

FEBRUARY 14, 2024

PROPOSAL TO PROVIDE STRATEGIC PLANNING
SERVICES TO:

The City of Lakeville, Minnesota



Ehlers
3060 Centre Point Drive
Roseville, MN 55113

Municipal Advisor Registration Number: K0165
SEC CIK Number: 0001604197

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EHLERS ADVISORS:

Jason Aarsvold

Senior Municipal Advisor
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651-697-8512

Keith Dahl

Municipal Advisor
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February 14, 2024

Tina Goodroad
Community Development Director
20195 Holyoke Avenue
Lakeville, MN 55044



RE: Proposal for Strategic Planning Services for the City of Lakeville

Dear Ms. Goodroad,

We are excited to present this proposal to provide economic development strategic planning services for the City of Lakeville. Preparing an actionable plan that is focused on key community objectives and manageability from both time (for staff *and* elected officials) and funding perspectives is critical to success. Ehlers' strategic planning services will help your community prepare a practical, realistic plan centered on the following foundational elements:

- » Identifying the major challenges and opportunities for continued community success
- » Establishing a framework for a strategic planning process that will permit key officials to shape a practical, achievable plan within a short time period
- » Creating a strategic planning document with tactics, assignments, resources and time requirements for a manageable set of goals

Jason Aarsvold and Keith Dahl will facilitate the strategic planning process, bringing over 30 years of combined experience in direct, hands-on economic development work. What sets us apart from other firms is that we provide strategic plans that aren't simply policy documents, but actual roadmaps and work plans to achieve the stated goals. These living documents are intended to promote action and include timelines for performance and success. In addition, our technical economic development expertise provides guidance on policy and program development, best practices, and funding options that are critical to implementing any economic development strategy.

Thank you for including Ehlers in this RFP process. We look forward to the opportunity to work with you and the City of Lakeville. Please feel free to contact us with any questions. We note that this proposal will remain valid for a period of no less than 120 days from the date of submittal. Firm identification and contact information is located on the cover page of the proposal.

Sincerely,

A handwritten signature in black ink, appearing to read 'Jason Aarsvold', written in a cursive style.

Jason Aarsvold
Senior Municipal Advisor
jaarsvold@ehlers-inc.com
651-697-8512

A handwritten signature in black ink, appearing to read 'Keith Dahl', written in a cursive style.

Keith Dahl
Municipal Advisor
kdahl@ehlers-inc.com
651-697-8595

Qualifications & Experience

Per the requirements of the City’s RFP, Ehlers offers the following similar projects, along with references, to demonstrate our qualifications and experience with this type of work.

The City of Burnsville, Minnesota
Economic Development Strategic Plan
Jeff Thomson Community Development Director 100 Civic Center Parkway Burnsville, MN 55337 (952) 895-4467

The City of Roseville, Minnesota
Business Subsidy Criteria & Public Assistance Policy
Jeanne Kelsey Housing & Economic Development Program Manager 2660 Civic Center Drive Roseville, MN 55113 (651) 792-7086

The City of Dayton, Minnesota
Economic Development Strategic Plan
Zach Doud City Administrator 12260 S Diamond Lake Rd Dayton, MN 55327 (763) 323-4010

Key Personnel

Ehlers proposes the following professional team to fulfill the City’s needs as stated in the RFP’s Scope of Services:

MUNICIPAL ADVISORS

Jason Aarsvold
Senior Municipal Advisor
Project Manager

Keith Dahl
Senior Municipal Advisor
Project Research & Analysis

Professional biographies for each team member follow below:



Jason Aarsvold
Senior Municipal Advisor

Jason has more than 20 years of municipal development and finance experience, including direct local government experience. He has analyzed and negotiated some of the most complicated economic development and redevelopment projects in Minnesota, navigating complex financial issues and creating new, innovative community solutions. One of Jason’s greatest attributes is his ability to demystify the complexities of the economic development process for his clients. He unites community leaders, developers and residents, guiding them through program development with his strong market knowledge and public finance expertise. Specific to the Scope of Services for this engagement, Jason has worked with several EDAs and City Councils to set strategic priorities, prepare policies and programs for implementation, and execute on objectives to achieve a broad range of community development goals. [See Jason’s full biography.](#)



Keith Dahl
Municipal Advisor

Keith joined Ehlers in 2019 and currently serves as a Municipal Advisor with our Minnesota Municipal Finance Team. His prior direct experience in local government, economic development and housing development gives him keen insight into the opportunities and challenges his client communities face. Keith displays a strong understanding of public financial assistance and is able to distill complex information into easy-to-understand terms.

