



City Council Meeting Agenda

Our Vision: A well-planned lakeside community of quality neighborhoods, distinctive amenities, diverse employment, and cultural charm. Rowlett: THE place to live, work and play.

Monday, January 5, 2026

6:00 PM

Municipal Building – 4000 Main

Pursuant to Texas Government Code Section 551.127, on a regular, non-emergency basis, members may attend and participate in the meeting remotely by video conference. Should that occur, a quorum of the members, including the presiding officer, will be physically present at the location noted above on this Agenda.

As authorized by Section 551.071 of the Texas Government Code, this meeting may be convened into closed Executive Session for the purpose of seeking confidential legal advice from the City Attorney on any agenda item herein.

The City of Rowlett reserves the right to reconvene, recess or realign the Regular Session or called Executive Session or order of business at any time prior to adjournment.

Process for Public Input: If you are not able to attend in person, you may complete the [Public Input Form](#) on the City's website by 3:30 p.m. the day of the meeting. All forms will be forwarded to the City Council prior to the start of the meeting.

For in-person comments, request to speak forms/instructions are available inside the door of the City Council Chambers.

- 1. Call to Order**
- 2. Executive Session**
- 3. Reconvene Into Open Session and Take Any Necessary or Appropriate Action on Closed/Executive Session Matters**
- 4. Citizens' Input**

At this time, comments will be taken from the audience on any topic. No action can be taken by the Council during Citizens' Input.
- 5. Work Session**
 - 5.A.** Strategic Planning Consultant Candidate Firm Presentations (RFP 2025-166-B).
 - 5.B.** Receive Short Term Rental Subcommittee Report and Recommendations.
 - 5.C.** Presentation on Residential Lighting Standards and a Comparative Analysis and Code Review.
- 6. Discuss Consent Agenda Items for January 6, 2025, City Council Meeting**
- 7. Adjournment**

Deborah Sorensen

Deborah Sorensen, TRMC, MMC, City Secretary

I certify that the above notice of meeting was posted on the bulletin boards located inside and outside the doors of the Municipal Center, 4000 Main Street, Rowlett, Texas, as well as on the [City's website](#) on December 29, 2025, by 5:30 p.m.

City of Rowlett City Council meetings are available to all persons regardless of disability. If you require special assistance, contact the City Secretary at 972-412-6109 or write 4000 Main St., Rowlett, Texas, 75088, at least 48 hours in advance of meeting.

City of Rowlett ~ 4000 Main Street, Rowlett TX 75088 ~ www.rowlett.com

Meeting Date: 1/5/2026

Agenda Item: 5.A.

Title

Strategic Planning Consultant Candidate Firm Presentations (RFP 2025-166-B).

Staff Representative

Kristoff Bauer, Deputy City Mgr

Executive Summary

The City issued RFP 2025-166-B Strategic Planning Services to select and engage a consultant with proven expertise in working with local governments or municipal organizations. The purpose of this project is to develop a forward-looking, comprehensive strategic plan that will serve as a guiding document for the City's growth and evolution. Staff has requested that the three finalists provide the City Council with a presentation to assist with the selection of a firm for this engagement.

Strategic Priority and Goal(s)

Background Information

The City solicited proposals from qualified consultants that have experience with local government or municipal organizations to create a strategic plan for the City through a comprehensive and data-driven planning process. The City received eleven (11) responses by the stated deadline of July 31, 2025.

Discussion

The proposals were evaluated by an evaluation committee comprised of three (3) staff members representing Human Resources and the City Manager's Office. Evaluations were based on the following:

Criteria	Description	Points
EXPERIENCE & QUALIFICATIONS	Proven proficiency in strategic planning for local government, along with pertinent project examples and the qualifications of essential personnel. This includes references and a clear comprehension of municipal challenges, as evidenced in Article VIII. Submittals, Sections C and G.	30
PROJECT APPROACH & METHODOLOGY	The proposed methodology for project management, research, stakeholder engagement, and plan development exhibit high quality and clarity. Demonstrates innovation, utilizes data-driven analysis, and aligns with the objectives of the City, as evidenced in Article VIII. Submittals, Section D.	25
IMPLEMENTATION, MONITORING & REPORTING	Practicality and comprehensiveness of the implementation strategy, which encompasses quantifiable objectives, responsibility, oversight systems, and reporting frameworks to guarantee the success and flexibility of the plan, as evidenced in Article VIII. Submittals, Section E.	20
PROJECT TIMELINE	Ability to comply with the City's deadlines and resource accessibility. This includes the clarity and sensibility of the schedule, as evidenced in Article VIII. Submittals, Section F.	15
COST	The total cost to provide all services, as evidenced in Article VIII. Submittals, Section H.	10
TOTAL POINTS		100

After completion of the evaluations, the three highest-ranked firms were asked to provide the City Council with a presentation. The scoring is attached and the three firms that will be presenting are:

- Baker Tilly
- Strategic Government Resources (SGR)
- The Majorando Group

The proposals of these three firms are attached.

