and that there is a balance otherwise unencumbered to the credit of the appropriation in the City Treasury to which this contract is to be charged and cash balance otherwise unencumbered in the treasury to the credit of the fund from which payment is to be made on this contract sufficient to meet the obligation incurred and the City Treasurer has so certified.

41. EFFECTIVE DATE: The effective date of the Agreement shall be deemed to be when all of the required signatures have been executed by the City and the Consultant and the Condition Precedent set forth in preceding Paragraph has been met.

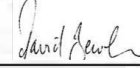
IN WITNESS WHEREOF, the parties have set their hands and seals the date and year first above written. The parties represent that the signatories below have full authority and authorization to sign on behalf of the respective parties.

THE CITY OF SMITHVILLE

By: 

Name: Damien Boley, Mayor

CONSULTANT: FutureIQ

By: 

Title CEO Future iQ

CONTRACT EXHIBIT 1

(Attach RFQ #20-01)

CONTRACT EXHIBIT A

STATE OF MINNESOTA)
) ss
COUNTY OF _____)

AFFIDAVIT

(As required by Section 285.530, Revised Statutes of Missouri)

As used in this Affidavit, the following terms shall have the following meanings:

EMPLOYEE:

Any person performing work or service of any kind or character for hire within the State of Missouri.

FEDERAL WORK AUTHORIZATION PROGRAM:

Any of the electronic verification of work authorization programs operated by the United States Department of Homeland Security or an equivalent federal work authorization program operated by the United States Department of Homeland Security to verify information of newly hired employees, under the Immigration Reform and Control Act of 1986 (IRCA), P.L. 99-603.

KNOWINGLY:

A person acts knowingly or with knowledge,

- (a) With respect to the person's conduct or to attendant circumstances when the person is aware of the nature of the person's conduct or that those circumstances exist; or
- (b) With respect to a result of the person's conduct when the person is aware that the person's conduct is practically certain to cause that result.

UNAUTHORIZED ALIEN:

An alien who does not have the legal right or authorization under federal law to work in the United States, as defined in 8 U.S.C. 1324a(h)(3).

BEFORE ME, the undersigned authority, personally appeared _____, who, being duly sworn, states on his oath or affirmation as follows:

1. My name is _____ and I am currently the President of _____

(hereinafter "Contractor"), whose business address is _____

_____, and I am authorized to make this Affidavit.

2. I am of sound mind and capable of making this Affidavit and am personally acquainted with the facts stated herein.

3. Consultant is enrolled in and participates in a federal work authorization

program with respect to the employees working in connection with the following services contracted between Consultant and the City of Smithville Missouri.

4. Consultant does not knowingly employ any person who is an unauthorized alien in connection with the contracted services set forth above.

5. Attached hereto is documentation affirming Contractor's enrollment and participation in a federal work authorization program with respect to the employees working in connection with the contracted services.

Further, Affiant saith not.

[SIGNATURE]

[Printed name], Affiant

Subscribed and sworn to before me this _____ day of _____, 2019.

Notary Public

My Commission Expires: State of
Minnesota
Commissioned in _____ County
Commission # _____

PLEASE NOTE:

Acceptable enrollment and participation documentation consist of the following 2 pages of the E-Verify Memorandum of Understanding:

1. A valid, completed copy of the first page identifying the Contractor; and
2. A valid copy of the signature page completed and signed by the Contractor, and the Department of Homeland Security - Verification Division



RFQ #20-01 COMPREHENSIVE PLAN UPDATE CONSULTANT

THE CITY OF SMITHVILLE REQUESTS FOR QUALIFICATIONS FOR THE FOLLOWING PROFESSIONAL SERVICE:

Sealed Proposals for Qualifications from qualified firms to modify the City's 2005 Comprehensive Plan in response to changes that have occurred since approval of the plan will be received by the City of Smithville, Missouri, at City Hall, 107 W. Main Street, Smithville, MO 64089, until 2:00 P.M. October 22nd, 2019. The Project consists of the following:

SCOPE OF SERVICES

The following list represents topics to be included in the Comprehensive Plan; however, we understand the final scope of services will be the result of negotiations between the City and the successful consultant:

- Review the existing 2005 Comprehensive Plan for Adequacy
- Community Meetings and Summary Report of Community Input
- Review of Community Goals
- Project Future Trends
- Review & Revise the Future Land Use Plan
- Action Plan for Implementation
- Implementation Strategy and Matrix
- Major Street and Trails Plan*

*Represents an alternate addendum to the Base proposal and should be separately identified in the proposal as to schedule, scope of services, and personnel.

BACKGROUND

The current Comprehensive Plan was prepared in 2005 by Patti Banks Associates. This plan and other related documents are available for review on the city's website at <https://www.smithvillemo.org/files/documents/2005ComprehensivePlan1313042221112117PM.pdf>. Since adoption of the 2005 Comprehensive Plan, the housing market significantly changed as a result of the economic downturn. While the residential market slowed significantly from 2008 to 2012, it has increased significantly in recent years. The City has an abundance of vacant land, but there are limited lots remaining and available for construction this year. This pressure has brought two new subdivisions in for approval and in recent months, commercial development has started in earnest in Smithville. Also, a new elementary school has been constructed and opened, a new capital improvement sales tax and bond package was approved by voters, and several million dollars of public infrastructure investment has occurred.

Location – Smithville, with a population of 10,249, is situated just 20 miles from downtown Kansas City. Smithville Lake is a 7,200-acre Corps of Engineers project with 175 miles of coastline and three Clay County Parks, including 36 holes of golf, as well as the city's 260-acre Smith's Fork Park. Historic Downtown Smithville recently received a streetscape facelift to help revitalize the historic

core, and the final connection to Smithville Lake will occur with a new 1.6-mile hike and bike trail from downtown to Smith's Fork Park to be completed in the spring of 2020.

Education – The Smithville School district is an accredited, highly ranked educational system with 2,644 students from 67 square miles of area encompassing portions of Clay, Platte and Clinton Counties. The Smithville R-II School District is comprised of three elementary schools, one middle school, and one high school all collectively demonstrating one community full of Warrior Pride.

Parks & Recreation – Smith's Fork Park is a 260-acre park that includes baseball and soccer fields, a golf driving range and skate park, several trails around a secondary Lake Remote, as well as a campground that offers full hook ups including water, sewer and 50-amp power. Heritage Park is located adjacent to downtown and includes several baseball fields, a new playground and a half-mile walking trail. There are several neighborhood parks throughout the City and trail connections are continuing to be designed. The City has begun in earnest its own recreation program that offers baseball, softball, soccer, volleyball and various children's activities. Courtyard Park, located in historic downtown is the site of many of the activities provided for recreation and is host to the Farmer's Market, as well as several festivals, parades and a BBQ contest.

The City will conduct ONE pre-submission question and answer period for any and all interested consultants on October 2nd, 2019 at 2:00 P.M.

The Proposal should contain no dollar costs, but should address the following:

The comprehensive plan is intended to provide an overview of the City at the present time and to utilize and capitalize on the currently concluding Community Strategic Planning process. <http://lab.future-iq.com/city-of-smithville/> Recommendations from this plan are slated to be presented to the Governing Body on October 15, 2019. As that process completes, this Comprehensive Plan process will begin, being the first implementation of the new Strategic Plan. It is our goal that this Comprehensive Plan Update will include an assessment of the City's current condition, summary of the goals of our residents & businesses, project future growth & related development issues and propose policies, initiatives & tasks necessary to accomplish the planning goals of the community. The comprehensive planning process shall include a significant community input component.

Work is expected to begin January 2020. The finished product should be ready for adoption by the Planning Commission and Board of Aldermen before the end of 2020.

RFQ submittals shall include the following sections:

1. Cover Sheet;
2. Summary/Brief History of the Firm;
3. Understanding of the Scope of Services;
4. Description of the applicant's approach to the project;
5. Resumes of key personnel who will work on the project;
6. Descriptions of recent, similar projects with client contact information;
7. Estimated tasks and timeframe for project phases.

INSTRUCTIONS TO BIDDERS

1. RFQs must be addressed to "Bid 20-01 – Comprehensive Plan RFQ", 107 W. Main Street, Smithville, Missouri 64089, and be received before 2:00 P.M. on the date of closing.
2. Responses and anything pertaining to the RFQ should be in a sealed envelope. It is preferred that the PROPOSAL RESPONSE FORM in this RFQ be used. All RFQs must be sealed and marked on the outer envelope by RFQ number and date of closing. Firms shall submit three

(3) paper copies and one (1) PDF copy on a CD or USB of their Qualifications. The only information we will read at the closing will be the vendors, contractors, or proposers who responded. The closing is at 2:00 P.M. on the 22nd day of October, 2019, at City Hall.

3. Disabled persons wishing to participate in the RFQ closing and who require a reasonable accommodation may call the City at (816) 532-3897. A forty-eight-hour notice is required.
4. Any questions regarding this RFQ should be directed to Jack Hendrix, Development Director, 107 W. Main Street, Smithville, Missouri 64089; (816) 532-3897.

THE CITY OF SMITHVILLE RESERVES THE RIGHT TO REJECT ANY OR ALL PROPOSALS.


Finance Director

Issued: the 19th day of September, 2019

**CITY OF SMITHVILLE REQUEST FOR WRITTEN QUOTATIONS
GENERAL INSTRUCTIONS AND CONDITIONS**

1. Written quotations, subject to the conditions listed below and any special conditions set forth in the attached specific Proposal, will be received by the City of Smithville, 107 W. Main Street, Smithville, Missouri 64089, until the closing.
2. The City reserves the right to accept or reject any and all proposals and/or alternatives and to waive technicalities, and to accept the offer that the City considers to be the most advantageous.
3. Vendors, contractors or proposers should use the forms provided for the purpose of submitting quotes and if applicable should give the unit price, extend totals, and sign the quote as required in each specific instance.
4. If applicable identify the item you will furnish by brand or manufacturer's name and catalog numbers, as applicable. Also furnish all specifications and descriptive literature.
5. Whenever products or materials of any particular producer or manufacturer are mentioned in our specifications, they are intended to be descriptive of type or quality and not restrictive to those particular items mentioned.
6. The City of Smithville is exempt from payment of Missouri Sales and Use Tax in accordance with Section 144.010 et seq. R.S.MO 1969 and is exempt from payment of Federal Excise Taxes in accordance with Title 26 United States Code, Annotated.
7. The delivery date(s) or dates when work will start shall be stated in definite terms, as they will be taken into consideration when making the award.
8. The City reserves the right to cancel all or any part of any order(s) if delivery and/or service is not made or work is not started as guaranteed.
9. If applicable, prices must be stated in the units of quantity specified, if applicable, in the Proposal and must be firm. Quotes qualified by escalator clauses may not be considered.
10. If this RFQ involves the design of a Public Works project and Vendor; Contractor or Proposer must comply with all of the requirements applicable to Public Works Projects under Missouri Law.
11. Any questions regarding this request may be addressed to Daniel Toleikis, Finance Director, 107 W. Main Street, Smithville, Missouri 64089, (816) 532-3897.
12. The Contractor must affirm its enrollment and participation in a federal work authorization program with respect to the employees proposed to work in connection with the services requested herein Pursuant to 285.530 RSMo.

RFQ #20-01 COMPREHENSIVE PLAN UPDATE CONSULTANT

ARTICLE I GENERAL INFORMATION

1. The Board of Aldermen of the City of Smithville, Missouri ("City") invites you to submit a written Statement of Qualifications to provide consulting as follows:

- Review the existing 2005 Comprehensive Plan for Adequacy
- Community Meetings and Summary Report of Community Input
- Review of Community Goals
- Project Future Trends
- Review & Revise the Future Land Use Plan
- Action Plan for Implementation
- Implementation Strategy and Matrix
- Major Street and Trails Plan*

*Represents an alternate addendum to the Base proposal and should be separately identified in the proposal as to schedule, scope of services and personnel.

2. The term "RFQ" means this Request for Qualifications; the term "Contractor", "Offeror", "Vendor", "Bidder", "Consultant" or "Proposer" refers to one who submits a proposal in response to the RFQ; and the term "Proposal" means the proposal of the Contractor, Offeror, Vendor, Bidder, or Proposer.
3. By submitting a Proposal, the Vendor agrees, to negotiate in good faith for such reasonable fees as is required to complete the project and if its proposal is accepted, to perform the Service described in this RFQ in accordance with the terms and conditions contained herein, at the prices set forth in its Proposal.
4. Note: The Vendor is presumed to accept the RFQ requirements. The Vendor must raise any questions regarding the RFQ requirements no later than three (3) days prior to the Closing Date. In addition, the Vendor must list and outline, in their Proposal, any exceptions to the RFQ requirements and Contract requirements. The timeliness, nature and number of the exceptions taken by the Vendor are among the factors that the City will consider in selecting the successful Vendor.

All provisions, instructions and conditions set forth in this RFQ apply jointly and severally to each alternative whether Vendor submits a bid for both or only one of the Alternatives set forth above.

5. Additional information and/or questions relating to this RFQ can be obtained by contacting Daniel Toleikis, Finance Director, 107 W. Main Street, Smithville, Missouri 64089; (816) 532-3897.

ARTICLE II PROPOSAL INSTRUCTIONS

RFQ PROPOSALS - CONTENTS AND SUBMISSION

Proposals in response to this RFQ should include the following information:

1. Name, address, and telephone number of Proposer(s).
2. In a separate, sealed envelope, the hourly rate(s) of each member or employee anticipated to provide services in accordance with the RFQ, as well as an anticipated scope of work for each task to provide the City the ability to adjust the scope of work to meet the anticipated budgeted amounts. They actual budget for this project and the overall scope of any contract is subject to Board of Aldermen approval. Specify the required information for the base bid and each alternate for which a bid is being submitted.
3. A completed Proposal Form attached to this Request for Qualifications (preferred, not required). Three (3) paper copies and one (1) PDF copy on a CD or USB must be received before 2:00 P.M. local time on October 22nd, 2019.
4. Proposed date for commencement of services.

SUBMITTAL:

The submittal should be organized in a manner that will convey all pertinent information. All submittals shall be organized in the following order, with listed requirements for each tab:

Tab A: Statement of Qualifications (SOQ) and relevant experience of your Project Manager and Key Task leaders assigned to the project. The statement of qualifications shall be limited to five (5) pages, single sided, using a 12-pitch font size.

Tab B: Client or project references for at least three similar type and scope projects that demonstrate the applicants' ability to perform this work.

Tab C: (Separate Sealed Envelope Required) Anticipated Schedule and Budget needed to complete the proposed scope or work, including the major project items schedule, and hourly rates for each employee performing tasks.

The City is not responsible for any costs incurred in preparing or submitting a response to this RFQ.

Submittals that do not meet the requirements outlined in the RFQ may be deemed non-responsive by the City; and, the City reserves the right to waive any and all requirements in this RFQ.

There will be a pre-submission meeting on October 2nd, 2019 at 2:00 P.M. Any questions regarding this RFQ, preferably, should be directed to Jack Hendrix, Development Director, either by phone at (816) 532-3897 or email at jhendrix@smithvillemo.org, prior to the pre-submission meeting. The last day for questions from prospective responders will be 5:00 PM on October 18th, 2019.

EVALUATION:

The City will evaluate the responses to this RFQ relative to the Selection Criteria outlined below. The successful consultant will be the responsible offeror whose SOQ is determined to be the most advantageous considering the evaluation factors included in this RFQ. The successful consultant may be selected by the City at its sole discretion based exclusively on review of the submitted SOQ. At the City's sole discretion, a shortlist of two or more consultants may be requested to develop detailed proposals and/or interview prior to selection, augmenting the information provided in the SOQ.

After determining the most qualified respondent, the City will attempt to negotiate a contract. If the City is unable to negotiate a contract with the selected firm(s), the City will, in writing, end negotiations with that firm and proceed to the next firm in the order of the selection ranking until a contract is reached or all firms are rejected.

All SOQs will be evaluated in terms of the following scoring criteria. The relative weight of each selection criterion is provided in parentheses.

