



**City Manager Department**

# Memo

To: City Council  
From: Chloé Woodmansee, Assistant to the City Manager  
Date: December 13, 2023  
Re: Item 8.C: Strategic Planning Contract

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On December 11 and 12, 2023, staff and Council Members Brooks and Pedersen conducted interviews with the top-three strategic planning consultant RFP teams. The interview panel recommends BerryDunn as the consultant for this project, based on the firm's high level of experience, dedication to community outreach, and overall approach to the project.

Staff expects that work on the strategic plan development project will begin early in 2024 and take at least six months from project launch to final plan adoption. The first step after executing the project contract will be a kick-off meeting between City and BerryDunn staff. Staff will provide a more detailed project timeline, along with the specific expectations of the Council's involvement in the project, in early 2024.

The updated recommended action for Item 8.C is to authorize the City Manager to execute a Professional Services Agreement with BerryDunn in an amount not to exceed \$50,000 to develop a five-year City of Capitola strategic plan.

Attachment:

1. BerryDunn Proposal



## PROPOSAL

# City of Capitola Strategic Plan Development Services

[berrydunn.com](http://berrydunn.com)

### **BerryDunn**

4722 North 24<sup>th</sup> Street, Suite 250  
Phoenix, AZ 85016  
480.482.3002

**Seth Hedstrom, Project Principal**  
[shedstrom@berrydunn.com](mailto:shedstrom@berrydunn.com)

**Michelle Kennedy, Project  
Manager and Lead Facilitator**  
[mkenedy@berrydunn.com](mailto:mkenedy@berrydunn.com)

**Proposal Submitted On:**  
November 10 before 5 p.m.

## Cover Letter

November 10, 2023

City of Capitola  
Attention: Chloé Woodmansee, Assistant to the City Manager  
420 Capitola Ave  
Capitola, CA 95010

Dear Chloé Woodmansee:

On behalf of Berry, Dunn, McNeil & Parker, LLC (BerryDunn), I am pleased to submit this proposal in response to the City of Capitola's (the City's) Request for Proposals (RFP) for Strategic Plan Development services. We have read the City's request and reviewed its terms, conditions, and the contents presented therein. Our proposal is a firm and irrevocable offer valid for 90 calendar days from the proposal deadline of November 10, 2023.

BerryDunn is a nationally recognized independent management and IT consulting firm, headquartered in Portland, Maine, with eight office locations nationally. **Focused on inspiring organizations to transform and innovate**, we are a stable and well-established firm that has preserved our core values and reputation for excellence throughout our 49-year history. Our firm's culture is centered on a deep understanding of our clients' commitment to serving the public. BerryDunn proudly tailors each of its projects to recognize the work our clients do every day.

From extensive project experience for more than **600 state, local, and quasi-governmental agencies**, our team brings valuable perspectives to every engagement. Additionally, our team has prior experience serving state and local government agencies, providing them with an in-depth understanding of government operations, staffing needs, budgetary constraints, and the business processes required to provide necessary services to the internal divisions and the constituents the City serves.

Our firm provides a full range of professional services that support our ability to complete the City's outlined tasks. With organizational development as a core tenant of our work, we are pleased to offer the following services to benefit the City:

- ▶ Strategic planning
- ▶ Community/stakeholder engagement/planning
- ▶ Cost of service and financial analysis
- ▶ Leadership development
- ▶ Executive coaching
- ▶ Organizational change management
- ▶ Organizational assessment
- ▶ Business process improvement
- ▶ Performance measurement
- ▶ Technology planning

We understand that City Council has requested that City staff research and develop a Strategic Plan to guide Council, staff, and budgetary priorities over a dedicated time frame. **We are here to serve you.** We have not just served clients like you nationally; but we have also served local clients such as the cities of Menifee, Redlands, and Santa Monica, and Santa Clara County, for their strategic planning needs.

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

Sincerely,



**Seth Hedstrom, PMP®, LSSGB, Principal**

2211 Congress Street, Portland, ME 04102-1955  
t/f: 207-541-2212 | e: [shedstrom@berrydunn.com](mailto:shedstrom@berrydunn.com)

## Project Understanding

Named one of *Sunset* magazine's "best beach towns," the City of Capitola sits on the shores of the Pacific Ocean with a breathtaking view of Monterey Bay and boasts of Mediterranean flavor. California's oldest seaside resort town is located just 35 miles southwest of San José and less than two hours' drive from San Francisco. The City began as a popular beachfront tourist destination, a place where everyone could come to enjoy beautiful parks and sand beaches. Today, the City maintains those roots and has added a vibrant commercial district and several distinct residential neighborhoods. Nearly 10,000 people call Capitola home, and countless more visit to experience both its natural beauty and other attractions. Many residents and visitors express that ***"this little town is full of adventure and will make you feel at home immediately."***

The City Council has "requested that staff research and develop a Strategic Plan" and are looking for a consultant to support staff in doing so. The City benefits from proactive, goal-oriented leadership who care about the City's development, growth, and success. As such, the City seeks a qualified consultant to assist in the creation of a high-quality, efficient, and timely City of Capitola Strategic Plan that furthers its mission. This Strategic Plan will be the City's first and a unique opportunity for the City to look at who it is and who it wants to be.