The proposed project facilitator for each firm will have fifteen (15) minutes to introduce their team and its qualifications, outline their proposed processes, and explain how they will assist Council in identifying and developing consensus regarding the elements of their strategic plan. Any systems, processes, or programs to track the implementation of the strategic plan should also be described. Community engagement is not to be included in the scope of services. An additional fifteen (15) minutes following each presentation is reserved for Council questions.

Financial/Budget Implications

N/A

Recommended Action

Council will be asked to rank the firms after the presentations. Staff will negotiate a final contract based on that ranking to be presented to the City Council at a future Regular Meeting for consideration.

Attachments

1. 2025-166-B RFP Packet
2. 2025-166-B Proposal Summary
3. 2025-166-B Proposal - Strategic Government Resources
4. 2025-166-B Response - Baker Tilly - reduced
5. 2025-166-B Proposal - The Mejorando Group - reduced

**City of Rowlett
RFP No. 2025-166-B
Strategic Planning Services**



Important Dates

Pre-Proposal Meeting:	July 23, 2025 at 10:00 A.M.
Questions Deadline:	July 24, 2025 at 12:00 P.M.
Proposals Due:	July 31, 2025 at 2:00 P.M.



STANDARD TERMS AND CONDITIONS FOR PROCUREMENTS

Revised February 12, 2025

1. **APPLICABILITY:** These standard terms and conditions apply to all goods or services procured by the City of Rowlett, Texas ("City"), unless otherwise stated in the specifications. The instructions contained herein shall be incorporated into the request for bids/proposals or other procurement opportunity advertisement as well as any subsequent purchase order(s) issued for goods or services and shall be included as part of the specifications issued herewith.
2. **NOTIFICATION:** The City advertises formal procurement opportunities through www.rowlettx.gov, bidnet direct by SOVRA, and *The Dallas Morning News*. The City shall not be responsible for information distributed by sources other than those listed.
3. **ADDENDA:** Any revisions to the information contained herein or in the request for bids/proposals will be issued in the form of one or more addenda. The sole issuing authority shall be vested in the City of Rowlett Purchasing Office. If addenda containing material changes to the specifications or pricing form are issued, the vendor shall acknowledge receipt of such addenda in the designated section in the Bid/Proposal document. It is the responsibility of the bidder/proposer to obtain and acknowledge any and all addenda. Failure to acknowledge receipt of any addenda may be cause to deem such submission non-responsive.
4. **SILENCE OF SPECIFICATION:** The apparent silence of the provided specifications as to any detail or the apparent omission from these specifications of a detailed description concerning any point, shall be regarded as meaning that only the best commercial practices are to prevail. All interpretations of the specifications shall be made on the basis of this statement.
5. **MINOR DEFECT:** The City reserves the right to waive any minor defect, irregularity, or informality in any bid/proposal. Minor defects, irregularities or informalities will not affect the end product/performance intended by the specifications. The City also reserves the right to reject any or all bids/proposals with or without cause prior to award.
6. **ELECTRONIC SUBMISSIONS:** The City utilizes bidnet direct by SOVRA to advertise and receive bids and proposals electronically over the Internet. Electronic submissions through bidnet direct by SOVRA shall be electronically signed and dated by a duly designated representative or agent of the company submitting the bid/proposal and submitted prior to the stated deadline date and time. Vendors should clearly and concisely provide all requested information as stated in the bid/proposal document. Failure to provide the requested information may be reason to deem such submission non-responsive.
7. **PAPER SUBMISSIONS:** Paper submissions shall be submitted on the forms provided by the City and must be signed and dated by a duly designated representative or agent of the company submitting the bid/proposal. Vendors shall clearly and concisely provide all requested information as stated in the bid/proposal document. Failure to provide the requested information may be reason to deem such submission non-responsive.
8. **PRESENTATION OF BIDS/PROPOSALS:** Paper submissions shall be presented to City Action Center, 4000 Main Street, Rowlett, Texas 75088, prior to the stated deadline date and time. Paper submissions shall be presented in a sealed envelope with vendor's name and the bid/proposal number clearly identified on the outside of the envelope.