Project Manager Experience in terms of delivering projects of this nature and magnitude. (40%)

Key Staff Experience (35%)

Client and/or project references for at least the three most recent projects of similar character that demonstrate the PM and Key Staff experience to perform this project work. (20%)

Missouri Businesses and/or Disabled-Veterans in accordance with 34.073 and 34.074 R.S.Mo. (5%)

ADDENDA

All changes, additions, and/or clarifications in connection with this RFQ will be issued by the City Finance Director in the form of a written addendum. Signed acknowledgement of receipt of each addendum must be submitted with the Proposal to this RFQ. Verbal responses and/or representations shall not be binding.

AWARD OF THE CONTRACT

After the RFQs have been opened and duly considered, the lowest and/or best proposal to the RFQ shall be submitted to the City Board of Aldermen for formal approval. After approval by the City Board of Aldermen, the City Clerk will notify, in writing, the successful Proposer. An approved Resolution by the City Board of Aldermen shall constitute the City's official award of the RFQ. A written contract noting the terms and conditions of this RFQ will be executed before "Notice to Proceed" is given. Vendors with standardized contracts should submit them with the Proposal.

HOLD HARMLESS CLAUSE

The Vendor awarded the contract from this RFQ agrees to save and hold harmless the City and its agents, servants, and employees of, and from, any and all liabilities, expenses, causes of action, damages and attorney's fees resulting, or to result, from any of the Vendor's businesses or operations resulting from any act or omission of the Vendor's agents, servants or employees.

OFFICIALS NOT TO BENEFIT

No regular employee or elected or appointed member of the City government or their immediate family shall benefit from or be a part of and/or share any or part of this contract, or to any benefit

that may arise there from without notifying the City in the Response to the RFQ that a regular employee or elected or appointed member of the City government or their immediate family may benefit under the contract. No such identified regular employee or elected or appointed member of the City government shall participate in any decision, approval, disapproval, recommendation, or preparation of any part of a contract awarded pursuant to this RFQ.

GRATUITIES ILLEGAL TO ANY EMPLOYEE AND FORMER EMPLOYEES

It is unlawful for any person or business to offer, give or agree to give, to any employee of the City, or former employee of the City, to solicit, demand, accept or agree to accept from another person or business, a gratuity, offer of employment or anything of pecuniary value in connection with any decision, approval, disapproval, recommendation, or preparation of any part of a contract requirement or a purchase request, influencing the content of any specification or procurement standard, rendering the advice, investigation, auditing, or in any other advisory capacity in any proceeding or application, request for ruling, determination, claim or controversy, or other particular matter, pertaining to any contract or subcontract, or to any RFQ thereof.

CO-PARTNERSHIP DISCLAIMER

It is mutually understood that nothing in this Request for Qualifications or subsequent contractual agreements is intended, or shall be construed, as in any way creating or establishing the relationship or co-partners between the parties; or as constituting the contractor as an agent or representative of the City for any purpose, or in any manner whatsoever.

NON-DISCRIMINATION IN EMPLOYMENT

Contract for Service under this RFQ obligates the Proposer not to discriminate in employment practices. Successful Proposer must be prepared to comply in all respects with all provisions regarding non-discrimination.

KICKBACKS ILLEGAL IN SUBCONTRACTING

It is unlawful for any payment, gratuity or benefit to be made by, on behalf of, or solicited from, a subcontractor under a contract to the prime contractor, or higher tier subcontractor, or any person associated therewith, as an inducement for the award of a subcontract to a contract of the City. Upon showing that a subcontractor made a kickback to a prime contractor, or a higher tier subcontractor in connection with the award of a subcontract or order there under, it shall be conclusively presumed that the amount thereof was included in the price of the subcontract, or order, and ultimately borne by the City, and will be recoverable hereunder from the recipient. In addition, that amount may also be recovered from the subcontractor making such kickbacks. Recovery from one offending party shall not preclude recovery from other offending parties.

ARTICLE III GENERAL TERMS AND CONDITIONS

OVERALL REQUIREMENTS

Contract shall be governed by the laws of the State of Missouri. In the event of any litigation arising hereunder, venue shall be properly laid only in the State Circuit Court for Clay County, Missouri

The City shall not be obligated for any amounts in excess of the contract and/or RFQ response (bid) unless approved in advance by the City in writing.

The Contract is binding upon the parties, their partners, heirs, successors, assigns and legal representatives.

The Contractor and its subcontractors are independent contractors and are not the employees or agents of the City. Neither the Contractor nor any of its subcontractors shall represent to any person, firm, or corporation that it is an employee or agent of the City and neither shall have the right, authority or power to make or assume any obligation of any kind on behalf of the City or to bind the City in any manner.

The Contractor is prohibited from assigning, transferring, conveying, subletting, or otherwise disposing of this Contract, or any resultant agreement or its rights, title, or interest therein, or its power to execute such agreement, to any other person, company, or corporation, without the previous written approval of the City.

If provided, the Contractor shall return all keys, code cards, unused supplies, other project-related materials, and any other City property to the City upon completion of the contract.

Any contract let in response to this RFQ shall be deemed to incorporate all applicable Missouri Laws and regulations, including but not limited to those set forth in the Laws Section of this RFQ.

CONFIDENTIALITY

All reports, documents and material developed or acquired by the contractor, as a direct requirement specified in the contract, shall become the property of the City. The contractor shall agree and understand that all discussions with the contractor and all information gained by the contractor as a result of the contractor's performance under the contract shall be confidential and that no reports, documentation, or material prepared as required by the contract shall be released to the public without the prior written consent of the City.

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

**RFQ #20-01 COMPREHENSIVE PLAN UPDATE CONSULTANT PROPOSAL RESPONSE
FORM**

I, _____, hereby representing
(Agent Submitting RFQ)

_____, have read and reviewed the attached specifications.
(Firm or Company)

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

Company Name

Authorized Person (Print)

Address

Signature

City/State/Zip

Title

Telephone

Date

Tax ID No.

E-Mail Address

Attach additional sheets/envelopes for each:

Tab A

Tab B

Tab C

CONTRACT EXHIBIT 2

(Attach **Future iQ, Inc.**'s response to RFQ #20-01)

PROPOSAL COVER SHEET

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

RFQ #20-01 COMPREHENSIVE PLAN UPDATE CONSULTANT PROPOSAL RESPONSE FORM

I, Heather Branigin, hereby representing
(Agent Submitting RFQ)

Future iQ, Inc., have read and reviewed the attached specifications.
(Firm or Company)

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

Future iQ, Inc.
Company Name
P.O. Box 24687
Address
Minneapolis, MN 55424
City/State/Zip
612/757-9121
Telephone
27-1389416
Tax ID No.

Heather Branigin
Authorized Person (Print)
Heather Branigin
Signature
Vice President, Foresight Research
Title
16 October 2019
Date
heather@future-iq.com
E-Mail Address

Attach additional sheets/envelopes for each:

Tab A

Tab B

Tab C

CITY OF SMITHVILLE
MISSOURI
RFQ# 20-01 COMPREHENSIVE PLAN UPDATE CONSULTANT
OCTOBER 18, 2019

SMITHVILLE
COMPREHENSIVE
PLAN



Submitted by:
Future iQ, Inc.
P.O. Box 24687
Minneapolis, MN 55424
www.future-iq.com

David Beurle
david@future-iq.com
612-757-9190

Heather Branigin
heather@future-iq.com
612-757-9121



Create Future Intelligence®

Future iQ, Inc.
P.O. Box 24687
Minneapolis, MN 55424
US Federal Tax Number:
EIN: 27-1389416

October 18, 2019

Jack Hendrix
Development Director
City of Smithville
107 W. Main Street
Smithville, MO 64089

RE: RFQ # 20-01 Comprehensive Plan Update Consultant

Dear Mr. Hendrix,

Future iQ is pleased to submit this proposal to work with the City of Smithville to develop a new Comprehensive Plan. As you are aware, Future iQ has been leading the Community Visioning effort, which is now in its final stages. This process has been notable in the quality of the community and scale engagement, and the degree that the community has coalesced around an emerging vision. Also, of significant importance is the strong appetite for change in the community, both in terms of the actual community evolution and infrastructure trajectory, which has been consistently reiterated during the process. The work that we have carried out in the Vision and Strategic Action Planning work provides an important contextual foundation for the Comprehensive Planning process, which is the vehicle for the City to institutionalize and enact this vision.

The initial community prioritization in the visioning process has identified a series of strategic pillars, that include:

- Continued Commitment to Education
- Enhanced Recreation and Connectivity
- Diverse Housing and Neighborhood options
- Strengthened Business and Economic Development
- Retention of Small-Town Feel and Sense of Community

These are foundational issues that would be very well suited to be tackled in the Comprehensive Planning process. The future development of the downtown, and the way all of these elements come together offers the prospect of a very exciting innovative planning framework for community residents and City staff to be the architects of the future of Smithville.

Due to the importance of the downtown area, coupled together with a focus on economic development and the desire to define unique neighborhoods, Future iQ has partnered with Jon Stover & Associates (JS&A) to present this proposal. JS&A is a small but impressive firm, that

specializes in place-based economic development, and offers great expertise and a complete value fit with Future iQ.

Future iQ and JS&A share a commitment to deliver personal, innovative and customized projects on time and on budget. Our hands-on approach, as well as the effectiveness of our methodology, will assist the stakeholders of Smithville to maximize the value of the planning process and achieve realistic and actionable outcomes. Future iQ has strong globally proven stakeholder engagement processes, and JS&A brings certified planning credentials and deep relevant economic development experience. We believe this combination will lead to a new Comprehensive Plan that can be supported by community stakeholders and will authentically reflect the community vision.

In the interests of full transparency, we should note that while both firms have worked on many aspects of comprehensive plans, neither of our firms have previously independently completed full-scale comprehensive plans. While we recognize this lack of a track record in full-scale comprehensive plans might be a detraction, we believe we have demonstrated our professionalism and value for money ethos in the visioning process. Also, we believe our desire to innovate and produce original work will offer a refreshing and earnest work team for the Smithville Comprehensive Planning.

For Future iQ , this is a chance work with an innovative community on the cusp of real change, and to conduct it in a way that offers excellence and value for money. We also know the issues that the City of Smithville are facing, due to our work on the City of Smithville Vision and Strategic Planning process.

It would be our privilege to work with the City of Smithville on this initiative. Please contact me for clarifications as needed. Thank you for your consideration.

Yours sincerely,

A handwritten signature in black ink, appearing to read "David Beurle", with a stylized flourish at the end.

David Beurle
CEO, Future iQ, Inc.
Tel: 612-757-9190
Email: david@future-iq.com

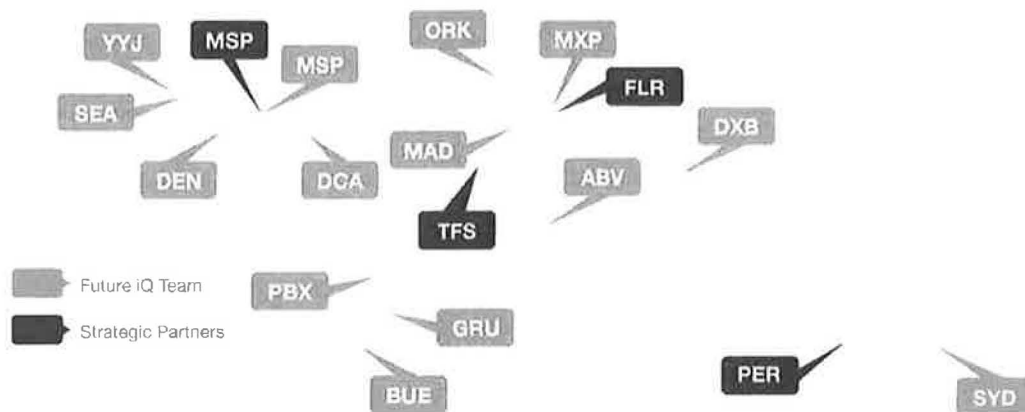
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1.0 Summary/Brief History of the Firm

1.1 Firm Background – Future iQ

Future iQ is a global research and consulting company specializing in visioning and strategic planning for regions, cities, communities, and industries. Founded in 2003, Future iQ's global footprint brings a broad perspective and delivers transformational customized solutions to local environments. With seven staff members, four strategic partners and four country representatives, Future iQ's clients span North America, Europe and Australia. Future iQ works across cultures, sectors and languages to shape unique and effective planning solutions that span regions and sub-regions. The Team assigned to this project has extensive experience in planning projects in the United States.



Future iQ specializes in the following functional and sector areas:

- City, Urban and Regional Planning
- Economic and Workforce Development
- Defense Sector Engagement
- Organizational and Corporate Planning
- Non-profit Strategic Planning
- Tourism Industry Planning and Analysis

Future iQ's specialized methodology includes:

- Strategic Planning and Visioning
- Stakeholder Engagement
- Network and Supply Chain Mapping
- Data Visualization
- The Future Game
- Customized Foresight Research

For more information, please visit Future iQ's website at: <http://future-iq.com>

1.2 Firm Background – Jon Stover & Associates (JS&A)

JON STOVER & ASSOCIATES

Bridging the Gap Between Local Government,
Business, Development, and the Community



ECONOMIC DEVELOPMENT CONSULTING

We help make neighborhoods great

Jon Stover & Associates (JS&A) works with public, private, and nonprofit organizations to bridge the gap between the very different worlds of local policy, business, urban design, community interest, and real estate development. In doing so, we inform, develop and implement strategies to strengthen a place economically, visually, and socially. Whether you are seeking to shape your parcel, corridor, city or region, we look forward to working with you.

OUR HISTORY

JS&A is a certified business enterprise (CBE) in the District of Columbia that specializes in economic and real estate analysis, neighborhood revitalization strategy, and stakeholder coordination to implement what needs to get done. Founded in 2009, JS&A has completed hundreds of projects around the country for city agencies, real estate developers, community groups, non-profit organizations, and private business owners. Please visit www.jonstoverandassociates.com for more information on our services and our portfolio of work.