### How BerryDunn Can Help



**Our demonstrated commitment to serving clients in the State.** Our proposed project manager and lead facilitator, Michelle Kennedy, is based on the West Coast and has led strategic planning projects for the Cities of Redlands and Menifee. Currently, she is serving as project manager and lead facilitator for the City of Santa Monica's homelessness strategic plan and Santa Clara County's Consumer and Environmental Protection Agency (CEPA). We have a strong presence and commitment to working with California local governments, and we will use our expansive knowledge and lessons learned from these projects to deliver exceptional services on this engagement.



**Our decades of relevant strategic planning experience.** We are dedicated to serving the public sector and providing a wide variety of services, informing and enhancing our ability to support our clients with strategic planning initiatives. Our proposed project manager and lead facilitator, Michelle Kennedy, has nearly three decades of strategic planning experience and has facilitated more than 70 strategic planning processes over the course of her career. Her—and others in our proposed project team—broad exposure to the strategic planning process gives us an in-depth understanding of the importance in establishing trust and credibility with stakeholders and effectively engaging said stakeholders in the planning process to build buy-in for a common vision and commitment to action.



**Our approach is consensus-based and produces actionable plans.** Our approach is based in the Institute of Cultural Affairs' (ICA) Technology of Participation® (ToP®) facilitation methodology and designed to meet the needs of stakeholders, including elected and appointed officials, managers, frontline staff, and the public. Throughout the process, we will keep stakeholders informed and involved using a variety of innovative engagement strategies. This will help to ensure the City's strategic planning effort is inclusive of all perspectives and reflects a shared vision.



**Our highly skilled project team and their commitment to local government.** All our project team members exclusively serve local government clients and the majority have prior experience working in local government organizations prior to joining BerryDunn. Having served dozens of local governments, of all sizes, across the country, our team has a deep understanding of local government organizations, as well as the opportunities and constraints associated with the region's public-sector landscape. We have experience meeting clients ***where they are***—from cities that are embarking on their first strategic plan to clients who have many years of executing their strategic plans. Collectively, we are well-qualified to support the City as it seeks to improve, transform, and innovate, as well as achieve its desired future state.

## Scope of Work

Our project team will engage the City's elected and appointed officials, staff, residents, community groups, major employees, key partners, and other stakeholders in ways that will maximize creativity and innovation and inspire collaboration and consensus for achieving its vision. We will help the City develop a strategic plan that can reasonably be implemented with support and commitment from its stakeholders.

A strategic plan is a living document that defines the organization's reason for being. It establishes a clear and compelling vision; sets measurable objectives and lays out the desired impact on and value added to entire communities—including residents, business, employees, and other stakeholders; and helps set a direction and focus and assists in aligning resources to accomplish strategic objectives.

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

### Encouraging Crossing Boundaries and Strengthening Interdependencies

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

### Applying Effective Tools

Another key to success is aligning financial resources of the organization with strategic priorities. When groups have difficulty agreeing on priorities or selecting just a few to focus on, we use a cost-benefit scoring sheet that helps the group score the impacts, risks, level of difficulty, and effort for each strategy or objective to determine the ones to prioritize. We can customize this tool for use with the City if the group is having difficulty achieving consensus.

### Developing Clear and Compelling Plans That Articulate a Business Case

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

### Effectively Engaging the Public

We will utilize several strategies to effectively engage and collect data and information from the public, including developing communications, conducting interviews and focus groups, and creating an interactive project landing and engagement website via Social Pinpoint.

**Social Pinpoint** is a customizable community engagement platform that is used to inform stakeholders of project goals, objectives, and progress, and provide opportunities to interact and gather information. This tool has several features that we use frequently and as needed throughout strategic planning projects, such as forums, mapping, an ideas wall, and surveys. It is also important to note that Social Pinpoint is mobile-friendly and has a Google Translate interface.

With this tool, we will easily be able to set up a landing page and sub-pages for the City to capture the culture of the stakeholders it serves—providing opportunities for participants to contribute to the City's mission, values, vision, and strategic priorities. We will also be able to track analytics and progress in real-time, promote participation, and set up email notifications to help ensure that, even in a remote environment, effective strategic planning and community engagement activities can take place.



We recently developed fully customized Social Pinpoint sites to support the following clients, as well as others:

▶ City of Menifee, California

▶ City of Redlands, California

## Work Plan

Below and on the following pages, we provide details of our work plan to conduct the City's project effectively and efficiently. We include timeline details in the work plan narrative for further consideration. To be responsive to the City's page limits, we were high-level with these details. We are happy to discuss our timeline further with the City upon request or during project initiation activities.

