

Organizational Coaching and Mentoring

STRATEGIC PLANNING PROPOSAL CITY OF WESTLAKE December 18, 2024

Thank you for the opportunity to submit this proposal to the City of Westlake for conducting a strategic plan for the City. A municipal strategic planning meeting serves a key purpose in helping a municipality define its long-term vision, mission, core values, goals and actionable strategies to guide its development, services, and overall operations. The main objectives of such a meeting include:

1. **Setting Clear Priorities:** The meeting helps municipal leaders, stakeholders, and community members identify and prioritize the most important issues facing the community, such as infrastructure needs, housing, public safety, economic development, and sustainability.
2. **Aligning Resources:** It ensures that available resources (budget, personnel, technology, etc.) are aligned with the priorities and strategic goals of the municipality. This helps optimize how money and other assets are allocated for maximum impact.
3. **Engaging Stakeholders:** It fosters collaboration among key stakeholders, such as elected officials, management staff, community organizations, residents, and business leaders, allowing for a collective effort in shaping the municipality's future efforts. This can lead to better decision-making and more inclusive planning.
4. **Setting Long-term Vision and Goals:** The meeting provides an opportunity to outline a vision for the future of the community, setting both short-term and long-term goals that can guide decision-making and policy development.
5. **Improving Public Services and Infrastructure:** The meeting can address how to improve or expand public services, infrastructure, and facilities, ensuring that they meet the growing needs of the population.
6. **Responding to Emerging Issues:** It offers a platform for identifying and preparing for emerging challenges, such as economic downturns, climate change, population growth, or technological changes, and how to adapt the municipality's strategies accordingly.
7. **Enhancing Accountability and Transparency:** By clearly documenting the strategies and actions discussed, the meeting helps ensure accountability for municipal leaders and creates a transparent roadmap for the public to follow, showing how their taxes and resources are being used.
8. **Building Consensus:** It provides a structured environment to discuss different views, reconcile differing priorities, and build consensus on how to move forward with shared objectives.

INTERNATIONAL INSTITUTUE FOR LEADERSHIP DEVELOPMENT AND TRAINING
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- As local government professionals with more than 40 years of municipal experience (32 years of which have been based here in the State of Florida) we have extensive knowledge and experience of local government operations, trends, and the political process. We have worked with many hundreds of elected officials on far-ranging issues and topics.
- Our lead facilitator, Dale Sugerman, Ph.D. is a trained facilitator in group dynamics and the goal planning process. He has facilitated strategic planning sessions for a number of municipalities in the State of Florida. Dr. Sugerman was an adjunct faculty member at Nova Southeastern University for more than 20 years where he has taught classes in virtually all aspects of local government. In addition, he is a qualified facilitator/trainer working with private sector businesses, helping them to set their vision, mission, values, and goals.

We propose to offer and accomplish the following:

- We will conduct one-on-one interviews with members of the City Council to get their initial input on a variety of topics associated with their goals and objectives for the City. Results of the individual interviews will be collated (without attribution) and provided to the members of the City Council in advance of the strategic planning workshop sessions. The results of the interviews will give members of the City Council a starting point for full engagement during the strategic planning workshop.
- A one-half day (4 hours) community engagement meeting will be conducted prior to the strategic planning workshop. The purpose of this engagement meeting will be to collect input from members of the community (both residential and commercial) on items of interest impacting their lives and businesses and what they believe the City Council should be focused on moving forward.
- Two full-day strategic planning workshop meetings will be held with members of the City Council and key staff to complete the strategic plan as outlined above. This strategic planning workshop meeting is best held off-site at a comfortable location where a formal agenda will be followed. The workshop meeting will include appropriate breaks and meals. The public will be allowed to attend.
- Upon completion of the two-day workshop session, we will provide a written report on the results of the strategic planning effort.

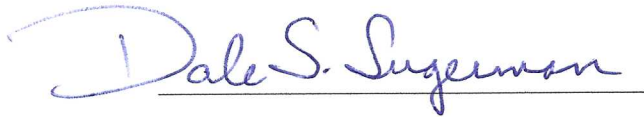
Schedule:

We propose conducting the one-on-one interviews with members of the City Council, as well as the community engagement meeting, to be held during the month of February. The one-on-one meeting can be conducted either by Zoom or telephone. The community engagement meeting should be held in the City Council chambers.

We propose that the strategic planning workshop meeting should be held during the month of March at an off-site location such as a hotel meeting room or a community center.

Fees for Service:

- Please see the attached Exhibit "A" which outlines the fees for service for this engagement.



Dale S. Sugerman, Ph.D.

Accepted:

Ken Cassel, City Manager

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EXHIBIT A

<u>ITEM</u>	<u>NUMBER</u>	<u>RATE</u>	<u>AMOUNT</u>
Strategic Planning Workshop Days	2	\$ 3,750.00	\$ 7,500.00
Individual Interviews of Elected Officials	5	175.00	875.00
Public Meeting- 4 hours	4	225.00	900.00
Report Writing	4	125.00	500.00
Total Anticipated Expense*			\$ 9,775.00

* If the final Strategic Plan is presented at a public meeting, that rate will be \$225.00/hour of attendance.

Travel time: no charge

Telephone time: no charge

Invoice payment terms: Invoice billed monthly; net 30 days