OUR SERVICES

Analysis



Strategy



Implementation



Jon Stover & Associates | (202) 695 - 4956 | www.stoverandassociates.com | 1718 1/2 Florida Ave NW, Washington, DC

2.0 Understanding of the Scope of Services

The City of Smithville has been undertaking a Community Visioning effort which is now in its final stages. This process has revealed a strong appetite for change in the community, both in terms of the actual community evolution and infrastructure trajectory. The Vision and Strategic Action Planning work provides an important contextual foundation for the Comprehensive Planning process, which is the vehicle for the City to institutionalize and enact this vision. The initial community prioritization in the visioning process has identified a series of strategic pillars, that include:

- Continued Commitment to Education
- Enhanced Recreation and Connectivity
- Diverse Housing and Neighborhood options
- Strengthened Business and Economic Development
- Retention of Small-Town Feel and Sense of Community

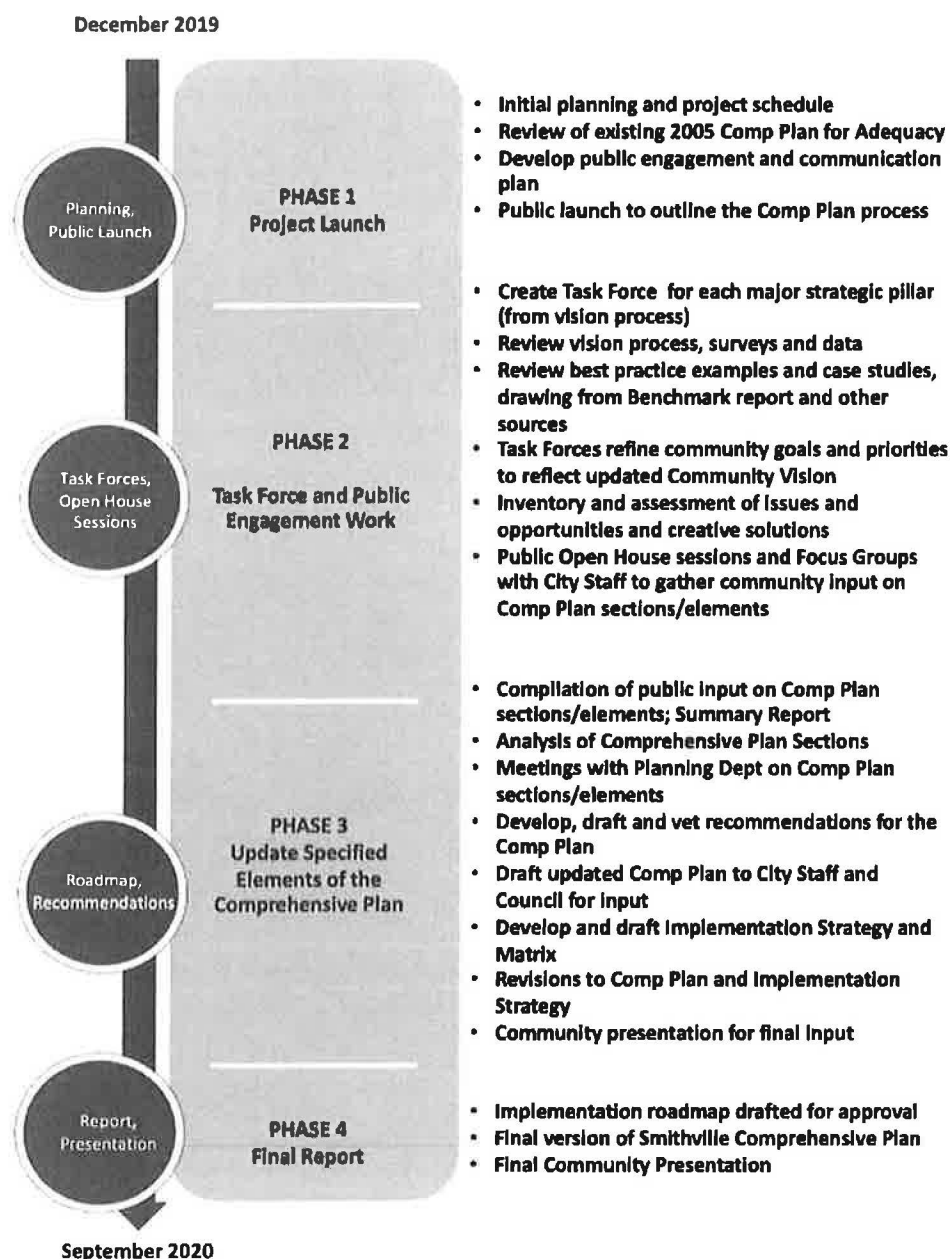
The future development of the downtown, and the way all of these elements come together offers the prospect of a very exciting innovative planning framework for community residents and City staff to be the architects of the future of Smithville. This is an innovative community on the cusp of real change.

The Comprehensive Planning process offers the vehicle to seamlessly transition from the visioning work into implementation. The ultimate purpose the new Comprehensive Plan will be to provide a policy and planning guiding document that will reflect and respond to the priorities, values and desires of residents and stakeholders. The new Comprehensive Plan will guide decision-making and develop a pathway forward to achieve Smithville's vision over the next twenty years. The Plan will reflect incremental changes and action-oriented policies that will both allow this vision to foster and ensure accountable implementation.

3.0 Approach to the Project

The proposed scope of work is implemented in phases that build momentum around an aligned vision and strategies for Smithville's Comprehensive Plan. The production of deliverables is divided into four phases outlined below. The plan is intended to be realistic and implementable and presented in an easy to understand and reader friendly manner for all audiences. It will identify future opportunities and align resources for development throughout the City. All key areas of work, expectations and deliverables outlined in the RFQ will be included in the scope of work and incorporated into the following phases.

Proposed Project Work Plan



3.1 Phase 1: Project Launch

This project will begin with meetings between Future iQ and JS&A team members and Smithville City Staff to establish a final work program and schedule specifying the number and type of planned meetings, weekly updates, engagement activities and deliverables to occur throughout the project. Phase one will also involve significant background research on current plans including a review of the existing 2005 Comprehensive Plan to assess its adequacy. This research will be undertaken to understand those strategic directions already established and to identify progress made towards meeting those objectives.

Future iQ and JS&A's thorough planning and clear communication builds public confidence in the planning process.

Phase one will include the development of a detailed public engagement and communication plan for the duration of the project. As part of this plan, Future iQ will assist Smithville in communications about the comprehensive planning process, both through traditional and digital media. It is our firm belief that consistent and easily accessible project communications add to the transparency of the process and encourage participation. Team members will work throughout the project to update and keep current the project information distributed to community stakeholders.



To kick off the project's Comprehensive planning process with the public, Future iQ and JS&A will work closely with Smithville Staff to organize a public 'Launch'. This is usually a 2-hour social gathering that introduces the Consultant Team to the community and gives the City an opportunity to introduce the Comprehensive planning process and share their aspirations for the project and its outcomes. The launch will include a short overview of the visioning and strategic planning results with an explanation of its bridging to the comp planning process. An example of the transition is Future iQ's specific work, "Nodes and Modes" is highlighted in a recent project in Edina, MN, an inner-ring suburb of

Minneapolis. These workshops explored how to bring reality to the City's community vision by bridging the strategic pillar of "Nodes and Modes" to its upcoming Comprehensive planning phase through the use of Small Area planning.


The launch will have tables for each Comp Plan element that will encourage input and provide information to the public on the current status of each element. Information will also be provided as to how community members may further participate in the planning process, including the creation of a specific community Task Force for each major strategic pillar of the strategic action plan. These Task Forces will merge purposes to work to accomplish the action items of the strategic plan through the comprehensive planning process.

Deliverables from Phase 1 will include:

- Initial planning and project schedule
- Review of existing 2005 Comp Plan for Adequacy
- Develop public engagement and communication plan
- Public launch to outline the Comp Plan process

3.2 Phase 2: Task Force and Public Engagement Work

Engagement is a cornerstone of Future iQ's planning methodology. Key to effective stakeholder engagement is building momentum and excitement around a plan as it is created. As with the visioning and strategic planning initiative, the Team will use a variety of engagement methods to build this momentum – from large kick-off events, to targeted workshops, focus groups, and meetings that reach all corners of the community. Future iQ and JS&A will go deep and wide to gather input, and strive to reach those who don't usually participate in the public process. An example of this varied approach would include using Instagram in the social strategy so that people can engage visually and give feedback on the pros and cons of things they like or don't like in the City.



Broad stakeholder engagement allows Smithville stakeholders to add their voices to the planning process.

To begin this phase, the project team will work with the City to form a Task Force for each pillar of the Strategic Action Plan. Those who signed up at the launch will be invited and a public notice will be issued inviting any community members who may have missed the launch.

Future iQ and JS&A will conduct in-depth reviews of the visioning process, surveys and data accumulated from the strategic planning process. The Team will also review best practice examples and case studies drawing from the Benchmark report and other sources to have a sound background in relevant successful potential initiatives for Smithville. The Team will then convene the community Task Forces to work on the sections/elements of the comprehensive plan to gather input and build on recommended initiatives and priorities. This process will involve refining community goals, priorities and policies to reflect the updated community vision and strategic planning process. At this stage, an inventory and assessment of issues and opportunities will be compiled to inform the more detailed development of the comprehensive planning sections/elements in phase three.

To complete phase two, Future iQ and JS&A will facilitate public Open House sessions and Focus Groups with City Staff to gather community input and ideas on the Comprehensive Plan sections/elements. This input will be incorporated into the inventory and recommendations for each plan section/element provided to the City department planning in phase three.

Lab Portal is key to providing transparent communications

Future iQ developed the Lab Portal platform to provide a people-focused, data-driven approach to planning and key issue analysis. The Lab portal is used to provide community stakeholders with up to date information on project progress, to gather input, and provide helpful resources. Future iQ used the Lab Portal for Smithville's visioning and strategic planning process. Please see: <https://lab.future-iq.com/city-of-smithville/>

Deliverables for Phase 2 include:

- Create Task Force for each major strategic pillar (from vision process)
- Review vision process, surveys and data
- Review best practice examples and case studies, drawing from Benchmark report and other sources
- Task Forces refine community goals and priorities to reflect updated Community Vision
- Inventory and assessment of issues and opportunities and creative solutions
- Public Open House sessions and Focus Groups with City Staff to gather community input on Comp Plan sections/elements

3.3 Phase 3: Update Specified Elements of the Comprehensive Plan

Following the engagement phase, Future iQ and JS&A will begin work on updating the specified elements of the Smithville Comprehensive Plan. Results from all public input will be compiled into a Summary Report and incorporated into the development of the final Plan. Planning meetings will be held with City departments to further analyze and develop the plan section updates.



Input from stakeholders will be analyzed to build clear themes that support the comprehensive planning framework.

Future IQ and JS&A will work together to assess the existing conditions, understand the community's shared vision for the future, and work with the City to identify goals, needs, and opportunities. This analysis and conversations will allow our team to work collectively with Comprehensive Plan stakeholders to ensure findings and recommendations are appropriate and aspirational yet achievable within the coming years. In addition to the introductory community assessment, the Comprehensive Plan analysis components will include:

- **Community Context and Goals.** Our team will assess both quantitative data sources and qualitative visioning to develop an up-to-date Community Profile of Smithville. This community context section will not only include how the city fits into the surrounding region but also current population demographics and characteristics and any changes since the 2005 Plan. We will leverage Future IQ's Strategic Planning work and engagement to identify key goals and visions to guide the Comprehensive Planning process.
- **Land Use Plan.** Our analysis will include both analysis of the existing land uses in Smithville, changes since the 2005 Future Land Use Plan, and updates to the Future Land Use Plan for the city. Land use decision-making, aligning with community goals, needs and city visions for the future, is often the crux of Comprehensive Planning. We anticipate analyzing the following Land Use Categories as presented in the 2005 Plan: Conservation Areas, Parks, Public and Institutional, Residential (Low and Medium Density), Commercial, Business Park,

and Mixed-Use. This assessment will include working with Smithville to identify policies and actions for implementation that will help guide development and land use decisions.

- **Character Areas.** Smithville's 2005 Comprehensive Plan identified key Character Areas including the South 169, Hospital Bluff, Downtown, North Residential, and Conversation Areas. Our team will work with the city to explore how these areas have changed since the Comprehensive Plan, explore how Smithville's vision for the future will impact these areas, and determine if any additional Character Areas should be included in the Comprehensive Plan updates. This will provide an opportunity for our team to work with Smithville to identify policies and principles to help future decision-making in these areas, leverage unique assets, and nurture and cultivate the characteristics that define Smithville.

Transportation. This component of the Comprehensive Plan will review the transportation conditions and needs that have developed since the 2005 Comprehensive Plan. We anticipate assessing how the proposed Principles for Creating a Road System, Roadway Character, and Street Elements have progressed in the past fifteen years. We will assess opportunities to incorporate recommendations for implementing transportation policies that meet the transportation needs of Smithville today and to accommodate the projected changes in the city.

Infrastructure. Our team will work with the relevant Smithville City Departments, including the Water & Sewer Department, and representatives from Clay and Platte county departments to understand how projected future changes in Smithville will impact the city's infrastructure systems. We will work collectively with these stakeholders to shape relevant and important policy updates surrounding water systems, wastewater and sewer systems, and stormwater management.

Accountable and Actionable Implementation. Importantly, our team values creating plans that are action-oriented and implementable so that our clients have the ability to incrementally execute decisions over time to achieve the desired collective vision of the city. Our philosophy follows the American Planning Association's latest standards for Comprehensive Plans. We will ensure that our Smithville Comprehensive Plan will be best positioned for implementation by understanding the collective community goals and vision, developing objectives that support these goals, focusing policies to guide decision making, and articulating actions to carry out the Comprehensive Plan.

Building off the recent City's recent visioning and strategic planning initiative, Future iQ and JS&A recommend adding two sections/elements to the new Smithville Comprehensive Plan: Major Street and Trails and Economic Development. Given the high priority stressed on these areas by the community in the visioning process, the addition of these two sections would represent concrete action to move the City towards its preferred future. Details of these additions are explored in the addendum to this proposal in Section 12.0.

It should be noted that JS&A will lead in leveraging GIS for this project. Each section of the Comprehensive Plan will include GIS maps and analysis as applicable and appropriate.

Future iQ and JS & A will work closely with City Staff, the Task Forces and City Council to develop, draft and vet policy recommendations for the new Smithville Comprehensive Plan.

After the Comprehensive Plan is drafted, our proposed project scope includes working with City staff and agencies to develop and draft an Implementation Strategy and Matrix. This Strategy will feature measurable objectives, indicators, benchmarks and targets to initiate and begin to implement the recommendations articulated in the Plan. Input and feedback on the draft plan and implementation strategy will be sought and revisions will be made accordingly.

The final step in phase three will be a community presentation of the draft Comprehensive Plan to the public to gather final input.

Deliverables for Phase 3 include:

- Compilation of public input on Comp Plan sections/elements; Summary Report
- Analysis of Comprehensive Plan Sections
- Meetings with Planning Department on Comp Plan sections/elements
- Develop, draft and vet recommendations for Comp Plan sections/elements
- Draft updated draft updated Comp Plan to City staff and Council for input
- Develop and draft Implementation Strategy and Matrix
- Revisions to the Comprehensive Plan and Implementation Strategy
- Community presentation for final input

3.4 Phase 4: Final Report

Final steps in the comprehensive planning process incorporate all input on the draft plan from City staff and Council, the public and Task Forces. Team members will also use this opportunity to work with the City and others to make sure the implementation strategy plans for fiscal sustainability by developing realistic, achievable targets. A implementation roadmap will be developed to recommend a course of action along a timeline to implement the Comprehensive Plan. The Plan will be created with the understanding that it must be adaptable to current conditions over time including considerations for the next planning process. Once the plan is approved by the City Council, Future iQ will provide an .pdf electronic version of the plan to City Staff.



The Smithville Comprehensive Plan will be an innovative forward-looking planning tool that will be adaptable to current conditions over time.

The final Smithville Comprehensive Plan will be presented by the Project Director to the City at a meeting designated in the initial project planning discussions.

Deliverables for Phase 4 include:

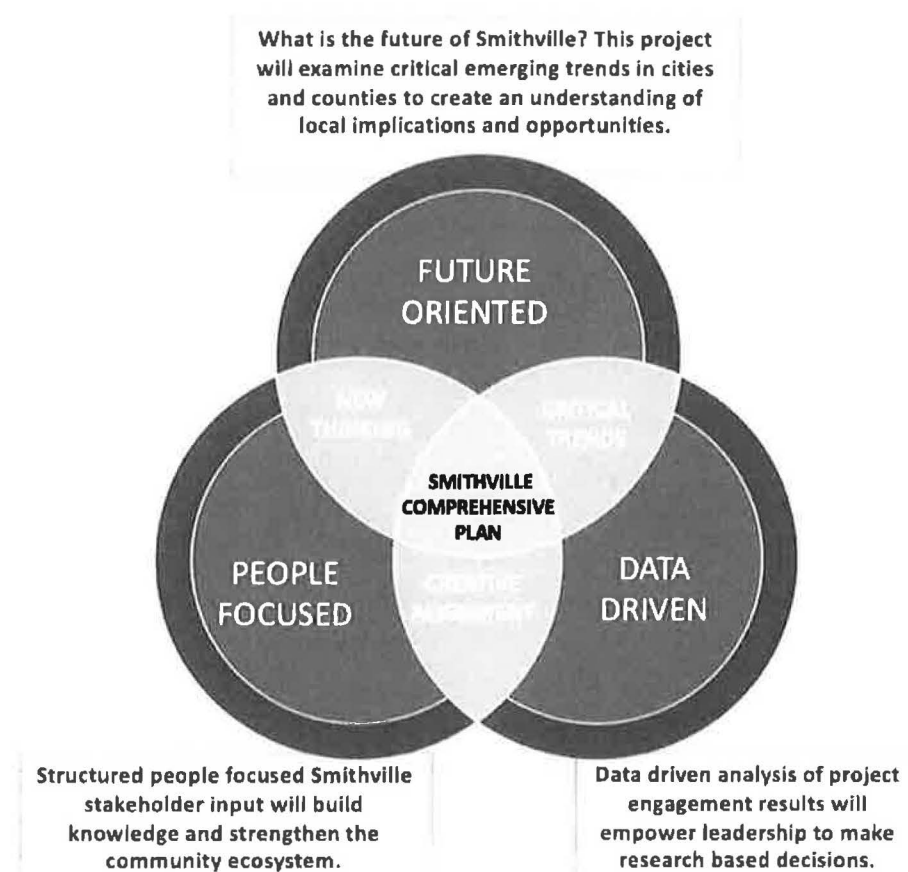
- Implementation roadmap drafted for approval
- Final version of Smithville Comprehensive Plan
- Final community presentation

3.5 Proposed Methodological Approach

Future iQ and JS&A bring both global and national perspectives to visioning, economic development and strategic planning that is invaluable to local interests. For Smithville, this means access to a wealth of knowledge and experience in planning for cities, counties, regions, nonprofits and global corporations. Future iQ and JS&A will use this experience to guide and inform this project and will work with Smithville City Staff and Council to develop comprehensive, future-oriented, sustainable and implementable strategies to support the new Smithville Comprehensive Plan. The Plan will balance priorities across the important dimensions specific to Smithville and incorporate global, national and local best practices.