### Phase 1: Project Planning (*four weeks*) and Management (*ongoing*)

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

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

Examples include:

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

Once provided, we will review the documentation and data to help us produce an Environmental Scan and Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis that will inform engagement activities.

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

*Deliverable 1 — Project Work Plan and Schedule*

## Phase 1: Project Planning (four weeks) and Management (ongoing)

**1.4 Identify Strategic Planning Partners and Participants and Develop a Communications Strategy.** We will assist the City in developing a stakeholder engagement list. This will include developing communications and messaging to build awareness for the process, its intended outcomes, and opportunities for stakeholders to get involved, as well as to keep City Council, City staff, and community stakeholders informed about the strategic planning process. It will also include any kickoff presentations for orientation of the City Council and City leadership. We will review messaging and communications with the City's project team before finalizing and working with the City's project team to distribute them.

**1.5 Develop Questions and Protocols to Guide Stakeholder Interviews.** To understand how the City Council, leadership, staff, and other key participants view the current environment and issues of strategic importance—and to gather information for the Environmental Scan—our project team will develop questions to guide individual interviews, surveys, and the strategic planning sessions we facilitate. We will review the questions and protocols with City's executive team to build consensus and solicit feedback before updating them to final.

Some of the topics we will address are:

- ▶ What current and/or emerging trends have the biggest influence on where efforts and resources should be focused?
- ▶ What are the potential scenarios that the City should be prepared for in the coming 2, 5, and 10 years?
- ▶ What is the most pressing problem or concern facing the City?
- ▶ What is the City's long-term vision for itself as an organization and the residents and visitors it serves?
- ▶ What opportunities could more effectively leverage City's efforts, resources, and capacity to achieve better outcomes?
- ▶ What does the City desire to address or accomplish on behalf of its employees, members and, more broadly, the people of Capitola?
- ▶ What obstacles or challenges could get in the way of the City successfully pursuing its strategic direction and implementing its plan?

In addition to developing questions and protocols, we will also work with the City's executive team to schedule and communicate opportunities to involve appropriate groups.

**1.6 Conduct Biweekly Project Status Meetings.** Our project manager and lead facilitator, Michelle, will conduct Biweekly Project Status Meetings with the City's project manager on an ongoing basis throughout the strategic planning process. We will use these meetings to describe the activities and accomplishments for the reporting period; plans for the upcoming month; risks or issues encountered during the reporting period; and anticipated problems that might impact project deliverables. We will also use these meetings to highlight any work products and approaches that will contribute to deliverable development.

*Deliverable 2 — Biweekly Status Meetings*

## Phase 2: Develop the Environmental Scan (12 weeks)

**2.1 Conduct Interviews with City Stakeholders.** We will conduct individual and group interviews and focus groups with City Council, senior leadership, key staff, and community stakeholders, as appropriate, to thoroughly review and assess services and the needs of the community. These interviews will be guided by previously developed questions and protocols. Working with these diverse stakeholder groups, we will help ensure alignment and cohesion for the City's strategic direction, as well as generate excitement, promote consensus and buy-in, and encourage participation and involvement in the process.

**2.2 Develop and Administer the City's Social Pinpoint Site.** We will utilize tools and technology that will help to encourage collaboration with the City and its stakeholders. One of these tools, a virtual engagement

platform called **Social Pinpoint**, will be customized to encourage community engagement in the strategic planning process and to gain broad stakeholder input that will be used to inform development of the Final City of Capitola Strategic Plan. We will work in collaboration with the City to help ensure its landing page is built thoughtfully and speaks to its culture. Additionally, within this landing page, City stakeholders will have access to an external survey (can also be used to survey City employees), idea wall, and other engagement tools that will help gather information related to the City's current environment and the community's desired vision for the City's future.

**2.3 Review and Analyze City-Provided Documents and Data.** We will review and analyze the documents and data requested in Task 1.5. This will be used to help us produce an Initial Environmental Scan and SWOT Analysis that will inform engagement activities.

**2.4 Synthesize Information Gathered and Develop an Initial Environmental Scan and SWOT Analysis.** We will synthesize information gathered through quantitative and qualitative research, document and data review, Social Pinpoint, employee survey, Budget Book, Comprehensive Plan, department-level plans, Committee and Boards Annual Reports, leadership and stakeholder interviews, and any available performance data to develop an Initial Environmental Scan and SWOT Analysis. The format will be a highly visual and compelling slide deck and will be used to inform the upcoming community forums and strategic planning sessions. The presentation will provide an overview of the City's current environment; a detailed SWOT Analysis; and discovery outcomes to the City's project team to solicit input and gain consensus.