9. **LATE SUBMISSIONS:** The date/time stamp located in the City Action Center serves as the official time clock. Submissions received after the stated deadline date and time shall be refused and returned unopened. The City is not responsible for issues encountered with methods of delivery.
10. **PRICING:** Prices offered shall be submitted for units of quantity as specified in the bid/proposal document, extended and totaled. In the case of a discrepancy in the extended price, the unit price shall govern and control. Any alteration, strike-through or erasure of a unit price or extended price made prior to bid/proposal opening shall be initialed by the signer of the bid/proposal, guaranteeing authenticity.
- Prices offered **cannot** be altered or amended after the submission deadline. Bids may not be changed for the purpose of correcting an error in bid price after bid opening.
11. **PROPRIETARY INFORMATION:** All material submitted to the City is subject to public disclosure upon receipt, pursuant to the Texas Open Records Act. If vendor does not desire proprietary information in the bid to be disclosed, each page must be identified and marked proprietary at the time of submittal. The City will, to the extent allowed by law, endeavor to protect such information from disclosure. The final decision as to what information must be disclosed, however, lies with the Texas Attorney General. Failure to identify proprietary information will result in all unmarked sections being deemed non-proprietary upon public request.
12. **TAXES:** The City is exempt from paying federal excise and transportation taxes and Texas State or local sales and use taxes. Tax shall not be included in prices offered. A Tax Exempt Form will be provided by the City upon request. A request for a Tax Exempt Form can be submitted in writing to purchasing@rowlett.com or by contacting the Purchasing Office at 972.412.6189.
13. **WITHDRAWAL OF OFFER:** Vendor agrees that an offer may not be withdrawn or cancelled for a period of ninety (90) days following the date and time designated for the receipt of the bid/proposal without written approval of the Purchasing Manager.
14. **F.O.B./DAMAGE:** Prices offered shall be F.O.B. Final Destination, Rowlett, Texas, and shall be all inclusive of shipping, handling and packaging costs. The City accepts and assumes no liability for goods delivered in damaged or unacceptable condition. The successful vendor shall be responsible for handling all claims with carriers, and in case of damaged or unacceptable goods, shall ship replacement goods immediately upon notification by the City.
15. **PREPARATION COST:** All costs associated with the preparation of an offer, bid, or proposal shall be borne by the vendor. The City will not be liable for any costs associated with the preparation, transmittal, or presentation of submissions, or with any materials submitted in response to the request for bid/proposal.
16. **TESTING:** At the City's discretion, testing may be required prior to award of the bid/proposal or prior to delivery of goods or services. Testing shall be performed without expense to the City.
17. **SAMPLES:** At the City's discretion, samples may be required prior to award of the bid/proposal or prior to delivery of goods or services. Samples shall be provided at no cost to the City. Samples should not be enclosed with submission unless specifically requested.
18. **QUALITY:** Any catalog, brand names, or manufacturer's reference in the bid/proposal packet is merely descriptive and **not** restrictive and is intended to indicate the type and minimum quality level desired for comparison purposes, unless otherwise stated herein to the contrary. All products and/or optional equipment offered shall be new and of current manufacture. No items of a demonstrator, leased, reconditioned, rebuilt, repossessed or used nature shall be considered, unless otherwise specifically stated herein.

19. **BID/PROPOSAL OPENINGS**: All bids/proposals will be read aloud at the City's scheduled opening for the designated bid/proposal. However, the reading of an offer shall not be construed as a comment on the responsiveness of such offer, or as any indication that the City accepts such offer as responsive. Neither shall such reading be construed as a comment on the responsibility of the bidder/proposer.

The City will make a determination regarding the responsiveness of offers submitted based upon compliance with all applicable laws and the City's purchasing guidelines and project documents including, but not necessarily limited to, the bid/proposal specifications and contract documents. The City will notify the successful vendor upon award of the contract; and, according to State law all offers received will be available for inspection after award.

For processes other than low bid or best value bid, only the names of vendors will be read aloud at the scheduled opening. Pricing information will not be released until after award of the contract.

20. **SUMMARY SHEET**: Bid/Proposal summary results are typically published within two (2) business days after the scheduled opening. Interested parties desiring a copy of a bid/proposal summary sheet may request the same by submitting a written request to purchasing@rowlett.com. **RESULTS WILL NOT BE RELAYED OVER THE TELEPHONE.**

21. **GRATUITIES**: Gratuities in the form of entertainment, gifts, or otherwise offered or given by the vendor, or any agent or representative of the vendor, to any officer or employee of the City with a view toward securing a contract or securing favorable treatment with respect to the awarding or amending or the making or any determinations with respect to the performing of such a contract, are not permissible. In the event this contract is cancelled by City pursuant to this provision, City shall be entitled, in addition to any other rights and remedies, to recover or withhold the amount of the cost incurred by vendor in providing such gratuities.

22. **ANTI-COLLUSION**: In submitting an offer, vendor certifies that they have not participated in nor have they been party to any collusion, price fixing or any other illegal or unethical agreements with any company, firm or person concerning the pricing offered.