Future iQ's planning methodology is based on three primary principles. It is Future Oriented, Data Driven and People Focused. The 'future orientation' is particularly important to take account of rapidly emerging technological trends. The 'data driven' ensures the plan is built on solid research and information. The 'people focused' is important to build support for the plan within Smithville and the regional eco-system, and to harness the best possible input into the plan formulation.

Methodological Framework



3.5.1 Future Oriented Research

Future iQ produces global foresight publications and research to help our clients build understanding about important future trends impacting cities, regions, communities and industries. This insight helps stakeholders to effectively plan for the future. During this project, Future iQ and JS&A will draw from their respective research to present customized trend analysis and information most relevant to Smithville. This will help community members explore new thinking and ideas, and critically examine emerging challenges and opportunities.



Cities of the Future (2015)

Explores trends that have the potential for widespread adoption over the next two decades.



Future of Tourism (2018)

Explores emerging trends impacting outdoor and recreation-based tourism industries.



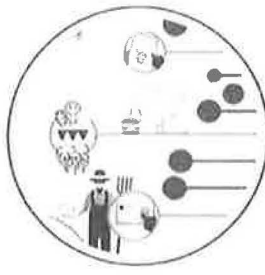
Future of Manufacturing (2016)

Analyzes and provides insights on the key trends that are impacting the global manufacturing sector.



The Next Industrial Revolution (2018)

Explores the broad implications and impacts of an emerging world of accelerating digital technology, robotics and automation.



Future of Midwest Agriculture (2017)

Explores future trends and plausible scenarios for Midwest agricultural industries, economies and communities. Key trends include technological disruption, emergence of global forces and the importance of sustainability.



Global Consultations – Windsor Castle (2012 and 2018)

In partnership with St. George's house, Windsor Castle, Future iQ explored the challenges of building sustainable communities (2012) and explored the future of urban living (2018).



The Future of Food (2016)

Examines a range of critical catalysts of change relating to the global food supply chain, and the potential impact upon human health, the environment and food security.

3.5.2 People Focused Engagement

Future iQ's people-focused engagement process facilitates real conversations that get to the heart of the matter and builds consensus. From large-scale participatory industry forums to targeted focus groups and online survey mechanisms, Future iQ and JS&A's wide range of engagement methods encourage people to be part of the decision-making, visioning and planning process. This hands-on engagement will be a very important feature of the proposed engagement aspects of this project.



Think-Tank – Scenario Planning

The Think-Tank is an innovative approach to stakeholder engagement. It focuses on scenario-based strategic planning and stresses the role of future-thinking to identify shared interests and common concerns.



Community and Stakeholder Outreach

Throughout the planning process Future iQ engages a broad cross section of stakeholder cohorts using meaningful and inclusive engagement methods.



Large Scale Stakeholder Sessions

Large scale groups build momentum and community stakeholder enthusiasm for the planning process.



Focus Groups and Planning Workshops

Targeted focus group sessions and customized vision workshops deliver invaluable qualitative and quantitative stakeholder engagement insights.



Simulation Learning Future Game®

The Future Game is a planning simulation tool provides stakeholders with a dynamic gaming experience rewarding collaboration, innovation, and teamwork.



Student Sessions The Youth Voice

Individual classroom and large group visioning sessions empower the youth voice in future planning for communities.

3.5.3 Data Driven Methodology

Future iQ and JS&A specialize in sophisticated data collection and analysis. Using our innovative Future iQ Lab Portal, consistent and updated project information will be presented in a way that allows Smithfield stakeholders to see how their personal input helps shape the overall vision and comprehensive planning.



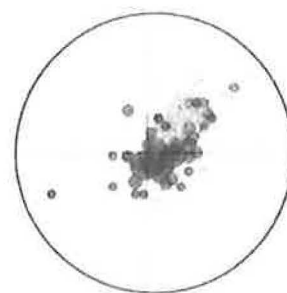
Stakeholder Surveys

Comprehensive stakeholder data, presented in a transparent and interactive manner, can help build rapid alignment around key points of consensus. This enables organizational leadership to make decisions and planning actions that are defensible and supported by the voices of all stakeholders.



Best Practices Benchmarking

Multi-dimensional benchmark studies and analyses of cohort communities provide valuable insight to clients.



Data Visualization

Survey results will be collected and presented in an innovative and interactive data visualization platform. This will allow stakeholders to examine the data collected from surveys themselves, explore levels of alignment or divergence around key topics, and selectively filter to view perspectives from their own sector, or other profile category.



Lab Portal

A customized Lab Portal gives clients a centralized location for project information, engagement dates, reports, and survey result data visualization.



Data Insights

Key data insights and analysis throughout the visioning process provide clients a glimpse into community sentiment and priorities.



Future Insight

Future insight and trend analysis during strategy development give clients the opportunity to consider the impacts and implications of future trends on current local planning.

4.0 Key Personnel

Future iQ is proposing to partner with the firm of Jon Stover and Associates (JS&A) for this project. The combined skillsets will bring significant strategic and small area planning, economic development, downtown planning, urban design and engagement experience to support the outcomes necessary to produce Smithville's Comprehensive Plan. The client-facing project team members presented have significant experience working on visioning and economic development, small area and strategic planning projects. We recognize that this project requires significant periods for intensive workloads and our team availability will allow sufficient team resources to be deployed, both on-site and for data analysis and report preparation. The proposed team members are an experienced and reliable team, with a complementary mix of required skills in:

- Highly developed critical thinking capacity in the areas of visioning and strategic planning, organization design, and collaboration building
- Knowledge and experience with municipalities, corporations, regional entities and non-profit organizations
- Detailed practical experience in downtown planning and design, small area planning, research, stakeholder engagement, economic and data analysis and data visualization
- Project management and stakeholder workshop facilitation, including extensive experience in visioning, economic and workforce development, industry cluster development, environmental planning, economic analysis and impacts research

All team members are confirmed to be available for the time frames and delivery as outlined in this response and will be directly accountable to Project Director David Beurle, CEO, Future iQ.

Below are the respective team member roles for this project:

Team Member	Title	Role
David Beurle	CEO, Future iQ	Project Director, Facilitation, Strategy Development
Celine Beurle	COO, Future iQ	Communications, Marketing
Heather Branigin	Vice President, Foresight Research, Future iQ	Research, Strategy Development, Engagement, Writing
Johanna Hoffman	Sr. Foresight and Planning Specialist, Future iQ	Urban Design and Environmental Planning, Engagement
Walter Paixao-Cortes	Data Engineer, Future iQ	Data Analysis and Visualization
Tobiloba Adaramati	Data Analyst, Future iQ	Data Analysis
Jon Stover	Managing Director, Jon Stover & Associates	Lead Planner, Economic and Impact Analysis
Leslie Deacon	Project Manager, Jon Stover & Associates	Physical Planning, Economic Analysis, Community Development
Aaron King	Consultant, Jon Stover & Associates	Market Analysis, Development Feasibility

For complete Team Member resumes, please see **Tab A**.

5.0 Recent Similar Experience

5.1 Recent Similar Experience with Client Contacts – Future iQ

1. Coppel Vision 2040 and Strategic Plan, Texas (2018-2019)

The City of Coppel contracted with Future iQ to develop the Coppel 20Next Plan involving both visioning and a new strategic plan for the City. The project lasted approximately 12 months, and involve da Benchmark Analysis, Think-Tank, extensive community and stakeholder engagement, data collection, analysis and visualization, as well as a strategic plan with a roadmap and key measures for success. <https://future-iq.com/project/coppel-vision-2040-usa-2018/>

Contact: Traci E. Leach, Deputy City Manager
City of Coppel, 225 E. Parkway Blvd., Coppel, TX
Tel: 972-304-3672 Email: TLeach@coppelltx.gov

2. City of Edina, Minnesota (2014-2015 and 2017)

Vision Edina (2014-2015)

Future iQ was contracted by the City of Edina to design and facilitate the Vision Edina initiative to develop a scenario-based strategic vision framework for the city's future. From a strategic planning perspective, Vision Edina examined the challenges and opportunities that were identified as having the highest priority within the community. These included the community's stated desired features to be inclusive and connected; to maintain a "build-to-scale" development perspective; to pursue sustainable environment policies; to remain and build its status as being a community of learning; and to be future-oriented in its planning initiatives. The project produced a Benchmark Analysis, Think-Tank Report, Community Engagement Report and a Community Vision Report. Link: <http://future-iq.com/projects/vision-edina/>

Nodes and Modes – Bridging Vision to Comprehensive Planning (2017)

Future iQ was contracted to facilitate the linking of the visioning process to the update of Edina's 2018 Comprehensive Plan. The first bridging session consisted of a "Big Ideas" Workshop to gather community thoughts about ideas that express the Nodes and Modes concept into the future design of the city. The second session was a participatory mapping workshop that explored the Nodes and Modes concept as it related to the redevelopment and small area planning in the Comprehensive Plan. Project link: <https://future-iq.com/project/nodes-modes-city-edina-usa-2017/>

Contact: Scott Neal, City Manager
City of Edina, 4801 W. 50th Street, Edina, MN 55424
Tel: 952-826-0401 Email: sneal@edinamn.gov

3. Middle Georgia Economic Alliance, GA - Regional Action Plan (2018)

Future iQ was contracted by the Georgia Department of Economic Development (GDECD) to produce an innovative strategic roadmap and regional Plan for Action that

will build economic resiliency and guide the region's stakeholders well into the future. The Plan for Action will be used by Middle Georgia communities and companies in the region to guide and inform leadership and stakeholders of the array of development opportunities available to them. The project included extensive community engagement, charrettes, network mapping, data collection and visualization and the production of a final report. <https://future-iq.com/project/middle-georgia-economic-alliance-usa-2018/>

Contact: Angie Gheesling, Executive Director
Development Authority of Houston County
Office: 478-923-5470 Cell: 478-550-2650
Email: gheesling@houstoncountygga.net

4. Town of Hilton Head Island, Community Vision and Strategic Action Plan, South Carolina (2016-2018)

Future iQ was engaged to create a long-term comprehensive community vision and strategic action plan that will guide the community of Hilton Head Island for the next 10-20 years. This project involved extensive community engagement, stakeholder interviews, community surveys, data visualization and analysis, the development of a communications plan and Brand, as well as a strategic roadmap for the vision once created. <http://future-iq.com/project/hilton-head-island-south-carolina-usa-2016-17/>

Contact: Jennifer Ray, ASLA
Planning and Special Projects Manager
Town of Hilton Head Island
One Town Center Court
Hilton Head Island, SC
Tel: 843-341-4665
Email: jenniferr@hiltonheadislandsc.gov

5. B.E.S.T. of Waseca County, Waseca Vision 2030 and Strategic Action Plan, Minnesota (2017-2018). In collaboration with the firm of LHB, Future iQ was engaged by the Waseca Business and Entrepreneurial Support Team (B.E.S.T.) to facilitate the development of a common vision, strategic plan and action plan for Waseca County, City and area organizations. The project involved a Benchmark Analysis, communications plan, extensive community engagement and data collection and visualization. The resulting vision, strategic action plan provided cohesion to community action as well as a unified voice for where the community needs to invest its resources. <http://future-iq.com/project/waseca-county-minnesota-usa-2017/>

Contact: Danny Lenz, CFO, Scott County
(former City Manager, City of Waseca)
Government Center, 200 Fourth Avenue West, Shakopee, MN 55479
Tel: 952-445-7750 Email: DLenz@co.scott.mn.us

6. City of Wayzata, Wayzata 2040 Community Vision, Minnesota (2017-2018)

Future iQ was contracted by the City of Wayzata to develop a new Community Vision that built on its recent Lake Effect project and created clear city-wide priorities for the future. The visioning process involved extensive community engagement and a scenario-based planning methodology that will help the community look forward to 2040. The intent was for the resulting vision and priorities to be innovative, inclusive and sustainable and to provide a roadmap to guide and inform Wayzata's comprehensive planning process. <http://future-iq.com/project/city-wayzata-minnesota-usa-2017/>

Contact: Jeffrey Dahl, City Manager
City of Wayzata, 600 Rice Street East, Wayzata, MN 55391
Tel: 952-404-5300 Email: jdahl@wayzata.org

5.2 Relevant Project Experience – Future iQ

A key feature of Future iQ's work includes planning projects for cities, nonprofit organizations, corporations, and regions. In addition to the projects with contacts in Section 5.1, below are examples of recent visioning, strategic and regional planning experience. Please also visit <http://future-iq.com/featured-projects/>.

Relevant Project Experience

- City of Smithville, MO, Community Vision and Strategic Action Plan (2019-present)
- Mitchell, SD, Community Vision and Strategic Action Plan (2019-present)
- Park City, UT, Community Vision and Action Plan (2019-present)
- Trotwood, OH, Organizational Strategic Plan (2019-present)
- Moosehead Lake Region, ME, Regional Master Plan (2016-17)
- Iowa DNR, Sustainable Materials Management - Vision for Iowa (2018-present)
- Tillamook County, OR, Strategic Vision and Action Plan (2018-2019)
- National Association of Development Organizations, Washington DC, Nationwide Strategic Plan (2018-present)
- McHenry County College, Crystal Lake, IL, Strategic Visioning and Foresight (2018)
- ECC Medical/Wellness Destination Strategic Marketing Plan, Edina, MN (2018-2019)
- CEDA, ID, Visioning and Economic Development Leadership Training (2018-2019)
- Global Foresight Consultations at Windsor Castle, U.K. (2012 and December 2018)
- Community Action Partnership of Hennepin Co., Minneapolis, MN, Strategic Plan (2017)
- Future of Midwest Agriculture, University of Minnesota (2017 – present)
- Travel Oregon, Statewide Regional Tourism Planning (2016-18)
- Maine Woods Tourism and Economic Development, ME (2017-2018)
- North Tyrrhenian Sea-Mediterranean Ports Project, Italy/France (2015-16)
- Edina Chamber of Commerce Economic Development Strategy, Edina, MN (2016-2017)
- Province of Alberta, Small Business Strategy, Canada (2009-2014)

For detailed project descriptions, please see **Appendix A**.

5.3 Department of Defense, Office of Economic Adjustment Projects – Future iQ

Future iQ has facilitated OEA funded projects since 2008 because of its ability to bring stakeholders together to tackle real issues of economic adjustment and opportunity facing local and regional communities throughout the United States. The OEA used Future iQ as a model of this excellence when it consulted Future iQ's CEO, David Beurle, to contribute his expertise to its communications and public outreach sections in the 2013 publication, *Local Official's Guide to Defense Industry Adjustment*. https://future-iq.com/wp-content/uploads/2015/10/GV4501104_DoD_OEA-Guide_v7_SinglePages.pdf

Below is a list of seven Future iQ OEA projects.