**2.5 Update the Initial Environmental Scan and SWOT Analysis to Final.** We will incorporate community forum outcomes in our Initial Environmental Scan and SWOT Analysis and review it with the City's project team and City Manager to solicit feedback before updating it to final. The Final Environmental Scan and SWOT Analysis will guide and inform strategic planning sessions, as well as generate excitement for the process among stakeholders, encourage new ideas, and foster a sense of cohesion and optimism for the future. The Final Environmental Scan and SWOT Analysis will also include a strengths, weaknesses, opportunities, and challenges analysis that will assist in the development of the Final City of Capitola Strategic Plan.

*Deliverable 3 — Initial and Final Environmental Scan and SWOT Analysis*

### Phase 3: Develop the Strategic Plan (*eight weeks*)

**3.1 Develop the Meeting Design and Agendas for Strategic Planning Sessions 1 and 2.** We will design and develop agendas for Strategic Planning Sessions 1 and 2. Each session's design and agenda will guide strategic planning progress and will include a presentation of the Final Environmental Scan and SWOT Analysis to provide participants with a shared understanding of the current environment, the trends that are affecting it, opportunities for the future, and key takeaways from engagement activities. Each in-person session will focus on building consensus and refining the strategic priorities identified, as well as the City's vision and key results. We will review the meeting designs and agendas for each session with the City's project team before updating them to final.

*Deliverable 4 — Plan Development Agendas*

**3.2 Facilitate Strategic Planning Workshops (On-Site Trip #1).** Strategic Planning Session 1 will focus on developing the City's vision, mission, values, strategic priorities, and goals with the City Council. This session will be guided by the previously developed meeting design and agenda, as well as the Final Environmental Scan and SWOT Analysis. We will use the ICA ToP® facilitation methodology, designed to produce group consensus, to address and resolve any conflicting values or visions. We will document the outcomes of this session to review with the City's project team and plan for next steps. Strategic Planning Session 2 will be with City leadership and selected key staff, refining City Council's work, establishing strategic objectives, and performance measures. The Environmental Scan and SWOT Analysis will be presented to provide context, foundation, and shared understanding of the current environment in support of the Strategic Plan.



### Phase 3: Develop the Strategic Plan *(eight weeks)*

**3.3 Develop and Present the Initial City of Capitola Strategic Plan Draft.** We will develop the Initial City of Capitola Strategic Plan Draft in an agreed-upon format for the final document. This plan document will include an executive summary, as well as a detailed plan that identifies the City's shared vision, mission, guiding principles, strategic priorities, goals, objectives, and performance measures.

*Deliverable 5 — Initial City of Capitola Strategic Plan Draft*

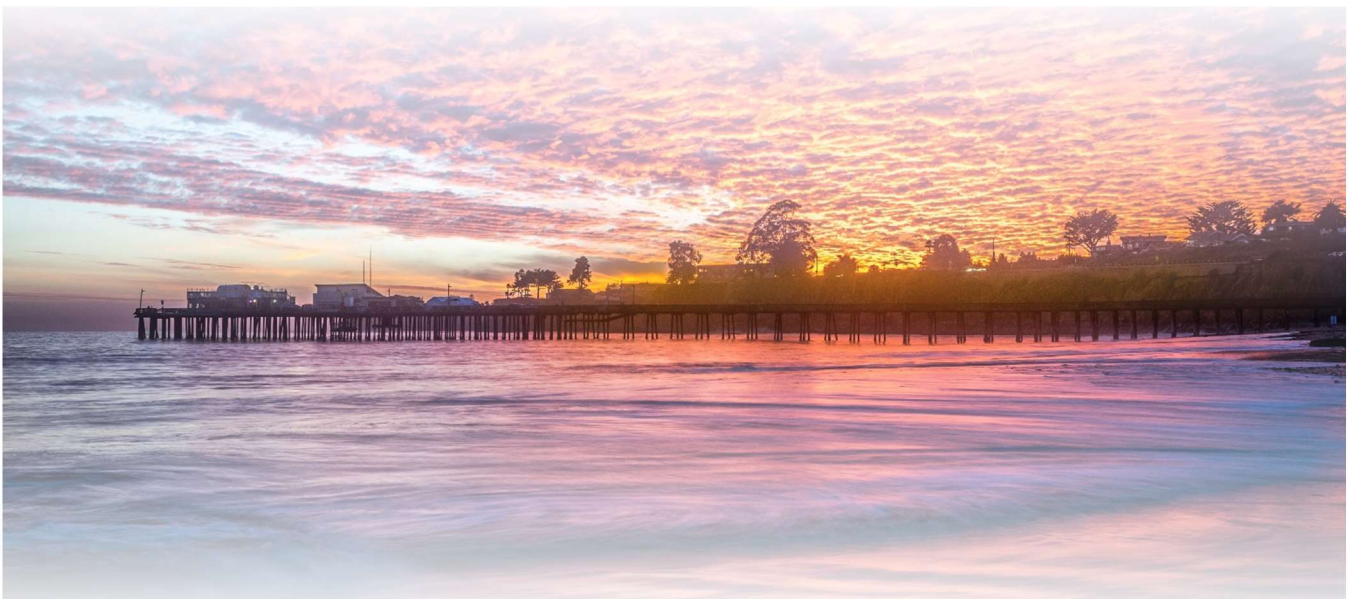
**3.4 Facilitate Work Session to Review Draft City of Capitola Strategic Plan.** We will review and edit this draft with the City Manager, the City's project team, key staff and prepare a presentation to present the Initial City of Capitola Strategic Plan Draft to the City Council in a work session. This will serve as an opportunity for the City Council to provide feedback and make any final changes.