23. **NO PROHIBITED INTEREST**: Vendor acknowledges awareness of the laws, City Charter, and City Code of Ethics regarding conflicts of interest. No officer, employee or agent of the City shall participate in the negotiation, selection, discussion, award or administration of a contract or procurement supported by public funds if: 1) that individual has a substantial interest in a person or entity, as defined by Section 2-463 of the City's Code of Ordinances and/or Chapter 171 of the Texas Local Government Code, that is the subject of the contract or procurement; or 2) a conflict of interest, either real or apparent, would be involved, as defined therein.

24. **CONFLICT OF INTEREST**: In accordance with Chapter 176, Local Government Code, a person who is a vendor and has a business relationship, as those terms are defined by Section 176.001(1-a), with the City and meets requirements under Section 176.006(a) is required to file a Conflict of Interest Questionnaire with the City Secretary not later than the 7th business day after the date the person becomes aware of facts that require the statement to be filed. See Section 176.006, Local Government Code. A person commits an offense if the person knowingly violates Section 176.006, Local Government Code. An offense under this section is a Class C misdemeanor.

A complete copy of Chapter 176 of the Local Government Code may be found at <https://statutes.capitol.texas.gov/Docs/LG/htm/LG.176.htm>.

25. **NON-RESIDENT BIDDERS**: Texas Government Code, Chapter 2252: Non-Resident Bidders. Texas law prohibits city and governmental units from awarding contracts to a non-resident bidder/proposer unless the

amount of such bid is lower than the lowest bid by a Texas resident by the amount a Texas resident would be required to underbid the non-resident bidder/proposer on a bid/proposal for goods and services in the non-resident bidder's state.

26. **DELINQUENT TAXES:** Any person, firm, or corporation that is in arrears to the City for delinquent taxes or otherwise, will not be recommended for award of any bid/proposal until the arrearage has been cleared in writing. If a contractor or vendor becomes delinquent while a contract is in force, payment for goods or services provided to the City under said contract or purchase order may be withheld until the arrearage has been cleared in writing.
27. **MINIMUM STANDARDS FOR RESPONSIBILITY:** A prospective vendor must affirmatively demonstrate responsibility. The City of Rowlett may request representation and other information sufficient to determine vendor's ability to meet the minimum standards including but not limited to:
- A. Have adequate financial resources, or the ability to obtain such resources as required
 - B. Ability to comply with the required or proposed delivery schedule
 - C. Have a satisfactory record of performance
 - D. Have a satisfactory record of integrity and ethics
 - E. Be otherwise qualified and eligible to receive an award
28. **AWARD OF CONTRACT:** The City reserves the right to award single or multiple contracts for the goods or services as stated herein, or to reject any and all bids. Furthermore, the City reserves the right to take administration costs into consideration when awarding to multiple vendors.
- The City may award bids/proposals to the lowest responsive responsible vendor(s), or to the vendor(s) who provides goods or services at the best value to the City. If using the best value method, the selection criteria will be clearly identified in the bid/proposal document. The best value method may take into consideration, in whole or in part, by way of illustration and not limitation, the following criteria:
- A. The purchase price
 - B. The reputation of the vendor and of the vendor's goods or services
 - C. The quality of the vendor's goods or services
 - D. The extent to which the goods or services meet the City's needs
 - E. The vendor's past relationship with the City
 - F. The total long-term cost to the City to acquire the vendor's goods or services
 - G. Any relevant criteria specifically listed herein
29. **ACCEPTANCE:** Vendor agrees that acceptance of any or all items by the City within a reasonable period of time, not to exceed one hundred twenty (120) days following the date and time designated for the receipt of the bid/proposal, shall be binding upon vendor. Vendor shall thereafter execute all documents necessary to enter into a contract in a form acceptable to and properly executed by the City to provide such goods and services.
30. **CONTRACT PERIOD:** Unless otherwise stated in the specifications contained herein, the contract period for this bid/proposal will be for one (1) year upon City approval, with four (4) optional one-year renewal periods at the option of the City. All contract periods, including all renewal periods, will be subject to the City's availability of funds.
31. **FUNDING:** The City is a home-rule municipal corporation operated and funded on a fiscal year basis from October 1 to September 30. Accordingly, the City reserves the right to terminate at any time, without liability to the City, any contract for which funding is not available in a subsequent fiscal year.