State of Vermont, VT – OEA Grant Management and Regional Collaboration (2019-present)

Future iQ has been contracted by the State of Vermont to facilitate OEA grant program management and regional collaboration for the six New England states that make up the New England Collaborative. This project will involve background research and interviews of key stakeholders, the Collaborative Future Think-Tank, identifying and building linkages and partnerships within New England defense clusters, network mapping, sustainability planning, governance support, advocacy, and event travel on behalf of the Collaborative. Project publications will include a Scenarios of the Future Report, a Strategic Action Plan, and Board of Directors' governance documents. <http://future-iq.com/project/new-england-regional-defense-industry-collaboration-usa-2019-20/>

City of San Diego, CA – Regional Economic Planning (2016-present)

Future iQ has been contracted by the City of San Diego, as part of a Department of Defense, Office of Economic Adjustment funded project (Phases One and Two). This area is home to the largest concentration of military assets in the world. The Future iQ work has included the facilitation of Regional Leadership Group meetings, network mapping, economic data collection and analysis, scenario planning and visioning, stakeholder engagement and the Propel San Diego Strategic Roadmap detailing the outcomes of the 2016 grant award to the City of San Diego. <http://future-iq.com/project/city-san-diego-california-usa-2016-17/>

Middle Georgia Economic Alliance, GA - Regional Action Plan (2018)

Future iQ was contracted by the Georgia Department of Economic Development (GDEcD) to produce an innovative strategic roadmap and regional Plan for Action that will build economic resiliency and guide the region's stakeholders well into the future. The Plan for Action will be used by Middle Georgia communities and companies in the region to guide and inform leadership and stakeholders of the array of development opportunities available to them. The project included extensive community engagement, charrettes, network mapping, data collection and visualization and the production of a final report. <https://future-iq.com/project/middle-georgia-economic-alliance-usa-2018/>

**New Hampshire Aerospace and Defense Consortium (NHADEC), NH
Strategic Action Plan (2017-2018)**

Future iQ was contracted by the State of New Hampshire to develop a five-year strategic action plan for the New Hampshire Aerospace and Defense Export Consortium (NHADEC). Funding was provided by the Department of Defense, Office of Economic Adjustment. The work included scenario planning and visioning, stakeholder engagement and the production of a long-term strategic plan document that details and prioritizes opportunities and challenges that affect NHADEC's interests and capabilities. <http://future-iq.com/project/aerospace-defense-export-consortium-strategy-development-new-hampshire-usa-2017/>

Allen County, OH - Regional Collaborative Growth Plan, Greater Lima Region (2015-2017)

Future iQ was contracted to design and lead the US Department of Defense, Office of Economic Adjustment funded Phase 1 and 2 of this project. The project involved scenario planning and stakeholder engagement, detailed network mapping, a regional asset inventory, customized research and extensive organizational facilitation and a strategic action plan for the County. Phase 2 also included a comprehensive gap analysis of the region, an analysis of local product innovation opportunities and needs, detailed economic and workforce planning and modeling, collaborative action planning, stakeholder engagement and updated network mapping. The project produced a regional collaborative growth plan. <http://future-iq.com/project/greater-lima-region-2016/>

Oshkosh Initiative, WI – Regional Collaborative Action Plan (2014-2016)

Future iQ was contracted to design and lead a 5-county Fox Valley regional planning effort as part of the economic and workforce diversification and response strategy funded by the US Department of Defense, Office of Economic Adjustment. This region is home to Oshkosh Corporation, a major defense contractor, and supports a strong manufacturing sector. The project involved detailed network mapping, the development of an East Central Industry Diversification Strategy, and a charrette planning process to develop a Regional Collaborative Action Plan. <http://future-iq.com/project/fox-valley-wisconsin/>

Texarkana, TX – Strategic Implementation Plan (2015)

Precipitated by concerns regarding workforce alignment and the future of the Red River Army Depot (RRAD), Future iQ was contracted by Workforce Solutions Northeast Texas to develop a Strategic Implementation Plan, and help move the process from strategy to action with accompanying recommendations. The process resulted in a strategic implementation plan focused on workforce retention and economic growth for the region surrounding RRAD. <http://future-iq.com/project/texarkana-defense-project-texas-usa/>

5.4 Recent Similar Experience – JS&A

5.4.1 Middlebury Downtown Master Plan, Middlebury, VT (2019)

JON STOVER & ASSOCIATES

Project Profile - Middlebury Downtown Master Plan



Client: Town of Middlebury,
Planning & Zoning

City: Town of Middlebury, VT

Date: 2019

Role: Subconsultant on team with Town
Planning & Urban Design
Collaborative

Scope: Demographic Projections
Population Projections
Employment Projections
Land Use Analysis
Real Estate Market Analysis
Housing Supply and Projections
Economic Analysis
Stakeholder Engagement

PROJECT SUMMARY

Jon Stover & Associates is currently serving as a subconsultant for Town Planning & Urban Design Collaborative to help guide the Town of Middlebury in its Downtown Master Plan. This Master Plan aims to understand the current conditions of the town, projections for the future, and a pathway forward leveraging its assets, anticipated changes, and community vision.

SCOPE DETAIL

Projected Changes. JS&A is assessing the projected changes in the demographics and population of Middlebury in the coming years. This assessment includes not population projections, but economic conditions as well, including employment and income.

Land Use Analysis and Market Conditions. Working with the project team, JS&A will help analyze the town's land uses and their relation to real estate market conditions. This analysis will include residential land uses (product, ownership, home values, sales and rent trends, locations, supply and demand, and affordability), commercial land uses (including office and retail occupancy, lease rates and trends, conditions, leakage, and regional context), and hospitality land uses (existing supply and demand). This land use analysis and market conditions will conclude in a SWOT analysis.

Community and Stakeholder Engagement. JS&A is engaging with key stakeholders and community members throughout the project. This engagement will include in-person charrettes, presentations, and focus groups to understand the community's vision, the city's goals and needs, and the opportunities at play to shape the Town of Middlebury and its future.

5.4.2 DPW Public Works Master Plan, Washington, DC (2015)

JON STOVER & ASSOCIATES

Project Profile - DPW Public Works Master Plan

JS&A Economic
Development
Consulting



Client: DC Department of Public Works,
Department of General Services,
and Office of Planning

City: Washington, DC

Date: 2015

Role: Subconsultant under Mosaic Urban
Partners and Ayers Saint Gross

Scope: Land Use Analysis
Residential Land Use
Retail Land Use
Office Land Use
Industrial Land Use
Public Facilities Analysis
Real Estate Market Analysis
Workforce Projections
Demographic Projections
Development Trends / Projections
Site Development Analysis
Financing Strategy
Public-Private Partnership

PROJECT SUMMARY

JS&A worked with Mosaic Urban Partners, Ayers Saint Gross, and multiple city agencies. Including Office of Planning, Department of Public Works, Department of General Services, to develop a Master Plan for a consolidated campus for the DC Department of Public Works (DPW) in a city-owned site redevelopment effort in the Ivy City neighborhood. JS&A led aspects of the project including conducting a land use and real estate market analysis; site development analysis; financing structure; and public-private partnership structure and policy recommendations.

SCOPE DETAIL

Land Use and Market Analysis. JS&A completed a detailed land use and real estate market analysis of multiple land uses including residential, commercial, and industrial land uses, alongside assessing real estate trends in the Sub Area nearby the proposed campus. Findings were assessed to understand the implications of supply-demand and the proposed development scenario and led to site development recommendations.

Labor, Workforce, and Demographic Projections. JS&A conducted areawide Economic Development Projections including Labor, Workforce, and Demographic Projections. These projections assessed the impact of planned, proposed, and under construction development projects in the surrounding sub area to understand anticipated new supply and population anticipated to be in close proximity to the proposed Public Works Master Plan campus.

Jon Stover & Associates, LLC | info@stoverandassociates.com | 202.695.4956 | www.jonstoverandassociates.com

5.4.3 Eastover Sector Plan and Corridor Redevelopment Strategy, St. George's Co., MD (2016)

JON STOVER & ASSOCIATES

Project Profile - Eastover Sector Plan and Corridor Redevelopment Strategy



Client: Prince George's County Planning Department; Maryland - National Capitol Park and Planning Commission

City: Prince George's County, Maryland

Date: 2016

Role: Subconsultant with Cooper Carry

Scope: Comprehensive Sector Plan
Corridor Analysis
Corridor Regeneration Strategy
Revitalization Strategy
Stakeholder Outreach
Sector Plan
Commercial and Retail Strategy
Land Use Analysis

PROJECT SUMMARY

The Sector Plan, a local Comprehensive Plan, for the Forest Heights / Glass Manor area of Prince George's County was conducted on behalf of the Maryland - National Capitol Park and Planning Commission. The Eastover Sector Plan focused on urban and environmental site design, transportation planning, and economic revitalization strategies. JS&A served as Project Manager for the economic revitalization component of the overall project led by Cooper Carry. The team successfully developed a community-supported vision, recommended the ideal mix of land uses, proposed economic incentives and funding strategies, and leveraged regional development activities. Project deliverables included a comprehensive public involvement process, a neighborhood and corridor regeneration strategy, and illustrative design scenarios.

SCOPE DETAIL

Corridor Strategy. The Corridor Revitalization Strategy leveraged the public realm improvements recommended by the planning, design, and engineering consultants as the catalyst to create additional value – and steer development – along targeted portions of the commercial corridor. In addition, the public realm improvement strategy was developed in conjunction with the revitalization strategy, creating a process where initial targeted public investment encourages additional future private investment. The strategy identified the location, timing, and implementation processes for various retail regeneration and attraction recommendations within four cluster areas.

Stakeholder Engagement. The team created a multi-track Engagement Process. Multiple charrettes were held with County officials to receive continual guidance and feedback on the evolution of the analysis and recommendations. The team also conducted Development Roundtables to direct conversations with landowners and managers of particularly important parcels of land.

Jon Stover & Associates, LLC | info@stoverandassociates.com | 202.695.4956 | www.jonstoverandassociates.com

5.4.4 Downtown Lake Worth Arts and Culture Master Plan, Lake Worth, FL (2016-2017)

JON STOVER & ASSOCIATES

Project Profile - Downtown Lake Worth Arts and Culture Master Plan



Clients: Cultural Council of Palm Beach County; the City of Lake Worth, and the Lake Worth Community Redevelopment Authority

City: Town of Lake Worth, FL

Date: 2016 - 2017

Role: Real estate, market analysis, and implementation consultant on team with Lord Cultural Resources

Scope: Residential Market Analysis
Office Market Analysis
Retail Market Analysis
Cultural Land Use Analysis
Community Engagement
Strategy to Attract and Support Cultural Organizations & Users
Economic Development Strategy
Implementation Plan

Client Contact:
Jan Rodusky, Chief Grants Officer
Cultural Council of Palm Beach Co.
Phone: (561) 471 - 2901
Email: jrodusky@palmbeachculture.com

PROJECT SUMMARY

Jon Stover & Associates was selected as part of a team with Lord Cultural Resources to undertake the Downtown Lake Worth Arts and Culture Master Plan. Led by the Cultural Council of Palm Beach County, the Lake Worth Community Redevelopment Authority (CRA), and the City of Lake Worth, the Master Plan aims to leverage a growing local arts scene as a central part of the greater 'downtown' economic development strategy.

SCOPE DETAIL

Market Analysis. JS&A conducted a market analysis that projected town population growth and demographic shifts and projected future supply, demand, and development opportunity for residential, commercial, and civic land uses. The market analysis provided a framework to inform policy, design, and development recommendations for the commercial 'downtown' portion of Lake Worth.

Cultural Enhancement and Economic Development Strategy. Working with the project team, JS&A helped develop four high-priority strategies for supporting and enhancing arts and culture in downtown Lake Worth: (i) establishing an independent nonprofit to provide downtown stakeholder advocacy, support, and coordination; (ii) enhancing Lake Worth's arts-oriented brand; (iii) promoting local arts diversity and increasing exposure; and (iv) encouraging and directing growth in the downtown area.

Implementation Plan. JS&A developed a series of action steps for specific Lake Worth stakeholders to undertake to best capitalize on each key strategic opportunity and achieve the goals and objectives that emerged from this arts and culture master planning process, culminating in an implementation work plan to help guide stakeholders through the implementation process.

5.4.5 Mid City East Small Area Plan, Washington, DC (2013)

JON STOVER & ASSOCIATES

Project Profile - Mid City East Small Area Plan

JS&A Economic
Development
Consulting



Client: DC Office of Planning

City: Washington, DC

Date: 2013

Role: Real estate consultant on project team with Green Door Advisors, HR&A, and Smith Group JJR

Scope: Land Use Analysis
Underutilized Parcel Analysis
Residential Market Analysis
Housing Affordability Assessment
Office, Creative Land Use, and Entrepreneurial Market Analysis
Retail Market Analysis
Corridor Assessment
Demographic Projections
Policy Framework
Community and Business Owner Engagement

Client Contact:

Sakina Khan, Deputy Director for
Citywide Strategy and Analysis
DC Office of Planning
Phone: (202) 442 - 8708
Email: sakina.khan@dc.gov

PROJECT SUMMARY

The Mid City East Initiative is Small Area Plan and Livability Study, with a community led, city planning process, for the neighborhoods of North Capitol Street, Rhode Island Avenue, Florida Avenue, New York Avenue and New Jersey Avenue in Washington, DC. JS&A worked under Green Door Advisors, HR&A, and Smith Group JJR, conducting an in-depth land use analysis, real estate market analysis, development opportunity analysis, affordable housing strategy, vacant and underutilized parcel analysis, and commercial corridor redevelopment strategy.

SCOPE DETAIL

Development Feasibility Analysis. JS&A conducted a detailed market analysis that projected neighborhood population growth and demographic shifts and projected future supply, demand, and development opportunity for land uses including residential, commercial, and civic uses. In addition to the land use analysis and projected future conditions, JS&A assessed housing affordability, the supply of housing units relative to local low-income families, and projected opportunities. Lastly, JS&A developed a framework to inform policy, design, and development recommendations for the Mid City East neighborhoods.

Corridor Existing Conditions and Redevelopment Opportunity. JS&A cataloged the commercial land uses, including retail and office properties, on each of the major commercial corridors in the study area, and incorporated the Office of Planning's Retail Streets Tool Kit in a comprehensive analysis of the current conditions and redevelopment potential of each commercial corridor. JS&A worked directly with local business owners and community residents at seven different meetings, workshops, and presentations.

6.0 Estimated Tasks and Timeframe

The following chart outlines key phases and suggested periods of activities. This timeline reflects the relative emphasis of activity. Work on a number of the key deliverables will occur in parallel. This will allow the phases to be completed within the project timeline.

Key Phases	Key Deliverables/Benchmarks	D	J	F	M	A	M	J	J	A	S
Phase 1: Public Launch	Initial planning and project schedule										
	Review of existing 2005 Comp Plan for Adequacy										
	Develop public engagement and communication plan										
	Public launch to outline the Comp Plan process										
Phase 2: Task Force and Public Engagement work	Create Task Force for each major strategic pillar (from vision process)										
	Review vision process surveys and data										
	Review best practice examples and case studies, drawing from Benchmark report and other sources										
	Task Forces refine community goals and priorities to reflect updated Community Vision										
	Inventory and assessment of issues and opportunities and creative solutions										
	Public Open House sessions and Focus Groups with City Staff to gather community input on Comp Plan sections/elements										
Phase 3: Update Specified Elements of the Comprehensive Plan	Compilation of public input on Comprehensive Plan sections/elements; Summary Report										
	Analysis of Comprehensive Plan Sections										
	Meetings with Planning Department on Comp Plan sections/elements										
	Develop, draft and vet recommendations for the Comp Plan										
	Draft updated Comp Plan to City staff and Council for input										
	Develop and draft Implementation Strategy and Matrix										
	Revisions to Comp Plan and Implementation Strategy										
	Community presentation for final input										
	Implementation Roadmap drafted for approval										
Phase 4: Final Comprehensive Plan	Final version of Smithville Comprehensive Plan										
	Final Community Presentation										

7.0 Tab A: Statement of Qualifications - Team Resumes

7.1 Project Director, David Beurle, CEO, Future iQ

RESUME



DAVID BEURLE

david@future-iq.com

EDUCATION

Bachelor Degree in Agricultural Science,
University of Sydney, 1984

EMPLOYMENT

Founder and CEO Future iQ, USA and
Europe, 2003 – Present

Principal Adviser, Minister for Primary
Industries, Western Australia, 1991 – 2000

Rangeland Scientist, Western Australian
Department of Agriculture, 1985-1991

PHILANTHROPIC WORK

Board Director, Western Australian
Community Foundation, 2003-2005

Founding member, Plant-Based Product
Council, USA, 2019

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DAVID BEURLE, B.Sc., Ph.D.