**3.5 Develop the Final City of Capitola Strategic Plan (On-Site Trip #2).** After reviewing the Initial City of Capitola Strategic Plan Draft with the City Council, we will incorporate and Council requested edits and develop a graphically designed, Final City of Capitola Strategic Plan for final approval and adoption. In addition to the content described in Task 3.4, the final document will include a description of the Strategic Plan development process, the plan for progress monitoring and reporting, as well as the development of a one-page "Plan at a Glance" document that can serve as a standalone high-level summary of the Strategic Plan. The "Plan at a Glance" will follow the design and branding of the full Strategic Plan and include mission and vision statements, guiding principles/values, strategic priorities, strategic goals, and a link to the website where the full plan can be reviewed or downloaded.

*(Optional Service) 3.6 Create a Graphically Designed Version of the Strategic Plan. Should the City request, we will develop a graphically designed version of the Final Strategic Plan. This document will reflect the organization's branding and serve as a public-facing tool.*

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

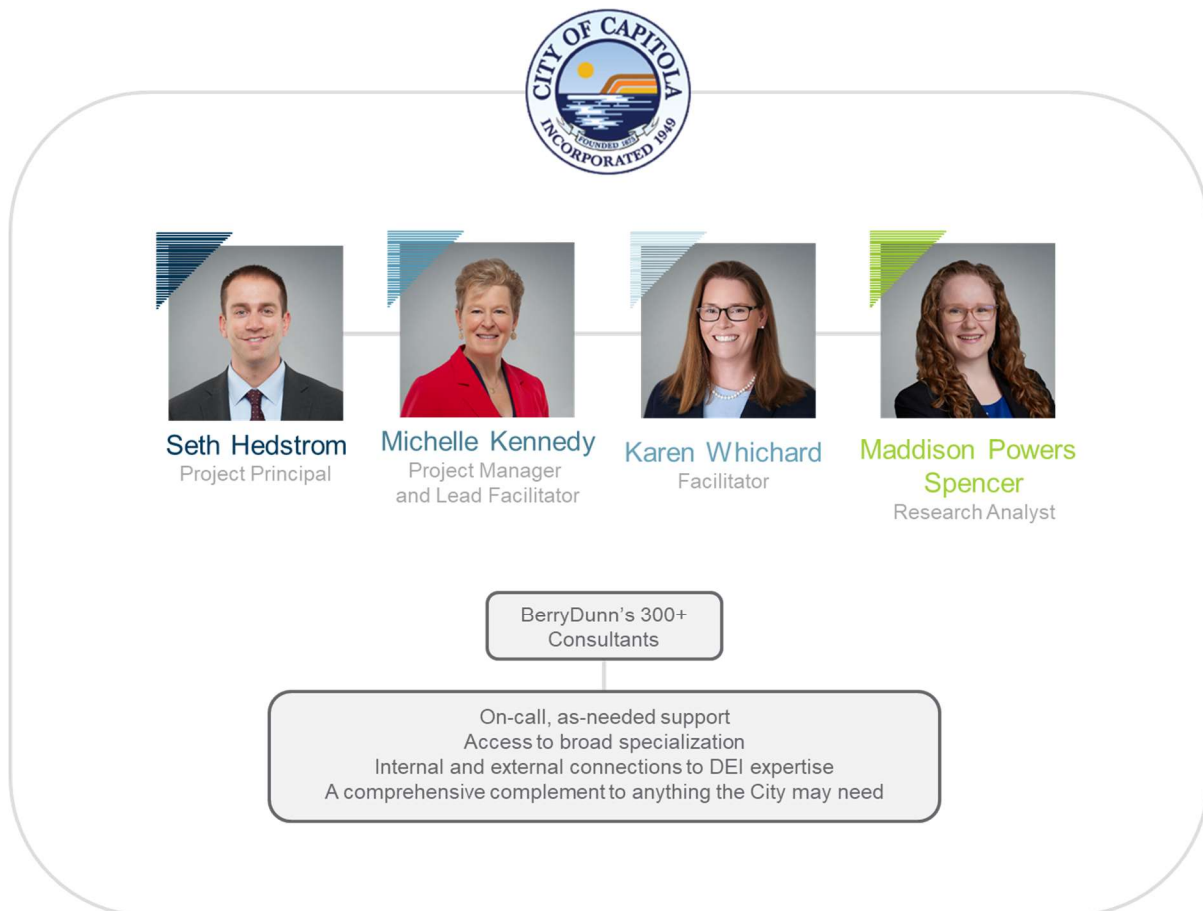
*Deliverable 6 — Final City of Capitola Strategic Plan Draft*



## Personnel

Figure 1 describes the organizational structure of our project team, followed by a listing of project staff.