32. **ASSIGNMENT**: The successful vendor shall not sell, assign, transfer or convey any contract, in whole or in part, to any other person or party without the prior written consent of the City obtained through the City's Purchasing Office.
33. **INTERLOCAL AGREEMENT**: The successful vendor agrees to extend prices for goods and services under the same terms and conditions of this bid/proposal to all governmental entities that have entered into, or may hereafter enter into, interlocal cooperative purchasing agreements with the City
34. **CHANGE ORDER**: The City reserves the right to modify or change plans and specifications as deemed necessary at any time, including after the performance of the contract has commenced, to decrease or increase the quantity of work to be performed, materials, equipment or supplies to be furnished, or address other provisions of the contract as approved by the City Manager or City Council, and as appropriate under state law. No oral statement of any person shall modify or otherwise change, or affect the terms, conditions or specifications stated in the contract. All change orders or modifications to the contract shall be documented in written form by the City and acknowledged by the contracted vendor. **All change orders and modifications to the contract shall be processed through the Purchasing Office only.**
35. **DELIVERY PROMISE – PENALTIES**: Where indicated, vendors must provide the number of calendar days required to deliver goods or services to the City after receipt of order (ARO). **Do not quote shipping dates.** When a delivery delay can be foreseen, the vendor shall provide advance notice to the Purchasing Manager, who shall have the right to extend the delivery date if the reasons for delay are acceptable. Default in promised delivery, without acceptable reason(s), or failure to meet specifications as contained herein or in the contract documents, authorizes the Purchasing Office to purchase goods or services from an alternate source. The defaulting vendor may be subject to re-procurement costs.
36. **DELIVERY TIMES**: Unless otherwise specified herein, deliveries will only be accepted during normal working hours at the designated City location(s).
37. **INSPECTION**: Upon receipt of goods or services, the same will be inspected for compliance with the specifications contained herein or in the contract documents. If the goods or services do not pass inspection, the vendor will be required to remedy the situation at the vendor's sole expense. The vendor will be required to retrieve the rejected goods at the delivery point and provide the necessary repairs of or replacement and return of the goods in new condition to the original point of delivery; or re-perform services in accordance with the terms and conditions of the contract and to the City's satisfaction.
38. **INVOICES**: Invoices shall be submitted to the attention of the ordering department, P.O. Box 99, Rowlett, Texas 75088, or electronically to the appropriate department representative.
39. **PAYMENT TERMS**: Payment terms are net 30 days, unless otherwise specified by the City in the bid/proposal document.
40. **AUDIT**: The City shall have access to, and the right to examine, monitor and audit all records, documents, conditions and activities related to contracts awarded by the City. It shall be the responsibility of the vendor to maintain records associated with this procurement for a period of three (3) years after completion of the contract, or in the event of litigation, a claim or audit, the records shall be retained until the resolution of such litigation, claim or audit.
41. **INSURANCE**: The City requires vendor(s) to carry the minimum insurance as required by the greater of the requirements contained in state laws or the insurance requirements contained in the contract documents.

42. **PRICE ESCALATION**: Unless otherwise stated in the specifications herein, prices must remain firm for the initial term and any renewal terms of the contract, except that the contracted vendor may request an adjustment at the time of contract renewal by submitting a request in written form to the Purchasing Manager. Basis for price escalation should be based on the Consumer Price Index for the most recent twelve-month period reported for the Dallas-Fort Worth area. The contracted vendor shall provide the City with copies of the appropriate indices for verification purposes. The City reserves the right to approve or reject any and all requests for price escalations.
43. **PRICE REDUCTION**: If during the life of the contract, the contracted vendor's net prices to other customers for the same goods or services are lower than the City's contracted prices, an equitable adjustment shall be made in the contract price in favor of the City.
44. **INDEMNITY**: The bidder shall defend, indemnify and hold the City, its current, former and future officers, agents and employees harmless from any and all costs, expenses, suits, demands, claims, liabilities, liens, encumbrances or damages, including attorneys' fees and costs of suit, of any character, name and description, incurred or resulting from any injuries or damages received or sustained by any person, persons or property on account of any intentional wrongful conduct or negligent act, omission, or fault of the successful bidder, or of any agent, employee, subcontractor or supplier for which the successful bidder is responsible in the execution of, or performance under, any contract which may result from bid award and the bidder so agrees upon the submission of the bid. The bidder shall deliver, if so requested by the City, a written release of all liens or other proper evidence of same, to the satisfaction of the City prior to the issuance of final payment by the City.
45. **INDEMNITY; PATENT RIGHTS**: The bidder/proposer agrees to indemnify and hold harmless the City from any claim involving patent right infringement or copyright infringement on goods or services supplied to the City pursuant to the contract documents.
46. **PROTESTS**: All protests regarding the solicitation process must be submitted in written form to the Purchasing Manager within five (5) working days following the opening of bids/proposals. This includes all protests relating to legal advertisements, deadlines, bid/proposal openings, and all other related procedures under the Local Government Code, as well as any protests relating to alleged improprieties or ambiguities in the specifications contained herein or in the contract documents.
- Post-award protests must be submitted in written form to the Purchasing Manager within five (5) working days after award.
- The protest must include, at a minimum, the name of the protester, bid/proposal number or description of goods or services, and a statement of the grounds for the protest. The Purchasing Manager, having authority to make the final determination, will respond within ten (10) working days to each substantive issue raised in the protest. Allowances for reconsiderations shall be made only if data becomes available that was not previously known, or if there has been an error of law or regulation.
47. **TERMINATION FOR DEFAULT**: The City reserves the right to enforce the performance of the contract in any manner prescribed by law and deemed to be in the best interest of the City in the event of breach or default of the contract. The City reserves the right to terminate the contract immediately in the event the contracted vendor fails to meet delivery schedules or otherwise perform in accordance with the specifications contained herein or in the contract documents. Breach of contract or default authorizes the City to award the contract to another vendor, or purchase from an alternate source, and charge the full increase in cost plus any additional administrative costs incurred by the City to the defaulting contracted vendor.