CEO, FUTURE IQ

As founder and CEO of Future iQ, David is an expert in creating future planning approaches for use in regional, industry and organizational settings. He has pioneered the application of scenario planning with regions, regional industries and corporations around the world. David created the Future Game, a widely used planning and workshop tool that has been used in over 500 workshops across 10 countries. As CEO of Future iQ, David has led global projects across 4 continents and has written and contributed to a number of foresight papers. Having worked in the field of organizational and regional economic and community planning for over 20 years, his work has won numerous awards. David has a major role in Future iQ's projects as lead consultant and director of projects.

RECENT PROJECT EXPERIENCE

- New England Regional Defense Industry Collaboration, New England, 2019
- Park City Community Vision and Strategic Action Plan, UT, 2019
- Clearwater Economic Development Association, ID, 2019
- City of Mitchell Community Vision and Action Plan, SD, 2019
- ECC Medical/Well-Being Strategic Marketing Plan and Economic Development Plan, MN, 2016-2019
- Tillamook County Strategic Vision and Action Plan, Oregon, 2018-2019
- National Association of Development Organizations, Washington, D.C., 2018-2019
- Future of Urban Living Think Tank, St Georges House, Windsor Castle, UK, 2018-2019
- Middle Georgia Regional Defense Industry Economic Diversification Project 2017 - 2018
- City of Coppell, Texas, Community Visioning 2018 - 2019
- Snohomish County, Washington, Tourism Implementation Plan 2017 - 2018
- Maine Woods, Tourism Impact Study 2017 - 2018
- City of San Diego Defense Industry Economic Development Plan, California, US, 2016 - 2018
- North Coast, Oregon, Tourism Destination Management, 2018 - 2019
- Hilton Head Island, South Carolina, Community Visioning project, 2016 - 2017
- Task Force LIMA Defense Initiative, Ohio, US, 2015 - 2017
- National Congress of American Indians, Future Game development, 2016 - 2018
- City of Wayzata, Minnesota, US, Community Visioning 2017 - 2018
- Moosehead Lake Regional Master Plan, Maine, US, 2016 - 2017
- Edina Economic Development Plan, Minnesota, US, 2016
- Oregon Regional Tourism Planning US, 2015 - 2016
- Columbia River Gorge, Oregon, US, 2015 - 2016
- Griffith Foods Scenario Planning Chicago, US, 2016
- Mediterranean PORTS EU Projects Italy/France, 2015
- Fox Valley Defense Industry Adjustment, Wisconsin, US, 2014 - 2015
- Texarkana Defense Project, Texas, US, 2015
- Vision Edina, Minneapolis, US, 2014 - 2015
- Australian Grain Research and Development Corporation, Western Australia, 2008 - 2015
- Vadinia Project, Leon, Northern Spain, 2014
- Agriparco Montespertoli, Tuscany, Italy, 2014
- Govt. of Alberta Small Business Strategy, Canada, 2013
- Steering it Forward North East Nevada, US, 2013
- Mount Pierre Project, Australia, 2013
- Kewaunee Economic Adjustment Project, Wisconsin, US, 2013
- Global Think Tank, Windsor Castle, UK, 2012
- Future West Cork, Ireland, 2009 - 2012
- Palliser Futures Project, Alberta, Canada, 2009
- Winnemucca Futures Project Nevada, US, 2009

RECENT PUBLICATIONS

- The Future of Urban Living, 2019
- Future of Tourism, 2018
- The Next Industrial Revolution, 2018
- The Future of Midwest Agriculture, 2017 - 2018
- The Future of Manufacturing, 2016
- The Future of Food, 2016
- Economics of Collaboration, 2015
- Cities of the Future, 2015
- Building Sustainable Regional Communities, Windsor Castle, UK, 2012
- The Futures Game: A Scenario game Workshop Package to Engage Future Thinking, 2009
- Development of a Process to Turn Plausible Scenarios into On-Ground Action, 2009

7.2 Celine Beurle, COO, Future iQ

RÉSUMÉ



CELINE BEURLE

celine@future-iq.com

EDUCATION

Masters Degree in Sociology
University College Cork, 1998

B A Hons Degree in Sociology/Philosophy
University College Cork, 1996

B A Hons Degree Sociology
University of Warwick, 1995

EMPLOYMENT

C O O, Future iQ

USA and Europe, 2012 - Present

Managing Director Future iQ Europe, Ltd
Europe, 2017 - Present

Manager, Govt. Employment Service
Ireland, 2003 - 2012

Animal Welfare Policy Chair
Green Party Ireland, 2003 - 2009

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CELINE BEURLE, CEO, FUTURE IQ

With an academic background in Sociology and Philosophy, Celine is passionate about understanding society and this has led to her ongoing interest in pursuing societal change. She has drawn upon her research background, to write policy and scientific papers. She was sole Policy writer for a key area, for one of the main political parties in Ireland, and was successful in having it subsequently included in the national policy platform, when the party went into government. With a background in running companies and projects, Celine brings many years of experience in both leading and expanding a company. As Chief Operating Officer of Future iQ, Celine has expanded the geographical reach of the company to encompass South America, Italy, Spain and the United Kingdom. This role also involves working with the CEO on the strategic direction of Future iQ and communications within the company. Celine is also Managing Director of the European branch of Future iQ. She works on projects both in a project management role and with regards to the communication planning of all projects. Celine was project manager for the successful Future of Urban Living consultation that Future iQ held at St George's House, Windsor Castle in December 2018.

RECENT PROJECT EXPERIENCE

- New England Regional Defense Industry Collaboration, New England, 2019
- Park City Vision 2020, Utah, 2019
- City of Smithville Strategic Planning, Missouri, 2019
- Tillamook County Strategic Planning, Oregon, USA, 2019
- The Future of Urban Living consultation, Windsor Castle, UK, 2018
- Middle Georgia Charette and Regional Planning Initiative, Georgia, USA, 2018
- Coppel Vision 2040, Texas, USA, 2018
- Hilton Head Island Visioning, South Carolina, US, 2017
- La Laguna Regional Planning, Tenerife, Spain, 2017
- Greater Lima Region, Ohio, US 2016-2017
- Griffith Foods Planning Project, Chicago, US, 2016
- Task Force LIMA Defense Initiative Ohio, US, 2015 - 2017
- Edina Economic Development Plan Minnesota, US, 2016
- Oregon Regional Tourism Planning, US, 2015-2016
- Columbia River Gorge, Oregon, US, 2015-2016
- Griffith Foods Scenario Planning Chicago, US, 2016
- Mediterranean PORTS EU Projects Italy/France, 2015
- Fox Valley Defense Industry Adjustment, Wisconsin, US, 2014-2015
- Vision Edina, Minneapolis, US, 2014- 2015
- Australian Grain Research and Development Corporation, Western Australia, 2008-2015
- Vadinia Project, Leon, Northern Spain, 2014
- Agriparco Montespertoli, Tuscany, Italy, 2014
- Govt. of Alberta Small Business Strategy Canada, 2013
- Global Think Tank, Windsor Castle, UK, 2012

RELEVANT PUBLICATIONS

- Park City Vision 2020 Think-Tank Report, 2019
- The Next Industrial Revolution, FIQ Foresight Report, 2018
- Vision 2040 Community Engagement Report, 2018
- Middle Georgia Charette and Regional Planning Stakeholder Engagement Report, 2018
- Hilton Head Island - Our Future Think Tank Report, 2018
- Hilton Head Island - Our Future Stakeholder Engagement Report, 2018
- Vision 2040 Think Tank Report, 2018
- Middle Georgia Charette and Regional Planning Think Tank Report, 2018
- The Next Industrial Revolution, 2017
- Future iQ Project Communication Plan - Framework and Approach, 2017
- Greater Lima Region Stakeholder Ecosystem Analysis, 2017
- Economic Development in Edina Stakeholder Analysis, 2017
- Griffith Foods Stakeholder Analysis Report, 2017
- An Exploration of Focus Group Methodology, 2016
- The Future of Food, 2016
- Grains Industry Network Mapping Report, 2015
- Agriparco Montespertoli Scenario Planning Report, 2014
- Green Party Animal Welfare Policy and Research Paper, 2009

7.3 Heather Branigin, Vice President, Foresight Research, Future iQ

RESUME



EDUCATION

Master of Arts in Teaching
Secondary Level, Social Studies
University of St. Thomas, MN

Bachelor of Arts in Political Science/
International Relations
Advanced Language Certificate: French
Literature
Carleton College, MN

Honours Degree, Neuchâtel Jr. College
Neuchâtel, Switzerland

EMPLOYMENT

Vice President, Foresight Research,
Future iQ, 2016-present

City of Edina, MN, 2013-2016

NCCA - National Model United Nations
Minneapolis, MN, 2010-2013

UNA-MN, St. Paul, MN, 2007-2010

PHILANTHROPIC WORK

Bd. Member, Caring for Cats, present

Vol Judge, Future City Comp., 2017

Adv. Council Member, UNA-MN
2014-present

Co-President (2011-2013), Bd. Member
(2010, 2014) UNA-MN

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HEATHER BRANIGIN,

Heather began work with Future iQ in 2015 as primary researcher and author of Future iQ's foresight publication *The Future of Food*, and recently co-authored *The Future of Urban Living* and *The Next Industrial Revolution*. She has extensive experience in local government and the nonprofit sector, and is an accomplished project manager and research analyst. Heather has a well-developed ability to assimilate information into thoughtful and coherent writing. She applies the integration of future trends, data analysis and public engagement into implementable strategy development for clients. Through her work, Heather seeks to provide that critical resourceful guidance needed to empower communities and organizations to make decisions that build sustainability and resiliency as they face a future of accelerations and change. Originally from Canada, Heather has pursued her international interests through her philanthropic work with the United Nations Association of Minnesota.

RECENT PROJECT EXPERIENCE

- Kinship Fellows and Food/Land/Opportunity Grantees Summit, Chicago, IL, 2019-Present
- City of Trotwood Organizational Strategic Plan, OH, 2019-Present
- New North Business Intelligence Strategic Action Plan, WI (2019)
- New England Collaborative, DoD-OEA (2019)
- City of Mitchell Community Vision and Action Plan, SD, 2019-Present
- Future of Urban Living Global Consultation at Windsor Castle, UK, 2018
- CEDA, ID, 2019
- Sustainable Materials Management - Vision for Iowa, Iowa DNR, 2018-Present
- Tillamook County Strategic Vision and Action Plan, OR, 2018-2019
- ECC Medical/Well-Being Strategic Marketing Plan and Econ Dev Plan, MN, 2016-2019
- NADO, Washington, D.C., 2018-2019
- Coppell Vision 2040, Coppell, TX, 2018-2019
- City of San Diego, OEA Grant Facilitation, San Diego, CA, 2016-2019
- Snohomish County Regional Tourism Destination Development, WA, 2018
- McHenry County College, Crystal Lake, IL, 2018
- Rural Community Assistance Partnership, Washington, D.C., 2018
- Wayzata Community Vision, MN, 2017-2018
- NHADEC, NH, 2017-2018
- Waseca Vision 2030, MN, 2017-2018
- Edina Nodes and Modes Bridging Sessions, Edina, MN, 2017
- Scott County Visioning and Scenario Planning, MN, 2017
- CAP-HC Vision and Strategic Action Plan, St. Louis Park, MN, 2017
- Task Force LIMA Defense Initiative, Allen County, OH, 2016-2017
- University of Minnesota, Future of Midwest Agriculture, MN, 2016-2017
- Town of Hilton Head Island Vision and Strategic Action Plan, SC, 2016-2017
- City of Edina, Vision Edina, MN, 2014-2015

RELEVANT PUBLICATIONS

- IDNR Strategic Vision for Iowa, 2019
- Trotwood Think-Tank Report, 2019
- New England Collaborative Think-Tank Report, 2019
- NADO Strategic Action Plan, 2019
- Edina Med/Wellbeing Dest Marketing Strategic Plan, 2019
- CEDA Think-Tank Report, 2019
- Tillamook Co Think-Tank Report 2019
- *The Future of Urban Living*, 2019
- Coppell Vision 2040 Strategic Action Plan, 2019
- *The Future of Tourism*, 2018
- McHenry Co Coll Strategic Foresight Session, 2018
- *The Next Industrial Revolution*, 2018
- Waseca Vision 2030 Strategic Action Plan, 2018
- NHADEC Strategic Action Plan, 2018
- Snohomish Co Tourism Industry Reports, 2018
- Scott County Planning Reports, 2017
- Propel San Diego Think-Tank Report, 2017
- Edina Chamber Econ Dev Strategy, 2017
- Innovation Framework for Greater Lima Region, 2016
- *The Future of Food*, 2016

HEATHER BRANIGIN

heather@future-iq.com

7.4 Jon Stover, Managing Director, JS&A



Jon Stover, Managing Partner

Jon Stover is the founder and Managing Partner of Jon Stover & Associates. He specializes in helping communities shape visions for their future based on current conditions and local assets. Jon provides real estate market analysis, fiscal and economic impact analysis; and economic development strategies for a range of clients. Stover has secured, planned, and directed hundreds of projects working for and partnering with county agencies, city departments, community groups, non-profit organizations, universities, neighborhood stakeholder organizations, real estate developers, and private business owners.

Education

*University of Pennsylvania
Masters of Urban Planning
School of Design*

*Certificate in Real Estate Development
Wharton School of Business and
School of Design
(Joint Program)*

Speaking Engagements

"Tips for Measuring the Impact of Your Program." Downtown Pennsylvania Conference, Pennsylvania Main Streets (2019)

"Building Resiliency on Main Street." Main Street NOW, Seattle (2019)

"Breaking the Black Box of Economic Impact." Main Street NOW, Seattle (2019)

NPR's All Things Considered, Guest Interview (2018)

"Using Data to Bolster Decision Making." Tennessee Retail Summit, Tennessee Main Streets (2018)

"Quantifying the Nighttime Economy in Your City." Sociable City Summit, New Orleans (2018)

"Local and National Retail Trends: How Can We Help Businesses Compete Now and in the Future." DC Main Street Executive Director Training (2018)

"Understanding the Economic and Fiscal Impact of Your Programs." Neighborhoods USA Conference (2017)

Relevant Project Experience

Real Estate Analysis to Inform Prince George's County-Wide Zoning Rewrite | Prince George's County, Maryland, Maryland-National Capitol Parks and Planning Commission

Kansas City Urban Redevelopment Strategy | Kansas City, Missouri
Greater KC Local Initiatives Support Corporation

Buford Highway Masterplan Real Estate & Demographic Analysis | Atlanta, Georgia
Atlanta Regional Commission, City of Chamberlee, and City of Doraville

Old South Baton Rouge Economic Development Plan | Baton Rouge, Louisiana
Center for Planning Excellence, Arts Council

Downtown East Re-Urbanization Strategy and Small Area Plan | Washington, DC
DC Office of Planning

Reunion Square Catalytic Impact Assessment TIF Financing Analysis | Washington, DC
Four Points, LLC

Nighttime Economy Impact Assessment Best Practices and Recommendations
Responsible Hospitality Institute

Mid City East Small Area Plan | Washington, DC
DC Office of Planning

Lake Worth Arts and Cultural Economic Development Strategy | Lake Worth, Florida
Lake Worth Community Redevelopment Association

Economic Generators and Catalyst Study | Prince George's County, Maryland
Maryland – National Capitol Park & Planning Commission

Eastover Sector Plan Redevelopment Strategy | Forest Heights, Maryland
Maryland – National Capitol Park and Planning Commission

Southwest Neighborhood Plan | Washington, DC
DC Office of Planning

Economic and Fiscal Impact Study of Hershey Corporation and Tourism | Hershey, Pennsylvania, RDS, WTL+a, Hershey Corporation

CHASE Action Agenda | Washington, DC
DC Office of Planning, DC Department of Housing and Community Development

7.5 Leslie Deacon, Project Manager, AICP, JS&A



Leslie Deacon, AICP, Senior Consultant | Project Manager

Leslie Deacon, AICP, specializes in the intersection between physical and land use planning, economic analysis, and community development. Her professional expertise includes zoning and land use analysis, real estate market analysis, economic development strategies and impact analysis, and site feasibility studies. As her work spans from parcel specific to nationwide studies, Ms. Deacon leverages her background in architecture and urban planning to provide communities with insights on planning for projected changes and leveraging local assets and competitive advantages through master planning and land use consulting services.