Figure 1: Project Team Organizational Structure



At BerryDunn, we believe in the synergy that accompanies a team approach. That said, we have carefully assembled a project team with unique and specialized qualifications that coincide with the needs and desired outcomes of the City. **These project team members will remain committed, available, and assigned to perform the City's requested work effort.** It should be noted we do not intend to subcontract any portion of the City's desired scope of work.



## Project Team Resumes

Below and on the following pages, we list our project team members' experience, qualifications, and expertise as it relates to projects of this nature and work with comparable public-sector clients.



### Seth Hedstrom, PMP®, LSSGB

*Project Principal | Principal*

#### EDUCATION AND CERTIFICATIONS

BS, Business Management,  
Babson College

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

Lean Six Sigma Green Belt  
Certified

Diversity and Inclusion  
Certificate, Cornell University

#### MEMBERSHIPS

Associate Member, Government  
Finance Officers Association

**Seth** is a principal and leads BerryDunn's Local Government Practice Group. He has more than 14 years of experience assisting public-sector clients. His experience includes technology planning, organizational needs assessments, system planning and procurement, and the implementation of enterprise-wide information systems. Seth often serves in a leadership role on strategic planning projects and manages and oversees project progress and issue escalation and resolution with executive project sponsors.

#### RELEVANT EXPERIENCE

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

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

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

#### REPRESENTATIVE CLIENTS

- ▶ City of Cooper City, FL
- ▶ City of Edgewater, CO
- ▶ City of Ennis, TX
- ▶ City of Foley, AL
- ▶ City of Groveland, FL
- ▶ City of Lauderhill, FL
- ▶ City of Menifee, CA
- ▶ City of Milton, GA
- ▶ City of New Braunfels, TX
- ▶ City of Redlands, CA
- ▶ City of Springfield, MO
- ▶ City of St. Charles, IL
- ▶ City of Washougal, WA
- ▶ City of Waukesha, WI
- ▶ City of Wausau, WI
- ▶ City of Westminster, CO
- ▶ DuPage County, IL
- ▶ Jefferson County, WA
- ▶ Lake County, IL
- ▶ Lancaster County, NE
- ▶ Lane County, OR
- ▶ Marquette County, MI
- ▶ Newton County, GA
- ▶ Orange County, NC
- ▶ Weld County, CO



**Michelle Kennedy,**  
**Prosci® CCP,**  
**ODCC**

*Project Manager and Lead  
 Facilitator | Manager*

**EDUCATION AND  
 CERTIFICATIONS**

BA, Journalism/Mass  
 Communication, Iowa State  
 University

Certified: Hogan Leadership  
 Assessment System®, Myers  
 Briggs Type Indicator®, ICA ToP  
 Facilitation Methodology  
 Prosci® Certified Change  
 Practitioner

Organization Development  
 Certified Consultant (ODCC)

**PUBLICATIONS AND  
 PRESENTATIONS**

Presentation at the Oregon  
 Recreation and Parks  
 Association (ORPA) Annual  
 Conference, 2019: *Rivers of  
 Change Oceans of Opportunity:  
 Planning Your Strategy During  
 Turbulent Times*

Presentation at “Results  
 Washington” Lean  
 Transformation Conference,  
 2018: *Transforming the  
 Municipal Development Review  
 Process Using Lean Practices*

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

**RELEVANT EXPERIENCE**

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

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

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

**REPRESENTATIVE CLIENTS**

- ▶ City of Beaverton, OR
- ▶ City of Cooper City, FL
- ▶ City of Creswell, OR
- ▶ City of Edgewater, CO
- ▶ City of Ennis, TX
- ▶ City of Gresham, OR
- ▶ City of Groveland, FL
- ▶ City of Menifee, CA
- ▶ City of Milton, GA
- ▶ City of Lauderdale, FL
- ▶ City of New Braunfels, TX
- ▶ City of Redlands, CA
- ▶ City of San José, CA
- ▶ City of Santa Monica, CA
- ▶ City of Springfield, OR
- ▶ City of Washougal, WA
- ▶ City of Wausau, WI
- ▶ City of Westminster, CO
- ▶ DuPage County, IL
- ▶ Jefferson County, WA
- ▶ Lancaster County, NE
- ▶ Lane County, OR
- ▶ Lake County, IL
- ▶ Marion County, OR
- ▶ Marquette County, MI
- ▶ McHenry County, IL
- ▶ Metro Parks Tacoma, WA
- ▶ San Mateo County, CA
- ▶ Tompkins County, NY
- ▶ Vancouver Housing Authority, WA
- ▶ Washington County, MN
- ▶ Weld County, CO