48. **REMEDIES**: The successful vendor and the City agree that each party may have rights, duties, and remedies available as stated in the Uniform Commercial Code and any other available remedy, whether in law or equity.
49. **VENUE**: The validity of the contract and of any of its terms or provisions, as well as the rights and duties thereunder or under the contract documents, shall be governed by and construed in accordance with the laws of the State of Texas. Exclusive venue for any legal action shall lie in the state courts of Dallas County, Texas.
50. **ENERGY BOYCOTT**: In accordance with Chapter 2274, Texas Government Code (Acts 2021, 87th Leg., S.B. 13), the City may not enter into a contract with a company, excluding a sole proprietorship, with 10 or more full-time employees for goods or services valued at \$100,000 or more unless the contract contains a written verification from the company that the company: (1) does not boycott energy companies; and (2) will not boycott energy companies during the term of the contract. The signatory executing the Contract on behalf of Seller verifies Seller does not boycott energy companies and will not boycott energy companies during the term of the Contract. The foregoing verification is made solely to comply with Section 2274.002, Texas Government Code, and does not apply if the City determines the requirements of Subsection 2274.002(b) are inconsistent with the City's constitutional or statutory duties related to the issuance, incurrence or management of debt obligations or the deposit, custody, management, borrowing or investment of funds.
51. **FIREARMS**: In accordance with Chapter 2274, Texas Government Code (Acts 2021, 87th Leg., S.B. 19) the City may not enter into a contract with a company, excluding a sole proprietorship, with 10 or more full-time employees for goods or services valued at \$100,000 or more unless the contract contains a written verification from the company that the company: (1) does not have a practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association; and (2) will not discriminate during the term of the contract against a firearm entity or firearm trade association. The signatory executing the Contract on behalf of Seller verifies Seller does not have a practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association and will not discriminate during the term of the contract against a firearm entity or firearm trade association. The foregoing verification is made solely to comply with Section 2274.002, Texas Government Code, and does not apply if the City contracts with a sole-source provider or if the City does not receive any bids, if applicable, from a company that is able to provide the required verification.
52. **CRITICAL INFRASTRUCTURE**: In accordance with Chapter 2274, Texas Government Code, the City may not enter into a contract or agreement with a company, excluding a sole proprietorship, with 10 or more full-time employees for goods or services valued at \$100,000 or more (1) if the company would be granted direct or remote access to or control of critical infrastructure in Texas, excluding access specifically allowed by the City for product warranty and support purposes and (2) if the City knows the company is (A) owned by or the a majority of stock or other ownership interest of the company is held or controlled by (i) individuals who are citizens of China, Iran, North Korea, Russia, or a designated country or (ii) a company or other entity, including a governmental entity, that is owned or controlled by citizens of or is directly controlled by the government of such countries, or (B) headquartered in such countries. The signatory executing the Contract on behalf of Seller represents that neither Seller nor any of its parent companies, wholly owned subsidiaries, majority-owned subsidiaries, and other affiliates is a company of which the City may not contract pursuant to Section 2274.0102, Texas Government Code. The foregoing verification is made solely to comply with Section 2274.0102, Texas Government Code.
53. **ANTI-BOYCOTT ISRAEL VERIFICATION**: In accordance with Chapter 2271, Texas Government Code, the City may not enter into a contract with a company, excluding a sole proprietorship, with 10 or more full-time employees for goods or services valued at \$100,000 or more unless the contract contains a written verification from the company that it: (1) does not boycott Israel; and (2) will not boycott Israel during the term of the contract. The signatory executing the Contract on behalf of Seller verifies that Seller and its parent company, wholly owned subsidiaries, majority-owned subsidiaries, and other affiliates, if any, do not boycott Israel and,

to the extent the Contract is a contract for goods or services, will not boycott Israel during the term of the Contract. As used in the foregoing verification, "boycott Israel" means refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations specifically with Israel, or with a person or entity doing business in Israel or in an Israeli-controlled territory, but does not include an action made for ordinary business purposes. The signatory understands "affiliate" to mean an entity that controls, is controlled by, or is under common control with the signatory and exists to make a profit. This section does not apply to a Vendor which is a sole proprietorship and/or which has less than 10 full-time employees. This section does not apply to a contract valued at less than \$100,000.