Education

*Columbia University
Masters of Science
in Urban Planning*

*University of Cincinnati
Bachelor of Science
in Architecture*

Affiliations

*American Institute of
Certified Planners
American Planning Association
Commercial Real Estate Women*

Speaking Engagements

*"Tips for Measuring the Economic
Impact of Programs and Initiatives"
Great Lakes Main Street Conference
(2019)*

*"Breaking the Black Box of Economic
Impact." Main Street NOW,
Seattle (2019)*

*National Main Street Center Training
Webinar with Main Streets (2018)*

*"Growth and Adaptation of a Main
Street." Main Street NOW,
Kansas City (2018)*

*"The Numbers Are In. Learn the
Economic Impact of Your Main Street
Program." Main Street NOW, Pittsburgh
(2017)*

*"The Power of Tracking Your Main
Street's Economic Performance." Main
Street NOW, Milwaukee (2016)*

Experience

*Land Use Planner
Bayer Becker
Cincinnati, Ohio*

Relevant Project Experience

Lake Worth Arts and Cultural Economic Development Strategy | Lake Worth, Florida
Lake Worth Community Redevelopment Association

Downtown East Small Area Plan | Washington, DC
DC Office of Planning

Middlebury Downtown Master Plan | Middlebury, Vermont
Town of Middlebury

Reunion Square Catalytic Impact Assessment TIF Financing Analysis | Washington, DC
Four Points, LLC

Buford Highway Masterplan Real Estate & Demographic Analysis | Atlanta, Georgia
Atlanta Regional Commission, City of Chamberlee, and City of Doraville

Hechinger Mall Visioning and Impact Analysis | Washington, DC
H Street Main Street

Cleveland Park Strategic Plan | Washington, DC
DC Deputy Mayor's Office of Economic Development and Planning

Streetcar Ridership Economic Impact Analysis | Washington, DC
H Street Main Street

Economic and Fiscal Impact Study of Hershey Corporation and Tourism | Hershey, Pennsylvania, RDS, WTL+a, Hershey Corporation

Re-imagining Reeves Market Study and Development Opportunity Assessment | Washington, DC, DC Office of Planning, DC Deputy Mayor's Office of Planning and Economic Development

Indian River Lagoon Impact Assessment | St. Lucie County, Florida
WTL+a, Treasure Coast Regional Planning Council

Aberlin Springs Residential Master Plan | Greater Cincinnati, Ohio
North Pointe Group, Pendragon Homes

Reading Road Corridor Master Plan | Mason, Ohio
*City of Mason**

**Projects conducted while at Bayer Becker.*

8.0 Tab B: Project References

In addition to the project contacts in Section 5.1, below are four recent project contacts for Future iQ that may be used as references for this project. All are aware that they may be contacted as references for Future iQ. Additional references may be provided as needed.

Coppell Vision 2040 and Strategic Plan, Texas (2018-2019)	Traci E. Leach Deputy City Manager 225 E. Parkway Blvd. City of Coppell, TX Tel: 972-304-3672 Email: TLeach@coppelltx.gov
Nodes and Modes – Bridging Vision to the Comp Plan, City of Edina, Minnesota (2017)	Mike Fischer, Edina Council Member City of Edina 4801 W. 50 th Street Edina, MN 55424 Tel: 612-752-6920 Email: mike.fischer@lhbcorp.com
Vision Edina, Edina, Minnesota (2014-2015)	Scott Neal, City Manager City of Edina 4801 W. 50 th Street Edina, MN 55424 Tel: 952-826-0401 Email: sneal@edinamn.gov
National Association of Development Organizations (NADO), Strategic Action Plan, Washington, D.C. (2018-2019)	Joe McKinney, Executive Director National Association of Development Organizations 400 N. Capitol Street, NW, Ste. 388 Washington, D.C. 20001 Tel: 202-624-8813 Email: jmckinney@nado.org

Below are two recent project contacts for Jon Stover and Associates that may be used as references for this project. Additional references may be provided as needed.

Evelyn Kasongo Lead Planner for Equity Initiatives, Neighborhood Planning District of Columbia Office of Planning (202) 442-7619 Evelyn.kasongo@dc.gov 1100 4 th Street SW, Suite E650 Washington, DC 20024	Cristina Amoruso DC Main Streets Coordinator District of Columbia Department of Small and Local Business Development (202) 701-7673 Cristina.amoruso@dc.gov 441 4 th Street NW, Suite 850N Washington, DC 20001
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9.0 Tab C: Anticipated Fee Schedule and Hourly Rates

Please see separate attachment in sealed envelope.

10.0 Appendix A: Detailed Project Descriptions

Following are the detailed project descriptions from relevant experience in Section 5.2.

- **City of Smithville, MO, Community Vision and Strategic Action Plan (2019-present).** Future iQ was recently engaged by the City of Smithville to guide the visioning and strategic planning process for the City. The process will involve a benchmark report and communications plan, a Think-Tank and Scenarios of the Future Report, extensive community stakeholder engagement, data visualization, and the production of a Strategic Action Plan. <https://future-iq.com/project/city-of-smithville-missouri-usa-2019/>
- **City of Mitchell, SD, Community Vision and Strategic Action Plan (2019-present).** Future iQ was recently engaged by the City of Mitchell to develop a community vision and strategic action plan for the City. The project will involve a public project launch, Benchmark Report, Think-Tank, extensive community and stakeholder engagement, data collection, analysis and visualization, as well as a strategic action plan with a roadmap and key measures for success. <https://future-iq.com/project/city-of-mitchell-south-dakota-usa-2019/>
- **Park City, UT, Community Vision 2020 (2019-present).** Future iQ was recently engaged by Park City to develop a community vision and action plan for the City. The project will involve a Think-Tank, extensive community and stakeholder engagement, data collection, analysis and visualization, as well as an action plan with a statement of community ideals and core values. <https://future-iq.com/project/park-city-vision-2030-utah-usa-2019/>
- **City of Trotwood, OH, Organizational Strategic Plan (2019-present).** The City of Trotwood engaged Future iQ to develop the next 5-year organizational strategic plan for the community of Trotwood. The project will include background research, facilitation of a Think-Tank, extensive community engagement, community surveys, Scenarios of the Future Report, focus groups, and a roadmap with implementation toolkits. <https://future-iq.com/project/city-of-trotwood-ohio-usa-2019/>
- **Moosehead Lake Regional Master Plan, Maine (2016-2017).** Future iQ was engaged to create a comprehensive regional master plan for the Moosehead Lake region of Maine. The project involves asset mapping of the region's physical, financial and political capital to inform recommendations for regional land use and infrastructural improvements. This project focused on workforce development, economic diversification, recreational tourism development, guiding visitor flow patterns and building a year-round tourism economy. <http://future-iq.com/project/moosehead-lake-region-maine-usa-2016-17/>
- **Iowa DNR, Sustainable Materials Management - Vision for Iowa (2018 – 2019)** The Iowa DNR contracted with Future iQ, in partnership with the engineering firm of Burns & McDonnell, to facilitate a series of DNR stakeholder meetings and research that led to the creation of a strategic vision that serves as a statewide guide to make the transition from solid waste management to sustainable materials management for the State of Iowa. <https://future-iq.com/project/iowa-department-of-natural-resources-iowa-usa-2019/>
- **Tillamook County, OR, Strategic Vision and Action Plan (2018-2019).** Future iQ was contracted to lead the county in the development of a strategic vision for how to manage tourism from a facilities perspective. The goal was to develop a decision-making tool that will inform tourism-related facility investments and guide grant program investments with

the purpose of applying resources to identified priority projects that support the overall Strategic Vision. The project involved a situational analysis, Think-Tank, stakeholder engagement and data analysis resulting in a Strategic Vision and Action Plan. <https://future-iq.com/project/tourism-investment-strategic-action-plan-project-oregon-usa/>

- **National Association of Development Associations, Washington, D.C. (2018).** Future iQ was engaged to provide strategic visioning and planning guidance that will serve to strengthen existing nationwide capacity of the organization and provide a roadmap to new opportunities for future growth. The new Strategic Plan will aim to drive organization-wide consensus on collaborative strategic initiatives that will guide decision-making for NADO and its Foundation for the next five years. <https://future-iq.com/project/national-association-development-organizations-nado-nado-research-foundation/>
- **McHenry County College, IL, Strategic Visioning and Foresight (2018).** McHenry County College is examining the county ecosystem to help inform the College as it prepares for an internal strategic planning effort. Future iQ was engaged to provide strategic visioning and planning guidance that will position the College as a ‘thought-leader’ in the community and produced a strategic foresight document that would examine future evolution in the County. <https://future-iq.com/project/mchenry-county-college-crystal-lake-illinois-2018/>
- **Edina Chamber of Commerce Medical/Wellness Destination Strategic Marketing Plan, Edina, MN (2018-2019).** Future iQ was engaged to support the Edina Chamber of Commerce’s strategic plan development by creating a roadmap to develop an innovative, vibrant, regional medical/wellbeing destination in Edina. The project involved significant research on centers of excellence, innovation hub potential, and educational opportunities for the community. The resulting roadmap produced recommendations for implementation of the destination strategic marketing plan. <https://future-iq.com/project/medical-well-destination-strategic-marketing-plan-edina-minnesota-2018/>
- **Clearwater Economic Development Association, ID, Visioning and Economic Development Leadership Training (2019).** Future iQ was contracted to provide economic development training services through a program funded by the USDA Rural Community Development Initiative. The intent of the project is to increase recipient capacity for preserving community assets and to increase community wealth through a set of sound economic development principles and effective comprehensive planning and development. <http://future-iq.com/project/clearwater-economic-development-association-usa-2019/>
- **Global Think-Tanks at Windsor Castle, U.K. (2012 and December 2018).** In 2012, Future iQ hosted a global Think-Tank forum at Windsor Castle on ‘Building Sustainable Regional Communities.’ The event explored a series of key questions critical to building the future of regional economies and communities. Future iQ hosted an additional global Think-Tank at Windsor Castle in December 2018 to explore ‘The Future of Urban Living’. Global experts from gathered at the 2018 Think-Tank to discuss and debate future trend and impacts on urban living worldwide. <http://future-iq.com/project/global-think-tank-windsor-castle/>
- **Community Action Partnership of Hennepin County, MN (2017).** Future iQ was contracted to lead the development of a comprehensive organizational Strategic Plan to establish services, programs and partnerships to address poverty and increase family and economic stability within Hennepin County communities. The project involved scenario planning and

stakeholder engagement, research analysis and the production of an Implementation Action Plan as part of the final Strategic Plan. <http://future-iq.com/project/community-action-partnership-hennepin-county-minnesota-usa-2017/>

- **Future of Midwest Agriculture, University of Minnesota, MN (2016-present).** Future iQ is working on a collaborative research project with the U of MN to explore the 'Future of Midwest Agriculture', including the sustainable intensification of Midwest agriculture through the use of scenario planning. Anticipated outcomes include a more in-depth understanding of plausible futures for U.S. Midwest agriculture and how the role of these narratives promote cooperation and innovation in the industry, as well as the development of a broad vision and strategic plan for a new agricultural bio-economy in the Midwest. <http://future-iq.com/project/u-s-midwest-agriculture-scenarios-future-2016-17/>
- **Travel Oregon, Oregon (2009-present).** Travel Oregon embarked on a regional tourism planning process and has contracted with Future iQ to assist with the development of a regional tourism planning framework, connecting regional plans together and linking them to the overall Travel Oregon strategic plan. This included stakeholder planning and visioning sessions in all 7 major regions across Oregon. The results of this project produced a strategic vision and action plan for each region in relation to the overall planning framework. <http://future-iq.com/project/oregon-regional-tourism-planning-usa/>
- **Maine Woods Tourism Development, ME (2017-2018).** Future iQ worked with a consortium of organizations to explore the tourism and economic development potential in the Maine Woods area. This project covers most of Maine, and includes 7 regional areas, primarily to the west of the coastline. The work included exploration of the potential economic impacts of tourism, and research on important emergent trends shaping outdoor and recreation tourism sectors. <http://future-iq.com/project/maine-woods-usa-2018/>
- **North Tyrrhenian Sea Mediterranean Ports Project, Italy/France (2015).** Future iQ was contracted to implement a future oriented scenario-planning methodology with broad cross-sectional representatives from various port cities within four large sub-regions producing individual planning reports for each region. The four studies were compiled in a Joint Analysis Report and presented as part of the Strategic Plan of the port cities of the North Tyrrhenian Sea. <http://future-iq.com/project/mediterranean-sea-ports-project/>
- **Edina Chamber of Commerce Economic Development Strategy, Minnesota (2016-2017).** Future iQ was engaged by the Edina Chamber of Commerce to develop a new economic development strategy that it could use over the next ten years. This research produced a complete economic profile and industry cluster analysis of Edina, a stakeholder engagement analysis, and a recommended economic development strategy and implementation plan covering the next 1, 5 and 10 years. <http://future-iq.com/project/economic-development-plan-edina-minnesota/>
- **Province of Alberta, Small Business Strategy, Canada (2009-2014).** Future iQ worked with the Government of Alberta on a range of transformational projects including regional planning, developing, and facilitating the development of the Small Business Strategy, Research and Facilitation publications and Regional Workshops as part of the Service Provider Network for the Province. <http://future-iq.com/project/regional-and-economic-development-in-alberta/>

11.0 Appendix B: Additional Team Resumes

11.1 Johanna Hoffman, Sr. Foresight and Planning Specialist, Future iQ

RESUME



EDUCATION

MLA Landscape Architecture & Environmental Planning, University of California, Berkeley, CA

BA Creative Writing and Environmental Studies, Oberlin, Oberlin, OH

EMPLOYMENT

Senior Project Manager and Design Specialist, MKThink, San Francisco, CA, 2018 - Present

Founder & Lead Designer, Shiftworks, Berkeley, CA, 2016 - 2019

Resilient Design Associate, Urban Fabrick, San Francisco, CA, 2016 - 2017

Coastal Sustainability Studio Fellow, Louisiana State University, Baton Rouge, LA, 2016

Designer & Researcher, The Open Workshop, San Francisco, CA, 2015

Landscape Designer, Terrain Studio, San Francisco, CA, 2014

Co-Editor and Director, GroundUp Journal, UC Berkeley, 2012 - 2013

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JOHANNA HOFFMAN,

Johanna Hoffman is an award-winning urban designer, foresight practitioner and strategic planner focused on helping cities, communities and organisations create more adaptive futures. She holds a Masters degree in Landscape Architecture and Environmental Planning and a Bachelor's degree in Environmental Science and Creative Writing. She uses her 10+ years of experience to help clients navigate dynamic change through comprehensive plans and interactive engagement strategies. Data visualisation, strategy, qualitative and quantitative research all form important aspects of her work. She has lectured and presented at institutions from University California Berkeley and the Yerba Buena Center for the Arts to the Rhode Island School of Design and the Massachusetts Institute of Technology. Recent clients include the University of Hawaii, the Oakland Unified Planning District and the San Francisco International Airport.