## Karen Whichard, MPA, Prosci® CCP

*Facilitator | Consultant*

### EDUCATION AND CERTIFICATIONS

MPA, University of North  
Carolina Charlotte

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

Prosci® Certified Change  
Practitioner

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

### RELEVANT EXPERIENCE

**Strategic Planning:** During Karen's time with the Town of Davidson, North Carolina, she directed the creation and adoption of the 2020-2021 two-year strategic plan including managing the biennial town board retreat. While working for the City of Charlottesville, Karen served as the lead budget analyst for the Strategy and Budget Department. In this role, she contributed to the City's Environmental Focus Area Plan and the Strategic Energy Action Plan.

**Organizational Development:** As assistant county manager for Gaston County, North Carolina, Karen was a member of the executive leadership team. In this role, she helped rebuild the relationship with a key community non-profit active in child welfare and foster care after years of challenges. She also implemented a change management program to improve workplace culture in the Division of Social Services – Child Welfare Division. Karen reformed the Health & Human Services Division to increase collaboration, promote efficiency, and improve client outcomes.

**Financial Management:** As a member of the City of Charlotte Strategy and Budget Department, Karen provided operating and capital budget oversight of operating and capital budgets for functions including housing and neighborhoods, code enforcement, solid waste collections and the City's water/sewer utility. This work included analyzing budgets and personnel requests for appropriate staffing levels, evaluating capital needs, benchmarking city services, and ensuring rates and fees were set to meet cost recovery targets. As assistant town manager for the Town of Davidson, she managed the Town's \$14 million public facilities project as well as \$17 million in general obligation bond projects for parks, greenways and transportation. Part of this work led to the Town of Davidson's first AAA bond rating.

### REPRESENTATIVE CLIENTS

- ▶ City of Foley, AL
- ▶ City of New Braunfels, TX
- ▶ DuPage County, IL
- ▶ Lake County, IL
- ▶ Orange County, NC
- ▶ Tompkins County, NY





## Maddison Powers Spencer, MPA, CAPM®

*Research Analyst |  
Consultant*

### EDUCATION AND CERTIFICATIONS

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

BS, Political Science, Northern  
Arizona University

**Maddison** is a consultant in our Local Government Practice Group. She has firsthand experience serving in the public sector and is familiar with the unique aspects of government operations. Notably, she has been involved in various governmental initiatives, including those related to diversity, equity, and inclusion (DEI); sustainability; and process and project analysis and management. Maddison focuses on assisting public-sector clients with strategic planning by supporting research, current environment assessments, data collection, and facilitating community engagement and outreach. She has served as research analysis and facilitator on many local government strategic planning projects, including for the City of St. Charles, Illinois and City of Menifee, California.

### RELEVANT EXPERIENCE

**Local Government:** Maddison served as a senior fellow within the International City/County Management Association (ICMA) where she managed recruitment, hiring, and the interview process for two assistant city managers. She also led a leadership development initiative to develop more women leaders in the organization, and she managed an annexation study where she interacted with various stakeholder groups to better understand the implications of service delivery.

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

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

### REPRESENTATIVE CLIENTS

- ▶ Boulder County, CO
- ▶ City of Ennis, TX
- ▶ City of Frisco, TX
- ▶ City of Menifee, CA
- ▶ City of New Braunfels, TX
- ▶ City of Peoria, IL
- ▶ City of Springfield, MO
- ▶ City of St. Charles, IL
- ▶ City of Washougal, WA
- ▶ City of Waukesha, WI
- ▶ City of Wausau, WI
- ▶ DuPage County, IL
- ▶ Jefferson County, WA
- ▶ Lake County, IL
- ▶ Lancaster County, NE
- ▶ Marquette County, MI
- ▶ Newton County, GA
- ▶ Tompkins County, NY
- ▶ Washington County, MN
- ▶ Weld County, CO

## Relevant Experience

### Strategic Planning

Below, we provide a list of clients, but not limited to, for whom our project team members have performed similar services within the last six years. In addition to these projects, we are happy to provide additional information and contact information for any of the projects listed below.