54. **IRAN, SUDAN, AND FOREIGN TERRORIST ORGANIZATIONS:** The signatory executing the Contract on behalf of Seller represents that neither Seller nor any of its parent company, wholly-owned subsidiaries, majority-owned subsidiaries, and other affiliates is a company identified on a list prepared and maintained by the Texas Comptroller of Public Accounts under Section 2252.153 or Section 2270.0201, Texas Government Code, and posted on any of the following pages of such officer's internet website:

<https://comptroller.texas.gov/purchasing/docs/sudan-list.pdf>,
<https://comptroller.texas.gov/purchasing/docs/iran-list.pdf>, or
<https://comptroller.texas.gov/purchasing/docs/fto-list.pdf>.

The foregoing representation is made solely to comply with Section 2252.152, Texas Government Code, and to the extent such Section does not contravene applicable Federal law and excludes the entity and each of its parent company, wholly-owned subsidiaries, majority-owned subsidiaries, and other affiliates, if any, that the United States government has affirmatively declared to be excluded from its federal sanctions regime relating to Sudan or Iran or any federal sanctions regime relating to a foreign terrorist organization. The signatory understands "affiliate" to mean any entity that controls, is controlled by, or is under common control with the signatory and exists to make a profit.

City of Rowlett RFP No. 2025-166-B Strategic Planning Services

I. Introduction

The City of Rowlett ("City") is soliciting proposals from qualified and experienced consultants ("Consultant") experienced with local government or municipal organization to create a strategic plan for the City through a comprehensive, data-driven, and community-engaged planning process, in accordance with the terms, conditions, and requirements set forth in this request for proposal ("RFP") document. The resulting strategic plan should be completed by December 1, 2025. The contract will be awarded to the consultant providing the best value to the City, as determined by the evaluation criteria as stated herein.

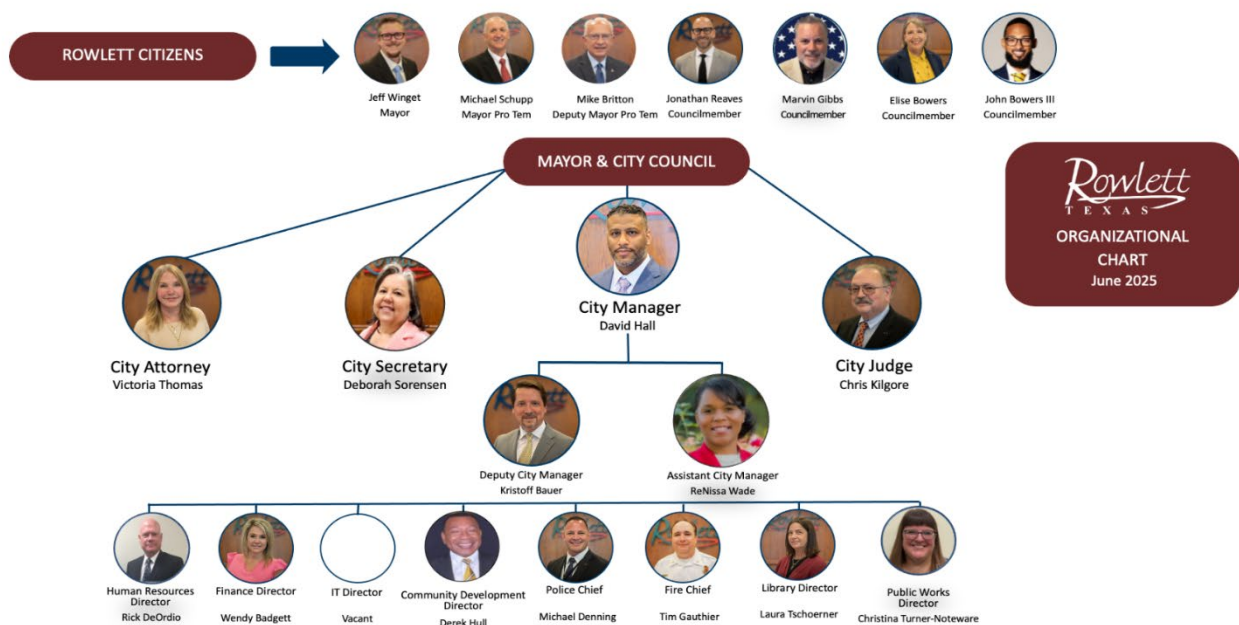
The City reserves the right to award any or all line items, in whole or in part, to one or more consultants. Any services stated herein are an accurate reflection of the City's anticipated needs. However, due to budget contingencies, services may be adjusted prior to award, or at any time during the contract period. At no time will adjustments to the prices offered be imposed on the City. Prices will be held firm during the contract period.