RECENT PROJECT EXPERIENCE

- Senior Project Manager and Design Specialist, MKThink, San Francisco, CA, 2018 - Present
- Founder & Lead Designer, Shiftworks, Berkeley, CA, 2016 - 2019
- Resilient Design Associate, Urban Fabrick, San Francisco, CA, 2016 - 2017
- Coastal Sustainability Studio Fellow, Louisiana State University, Baton Rouge, LA, 2016
- Designer & Researcher, The Open Workshop, San Francisco, CA, 2015
- Landscape Designer, Terrain Studio, San Francisco, CA, 2014
- Co-Editor and Director, GroundUp Journal, UC Berkeley, 2012 - 2013
- Designer & Researcher, Hood Studio, Oakland CA, 2011 - 2013
- Research Associate, Arava Institute, Israel, 2010
- Research Associate, Oberlin College, Oberlin, OH, 2009
- Research Coordinator, Perry Institute of Marine Science, Exumas, Bahamas, 2008
- Researcher, RV Heraclitus, Polynesia, 2004

RELEVANT PUBLICATIONS

- "Overlooking Risk Until It's Too Late is No Longer An Option." Smart Cities Dive, 2017
- "Incremental Development." World Landscape Architecture, 2015
- "5 Cities That Will Benefit from Climate Change." Next City, 2014
- "In Iceland's resilience, a lesson for us as our world shifts." The Daily Climate, 2014
- "Better Red Than Dead." Earth Island Journal, 2011
- "Grow Wetlands Fight Global Warming?" The Ecology Center, 2010

PROFESSIONAL AFFILIATIONS

American Society of Landscape Architects
Yerba Buena Center for the Arts
San Francisco Urban Planning Research
The European Futures Observatory

JOHANNA HOFFMAN
johanna@future-iq.com

11.2 Walter Paixao-Cortes, Data Engineer, Future iQ

RESUME



EDUCATION

Doctorate in Computer Science (Bioinformatics/
Natural Language Processing)

Pontifical Catholic University of Rio Grande do
Sul, 2015 to present

Masters Degree in Computer Science
(Bioinformatics)

Pontifical Catholic University of Rio Grande do
Sul 2013 – 2015

Bachelors Degree in Computer Science
Pontifical Catholic University of Rio Grande do
Sul, 1995 – 2002

EMPLOYMENT

Data Engineer – Future IQ (2017 – present)

Senior Software Engineer – Dell Computers,
Brazil (2000 – present)

Software Engineer – Accenture, Brazil (2003 –
2005)

WALTER R. PAIXÃO-CÔRTEZ,

DATA ENGINEER, FUTURE IQ

Walter is a senior software engineer with 24 years of experience in the software development industry, working across different domains including Human Resources, Finance and Product Engineering. He has expertise in data analysis, creating ETL pipelines, building data visualizations in many different technologies (SAP Business Objects, Oracle BI Enterprise Edition, QlikView and Tableau), and has experience in working with high data volumes to extract insights. Walter has an academic background in Computer Science with a Masters in Bioinformatics, and a Doctorate (in progress) in Bioinformatics with a minor in Natural Language Processing.

RECENT PROJECT EXPERIENCE

- Mitchell Forward 2040, South Dakota, 2019
- Park City Vision 2020, Utah, USA, 2019
- New England Regional Defense Industry Collaboration Initiative, USA, 2019-2020
- City of Smithville Visioning and Strategic Action Plan project, Missouri, USA, 2019
- Tillamook County Strategic Planning, Oregon, USA, 2019
- Snohomish County Regional Tourism Destination Development, WA 2018
- McHenry County College, Crystal Lake, IL 2018
- Middle Georgia Charrette and Regional Planning, Georgia 2018
- Coppell Vision 2040, Coppell, Texas, 2018
- Rural Community Assistance Partnership, Washington D.C. 2018
- Wayzata Community Vision, Wayzata, MN 2017-2018
- Hilton Head Island Our Future, South Carolina 2017-2018

WALTER R. PAIXÃO-CÔRTEZ

walter@future-iq.com

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11.3 Tobiloba Adaramati, Data Analyst, Future iQ

RESUME



EDUCATION

B Tech. (First Class) Degree
in Mathematics Education

Federal University of Technology, Minna, 2015

N.C.E Degree in Computer and Mathematics

Federal College of Education
(Technical), Akoka, 2011

EMPLOYMENT

Data Analyst, Future iQ
USA and Europe, 2017 – Present

Results Measurement Expert, JMSF
Agribusiness, Nigeria, 2018 – Present

CEO, Growth Analytics Consulting
Nigeria, 2017 – Present

Monitoring and Evaluation Analyst,
Solina Group, Nigeria, 2016 – 2017

Research Analyst, Solina
Group Nigeria, 2015 – 2016

TOBILOBA ADARAMATI, B Tech (Edu)

Data Analyst

Tobiloba Adaramati is a mathematician who sees the beauty in data. She is an expert in data processing, opinion mining, sentiment and reputation analysis. Through her unique perspective, Tobiloba sees each data point as a unique part of a puzzle which put together correctly, creates a clear picture. She uses various forms of data to provide valuable insights and reveal underlying trends. Her background includes a first-class degree in mathematics and experience providing monitoring and evaluation services for international development programs. Tobiloba has worked with Future iQ since 2017, providing data and analytics expertise.

RECENT PROJECT EXPERIENCE

- Mitchell Benchmark Analysis Report, 2019
- Smithville Benchmark Analysis Report, 2019
- Edina Medical Cluster Analysis, 2019

RELEVANT PUBLICATIONS

- Wayzata Benchmark Analysis Report, 2017
- Wayzata 2040, Sailing Ahead, Minnesota, US 2017
- Coppell Vision 2040 Project, Texas, US, 2018

TOBILOBA ADARAMATI

tobiloba@future-iq.com

11.4 Aaron King, Consultant, JS&A



Aaron King, Analyst

Aaron King has successfully completed projects relating to impact assessments, market analyses, development feasibility and positioning, commercial district revitalization, and local business support strategies. Mr. King combines his background in public policy and community development to engage with stakeholders, collect and analyze data, and craft actionable strategies for a range of public and private sector clients, which have included government agencies, real estate developers, economic development corporations, and community development nonprofits.

Education

*University of Delaware
Bachelor of Arts in Public Policy,
Urban Policy, Planning, and Historic
Preservation Concentration*

Speaking Engagements

*"Building Retail Resiliency on Main
Street." Main Street NOW, Seattle
(2019)*

*"Growth and Adaptation of a Main
Street." Main Street NOW,
Kansas City (2018)*

Experience

*Co-Founder & Director
Better Block Wilmington
Wilmington, DE*

Relevant Project Experience

Middlebury Downtown Master Plan | Middlebury, Vermont
Town of Middlebury

Fiscal Impact Analysis of Connected City Master Plan | Pasco County, Florida
WTL+a, Pasco County

MidCity East Small Area Plan | Washington, DC
DC Office of Planning

Lake Worth Arts and Cultural Economic Development Strategy | Lake Worth, Florida
Lake Worth Community Redevelopment Association

Reunion Square Catalytic Impact Assessment TIF Financing Analysis | Washington, DC
Four Points, LLC

Tennessee Main Street Economic and Fiscal Impact Assessment | State of Tennessee
Tennessee Department of Economic & Community Development

Retail Market Analysis, Vacancy Support and Activation Strategy | Washington, DC
Friends of Rhode Island Avenue

Statewide Reliability Assessment of Historic Main Street Data | State of Michigan
Michigan Economic Development Corporation

Economic Impact of Capital Improvements and Infrastructure on Local Businesses |
Washington, DC, DC Water Agency

Hechinger Mall Redevelopment Visioning and Impact Assessment | Washington, DC
H Street Main Street

Fiscal Impact of Pineland Prairie Proposed Development | Martin County, Florida
Martin County

Deanwood Retail Market and Enhancement Strategy | Washington, DC
Ward 7 Business Partnership

Grant Support and Strategic Services for Legacy Businesses | Washington, DC
Ward 7 Business Partnership

MLK Gateway Redevelopment Market Analysis and Employment Impact Assessment |
Washington, DC, Menkiti Group

12.0 Addendum to the Proposal

12.1 Major Street and Trails Plan

This Comprehensive Planning process creates the ideal time and conditions for Smithville to develop a Major Street and Trails Plan for the city. As we have learned through the Visioning and Strategic Planning Process, we understand that opportunities exist to foster stronger physical connections throughout the city and that the community is eager and excited about this prospect. We recommend including the Major Street and Trails Plan as a Chapter in the Comprehensive Plan or as a Sub-Chapter within the Comprehensive Plan's Transportation Section. This will create efficiencies of the planning process and reduce stakeholder fatigue by engaging these stakeholders, including the community and city, during the overall Comprehensive Planning process rather than as a secondary planning process afterwards. By incorporating the Major Street and Trails Plan into the Comprehensive Plan, Smithville will eliminate redundancies, ensure its public plans and documents easy to understand for readers, and follow best practices of Comprehensive Plans.

Proposed Scope of Services

Our Proposed Scope of Service will include the Major Street and Trails Plan as a Chapter or Sub-Chapter in the Comprehensive Plan. We anticipate this section to be approximately 4-6 pages in length. We anticipate our proposed process to include:

Determining Smithville Major Street and Trail Plan Goals. These goals may reflect existing feedback from the Strategic Planning process and well as city-identified goals. Themes may include connectivity, activity, design, safety, and more.

Engaging with the city and the community to identify opportunities to implement the Major Street and Trail Plan goals. Our team will work with the city of Smithville and relevant departments including Streets, Parks and Recreation to identify relevant Major Street and Trail opportunities and typologies. We will also incorporate important feedback from the community which we will engage during the Community Planning process.

Developing Smithville Major Street and Trail Map. We propose that the Smithville Major Street and Trails Plan Section of the Comprehensive Plan include a city-wide map. This map may identify these key opportunities such as areas of connectivity, existing and proposed parks and trail networks, and areas to encourage public realm and street considerations (such as priority areas for streetscape / complete street improvements).

Identifying Recommendations and Policies to implement the Major Street and Trails Plan. We work with the city to outline policies and tools to implement proposed Major Street and Trails Plan over the coming years. These recommendations will also be

included in the Implementation Strategy and Matrix completed towards the end of the Comprehensive Planning process.

Optional Illustrative Conceptual Renderings of Target Future Conditions. Our team knows that sometimes renderings and imagery is the best way to communicate physical changes to the city. Our team frequently works with partners to develop renderings to communicate key concepts. We have included this service as an optional add-on line itemed in the Proposed Fee.

Schedule

Future iQ and JS&A propose to incorporate the Major Street and Trails Plan into the Comprehensive Planning Process. We anticipate creating this plan during our Proposed Scope Phase 2 and 3.

Personnel

Team personnel for the Major Street and Trails Plan includes all key personnel in the Comprehensive Plan Proposal. Please refer to the proposal for bios and resumes of our personnel.

Proposed Fee

Key Components	Proposed Fee
Major Street and Trails Plan	\$7,500
Illustrative Conceptual Renderings of Target Future Conditions (Optional)	\$2,500 per set of 2

12.2 Economic Development

Economic Development in Smithville surfaced as a key theme during Future iQ's Strategic Planning Process with the City. Based on our engagement during that process and conversations with the city, we believe there is a strong opportunity to include Economic Development as a Chapter in the Comprehensive Plan. We believe this Chapter is an important and necessary inclusion to the Comprehensive Plan that should be emphasized during this update. Future iQ and JS&A are ready to provide our expertise as Economic Development consultants to help Smithville plan for strengthening its local economy and develop implementable actions and policies for a resilient Smithville.

Proposed Scope of Services

Our Proposed Scope of Service will include Economic Development as a Chapter in the Comprehensive Plan. We anticipate this section to be approximately 4-6 pages in length and will include the following scope elements:

Economic Trends and Projections. Our team will analyze Smithville's economic trends and future projections. We anticipate this analysis to include employment trends and projections, industry sector analysis, and deeper dive demographic and population analysis.

Opportunities to Strengthen Smithville's Local Economy. Our team will work with the City to identify the unique assets of Smithville's local economy, the impacts of the economy on other sectors of Smithville, and opportunities for economic and cultural development.

Implementation, Milestones, and Policy Recommendations. We will identify both near-term and long-term strategic recommendations to implement the opportunities at hand to strengthen the local economy and plan for a resilient Smithville in the coming years.

Schedule

Our team proposes to include the Economic Development section into the Comprehensive Planning process. We anticipate creating this Chapter during our Proposed Comprehensive Plan Scope Phase 2 and 3.

Personnel

Our team personnel for the Economic Development Chapter includes all key personnel in the Comprehensive Plan Proposal. Please refer to the proposal for bios and resumes of our personnel.

Proposed Fee

Key Components	Proposed Fee
Economic Development Chapter of Comprehensive Plan	\$5,000

Revised Anticipated Fee Schedule and Hourly Rates – Future iQ (Updated 19 November)

Key Phases	Key Components	REV Fees
Phase 1: Public Launch	<ul style="list-style-type: none"> Initial planning and project schedule Review of existing 2005 Comp Plan for Adequacy Develop public engagement and communication plan Public launch to outline the Comp Plan process 	\$5,000
Phase 2: Task Force and Public Engagement work	<ul style="list-style-type: none"> Create Task Force for each strategic pillar (from vision process) Review vision process surveys and data Explore best practice examples and case studies, drawing from Benchmark Report and other sources Task Forces refine community goals and priorities to reflect updated Community Vision Inventory and assessment of issues and opportunities Public Open House sessions and Focus Groups with City Staff to gather community input on Comp Plan sections/elements Council Retreat (tentatively May) 	\$20,000
Phase 3: Update Specified Elements of the Comprehensive Plan	<ul style="list-style-type: none"> Compilation of public input on Comprehensive Plan sections/elements; Data visualization and Summary Report Analysis of Comprehensive Plan Sections: <ul style="list-style-type: none"> Community Context and Goals Land Use Plan Character Areas Transportation Major Streets and Trails (without renderings) Economic Development Infrastructure Implementation Meetings with Planning Dept on Comp Plan Sections/Elements Develop, draft and vet recommendations for Comp Plan Draft updated Comp Plan to City staff and Council for input Develop and draft Implementation Strategy and Matrix Revisions to Comp Plan and Implementation Strategy Community presentation for final input Renderings 	\$50,000
Phase 4: 2040 Comp Plan	<ul style="list-style-type: none"> Implementation Roadmap drafted for approval Final version of Smithville Comprehensive Plan Final Community Presentation 	\$5,000
Total	FIXED PRICE PROPOSAL	\$80,000

Proposed payment schedule: 25% on signing contract; 25% at completion of phases 2, 3, 4 (possibly a split payment on Phase 3, due to size of phase)

ACORDTM**CERTIFICATE OF LIABILITY INSURANCE**

DATE (MM/DD/YYYY)

12/05/2019

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must have **ADDITIONAL INSURED** provisions or be endorsed. If **SUBROGATION IS WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer any rights to the certificate holder in lieu of such endorsement(s).

PRODUCER CBIZ Insurance Services, Inc. 222 S 9th St. STE 1000 Minneapolis, MN 55402 763 549-2200		CONTACT NAME: Deborah Overkamp PHONE (A/C, No, Ext): 763 549-2200 E-MAIL ADDRESS: doverkamp@cbiz.com FAX (A/C, No): 763 549-2999															
INSURED Future iQ Inc. P.O. Box 24687 Minneapolis, MN 55424		<table border="1"> <thead> <tr> <th>INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A : Great Northern Insurance Co.</td> <td>20303</td> </tr> <tr> <td>INSURER B : Federal Insurance Co.</td> <td>20281</td> </tr> <tr> <td>INSURER C : Chubb National Insurance Co.</td> <td>10052</td> </tr> <tr> <td>INSURER D : Federal Insurance Company</td> <td>20281</td> </tr> <tr> <td>INSURER E :</td> <td></td> </tr> <tr> <td>INSURER F :</td> <td></td> </tr> </tbody> </table>		INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A : Great Northern Insurance Co.	20303	INSURER B : Federal Insurance Co.	20281	INSURER C : Chubb National Insurance Co.	10052	INSURER D : Federal Insurance Company	20281	INSURER E :		INSURER F :	
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COVERAGES**CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			36046245	04/01/2019	04/01/2020	EACH OCCURRENCE \$1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$1,000,000 MED EXP (Any one person) \$10,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COMP/OP AGG \$2,000,000 \$
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS ONLY			73599748	04/01/2019	04/01/2020	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
B	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> EXCESS LIAB DED \$ RETENTION \$			78184579	04/01/2019	04/01/2020	EACH OCCURRENCE \$1,000,000 AGGREGATE \$1,000,000 \$
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE/OFFICER/MEMBER EXCLUDED? <input checked="" type="checkbox"/> N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		N/A	71757444	04/01/2019	04/01/2020	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$500,000 E.L. DISEASE - EA EMPLOYEE \$500,000 E.L. DISEASE - POLICY LIMIT \$500,000
D	Professional			82222373	06/07/2019	04/01/2020	Aggregate: \$1,000,000.00

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER**CANCELLATION**

City of Smithville
 107 W. Main Street
 Smithville, MO 64089

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

John A. Mondak