- ▶ City of Beaverton, OR
- ▶ City of Cooper City, FL
- ▶ City of Creswell, OR
- ▶ City of Edgewater, CO
- ▶ City of Ennis, TX
- ▶ City of Gresham, OR
- ▶ City of Groveland, FL
- ▶ City of Lauderhill, FL
- ▶ City of Menifee, CA
- ▶ City of Milton, GA
- ▶ City of New Braunfels, TX
- ▶ City of Pensacola, FL
- ▶ City of Peoria, IL
- ▶ City of Redlands, CA
- ▶ City of Santa Monica, CA
- ▶ City of Springfield, MO
- ▶ City of Springfield, OR
- ▶ City of St. Charles, IL
- ▶ City of Tacoma, WA
- ▶ City of Washougal, WA
- ▶ City of Waukesha, WI
- ▶ City of Wausau, WI
- ▶ City of Westminster, CO
- ▶ DuPage County, IL
- ▶ Jefferson County, WA
- ▶ Lake County, IL
- ▶ Lancaster County, NE
- ▶ Lane County, OR
- ▶ Marquette County, MI
- ▶ Metro Parks Tacoma, WA
- ▶ Orange County, NC
- ▶ Oregon Department of Human Services
- ▶ Oregon Harbor of Hope
- ▶ San Mateo County, CA
- ▶ Santa Clara County, CA
- ▶ St. John's County, FL
- ▶ Summit County, CO
- ▶ Tompkins County, NY
- ▶ Town of Holliston, MA
- ▶ Tualatin Hills Parks and Recreation District, OR
- ▶ Washington County, MN
- ▶ Weld County, CO

### References

Below and on the following page, we provide reference information for several clients who can speak to the quality and satisfaction we deliver on comparable engagements. In addition to these projects, we are happy to provide additional information and contact information for any of the projects listed above.

#### City of Washougal, Washington

Dave Scott, City Manager

360-835-8501, ext. 102 | [david.scott@cityofwashougal.us](mailto:david.scott@cityofwashougal.us)

BerryDunn was selected by the City of Washougal in April of 2022 to conduct an updated Strategic Plan for the City. As the sun was setting on the City's last Strategic Plan (2013 – 2023), the City was seeking a new, five-year Strategic Plan that was both strategic and operational and included all parts of the organization. As a result, BerryDunn set out to assist the City in the development of the following: objectives and goals to support the vision, mission, and core values of the City; strategies and initiatives to achieve those goals; performance metrics and indicators to support and reinforce progress; a process for continual City Council feedback and involvement; a process that keeps staff involved and engaged; policies to support the implementation of the Strategic Plan; and a project management plan inclusive of deliverables, a schedule, and a budget.



#### City of Redlands, California

Charles Duggan, City Manager

909-798-7510 | [cduggan@cityofredlands.org](mailto:cduggan@cityofredlands.org)

Located an hour away from four major cities, the City of Redlands is a big city with a small-town feel. In 2021, the City contracted BerryDunn to engage its City Council and Senior Management Team in developing a Six-Year Comprehensive Strategic Plan. While the City had identified 10 core values, but lacked an existing



strategic plan, which allowed our team to work with the City Council and Senior Management Team to define who the City is and who it wants to be.

**City of Gresham, Oregon**

Ashley Graff, Assistant to the City Manager  
 503-618-2297 | [ashley.graff@greshamoregon.gov](mailto:ashley.graff@greshamoregon.gov)



The City of Gresham contracted with BerryDunn to support the City’s shift from an annual Council Work Plan to a long-term, thorough strategic plan that sets a course for the future and lays the groundwork for successful implementation. The City envisioned a strategic planning process that would empower its community to articulate its vision for the future, while enabling the Mayor and Council to set strategic priorities and goals. We worked with a subcontracted DEI expert on this initiative to effectively engage the City’s diverse community.

**City of Menifee, California**

Rebekah Kramer, Assistant to the City Manager  
 951-723-3765 | [rkramer@cityofmenifee.us](mailto:rkramer@cityofmenifee.us)



BerryDunn is currently assisting the City of Menifee in developing a long-term strategic visioning effort that will establish a set of priorities and objectives for its next five years, inform the development of departmental work plans, and provide implementation guidance. Our approach focuses on engaging and analyzing the City’s internal organization and larger, external community through interviews, research, and community forums. Through these efforts and in partnership with key stakeholders, we will develop a strategic plan and performance monitoring guidance.

**Fee Schedule**

Our proposed fixed-fee cost to complete the City’s desired project is broken down by phase in Table 1. Our costs are based on our experience conducting projects of similar size and scope, and the assumption that satisfying a deliverable is based on the City’s signed acceptance. That said, the City will not incur any additional costs associated with the process of reaching deliverable acceptance.

We will utilize our hybrid methodologies through collaborative planning with the City to limit travel expense to the City as appropriate.

*Table 1: Cost by Project Phase*

Phase	Fixed-Fee Cost
<b>Phase 1: Project Planning and Management</b>	\$8,800
<b>Phase 2: Develop the Environmental Scan</b>	\$13,600
<b>Phase 3: Develop the Strategic Plan</b>	\$17,300
<b>Total Fixed-Fee Services Cost</b>	<b>\$39,700</b>
<i>Optional Service: Graphically Designed Version of the Strategic Plan</i>	\$4,000
<i>Travel expense estimated allocation*</i>	\$4,800

*\*This travel expense allocation represents our best estimate to provide a hybrid approach to service delivery. We would be happy to further discuss and refine this estimate with the City. While our services are proposed as a fixed fee, we propose to only invoice the City for actual travel expenses incurred.*