[See Keith’s full biography.](#)

Work Plan & Budget

After a thorough review of the City's RFP and existing reports, Ehlers has a clear understanding of Lakeville's four key priorities and the measurable goals to benchmark progress against them. We intend to help the City *evo/ve* the 2020-2023 Strategic Plan to account for present-day and forecasted future needs, challenges and opportunities relative to:

- » Business retention, expansion and diversification
- » Community brand awareness, competitive benchmarks and infrastructure to attract development
- » Housing that stimulates commercial development and supports job base
- » Workforce optimization to ensure job availability meets demand and existing jobs match available skill sets

We'll use a well-tested, yet flexible approach to gather information, conduct research and analysis, and develop and refine the plan.

Our Facilitation Approach

Have fun!

- » Foster an environment where people want to participate and they can speak freely
- » Build strong relationships amongst EDC commissioners and between EDC commissioners and staff
- » Demonstrate that everyone has the same interest, which leads to betterment of the community

Establish ground rules and obtain group consensus to follow those rules.

- » Agree to standard ground rules (behavioral, acknowledgement for speaking, etc.)
- » Incorporate time limits on comments (critical in order to get through all material in the allotted time frame)

Review Ehlers/staff prepared material (base community characteristics) and facilitate discussion.

- » Encourage participation and thoughtful discussion from all attendees
- » Ask questions to help participants think differently
- » Help participants understand different points of view as needed
- » Foster solutions that incorporate diverse points of view
- » Obtain consensus on each issue/item before moving to next (summarize group consensus)

Manage time effectively.

- » Drive discussions forward by keeping members focused on issues/items and removing roadblocks

Record comments and facilitate consensus on work product from the strategic planning sessions.

- » Clearly show thoughts/ideas/perspectives and consensus reached
- » Have “parking lot” sheet to set aside issues that may need to be discussed further at a future meeting because they cannot be resolved during the allotted time-frame

Work Plan & Budget

Ehlers anticipates a minimum of two (2) meetings for planning purposes with the Economic Development Commission (EDC) and joint meeting with EDC, Planning Commission, and City Council. **Ehlers proposes to complete this work for an amount not to exceed \$14,625.** We will not bill the City for any other expenses. Included below is a proposed scope of work and process for creation of Lakeville’s Economic Development Strategic Plan. **We intend to complete the scope of work by August 30, 2024.**

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WORK PLAN & BUDGET

Step	Scope of Work	Estimated Time & Cost
Data Collection and Compilation	<ul style="list-style-type: none"> » Meet with City Staff to review community and planning issues and discuss process timeline » Review existing plans and studies » Facilitate initial meeting with EDC to discuss process and expectations <ul style="list-style-type: none"> * Overview of community context and data for level setting purposes » Conduct telephone interviews with EDC members (30 minutes each) 	15 Hours
Meetings and Presentations	<ul style="list-style-type: none"> » Facilitate up to three strategic planning sessions with EDC members and City Staff » Facilitate joint meeting with EDC, Planning Commission, and City Council » Identify key themes and development objectives for inclusion in the strategic plan » Build consensus around goals and objectives for inclusion in the Plan. 	20 Hours
Strategic Plan Preparation	<ul style="list-style-type: none"> » Prepare an Economic Development Strategic Plan Document that includes: <ul style="list-style-type: none"> * Short, mid and long-terms goals * Specific tasks and a work plan designed to accomplish the stated goals * Recommended programs and policies for advancement of the Plan * Identification of funding sources and other tools » Meet with City Staff to review and refine summary 	26 Hours
Plan Presentation	<ul style="list-style-type: none"> » Present Final Plan to EDA and City Council, then revise and refine as necessary 	4 Hours
Total Hours		65 Hours
Total Cost @ \$225/Hour		\$14,625

Conflict of Interest

Ehlers has no known material or potential conflicts of interest.

Proposal Agreement

Ehlers and the City of Lakeville agree to the scope of work, not-to-exceed budget, and completion timeline detailed in this proposal.

Ehlers:



Signature: _____ **Date:** February 26, 2024

Jason Aarsvold
Senior Municipal Advisor

The City of Lakeville:

Signature: _____ **Date:** _____

Tina Goodroad, AICP
Community Development Director