The successful Consultant will be required to execute a Consultant Services Agreement. A sample Agreement is available for viewing upon request, in the Purchasing Office.

II. General Information

Rowlett is home to nearly 68,000 residents and is nestled on the shores of Lake Ray Hubbard in far east Dallas County and a portion of west Rockwall County. Rowlett is a Home Rule City subject to the State of Texas laws, rules and regulations. The City Council consists of a Mayor and six (6) Councilmembers who are elected at-large representing all residents within the City limits, with each serving a staggered three-year term.

The City operates under a system of local government called the Council/Manager form. The elected officials are the community leaders and policy makers who establish a vision for the City, and who hire the City Manager to carry out that policy and ensure that all residents are being equitably served. The City Manager leads, directs, and coordinates all City operations and staff, who help ensure the smooth and efficient delivery of services. The organizational chart for the City is as follows:



III. Pre-Proposal Conference

An online pre-proposal conference will be held for this project at 10:00am, July 23, 2025. Attendance is optional, but interested parties are strongly encouraged to attend. To participate in the pre-proposal conference, please use the following:

Meeting ID: 240 248 489 338 9

Passcode: Jj3Hd2fU

Link: https://teams.microsoft.com/join/19%3ameeting_Zjc0YThiNjktMWNkNS00ZGRmLWE1ZWU0ThINTAxNjVmYjdk%40thead.v2/0?context=%7b%22Tid%22%3a%2285803b12-c237-45fd-bc07-0d2e834e5e62%22%2c%22Oid%22%3a%227d17b5ea-5a46-4540-84b7-f45b211dff03%22%7d

IV. Public Opening

This is an informal process. Therefore, no public opening will be held for this solicitation.

V. Project Description

The City is issuing this RFP to select and engage a Consultant with proven expertise in working with local governments or municipal organizations. The purpose of this project is to develop a forward-looking, comprehensive strategic plan that will serve as a guiding document for the City's growth and evolution.

VI. Scope of Services

The following Scope of Services is envisioned for the project and should be considered when responding to the RFP. Nothing in this description shall be construed as limiting the potential scope of work to this description or to require that this description be included in the final scope of work for the project. Nothing in the following Scope of Services should be construed as limiting the types of work that a potential Consultant may address in a response to this Request for Proposals. Consultant should address all services which, based on their experience, are deemed necessary to achieving the City's goals.

A. Qualifications

1. Consultant shall have been actively engaged in strategic planning services for a minimum of five (5) years under its current name and in good standing with a track record of performance and must provide evidence of such. If name changes have occurred in the past ten (10) years, provide these name changes in chronological order. Recent start-up businesses do not meet the requirements of this solicitation.

NOTE: A start-up business is defined as a new company that has no previous operational history or expertise in the relevant business and is not affiliated with a company that has that history or expertise

2. Consultant shall operate as an independent contractor and not as an agent, representative, partner, or employee of the City, and shall control the operations at the work site, and be solely responsible for the acts of omissions of the successful consultant(s) employees or agents.
3. Consultant shall have verifiable experience specializing in local government or municipal organizations developing a strategic plan.
4. Consultant shall comply with all applicable governmental laws and regulations.

B. Services

The services listed below are not intended to be a comprehensive list of what the Consultant will provide. The final scope of services will be developed in collaboration with the selected Consultant. **The scope of services will, at a minimum, include the following:**

1. Strategic Plan Development:

- a. Facilitation of Planning Process: Facilitate a strategic planning process to engage key stakeholders (e.g., leadership team, staff, City Council) in the development of the strategic plan.
- b. Data Collection and Analysis: Gather, organize, and analyze relevant data to inform the strategic planning process.
- c. Vision, Mission, and Values: Assist in creating, reviewing, or refining the organization's vision, mission statement, and core values, if needed.
- d. Strategic Goals and Objectives: Facilitate the development of clear, measurable, and achievable strategic goals and objectives that align with the organizational mission and vision.
- e. Action Plan: Develop an actionable plan that outlines specific steps, timelines, responsible parties, and resource requirements for achieving the strategic goals.
- f. Communications Plan: Develop a robust communication strategy to effectively communicate the strategic plan to members and stakeholders.
- g. Performance Metrics: Define key indicators and outcomes that will serve as the basis for measuring the plan's success.
- h. Final Strategic Plan Document: Produce a comprehensive strategic plan document outlining all aspects of the plan.

VII. Insurance Requirements

ALL RESPONDENTS must submit, with the proposal, proof of insurance coverage as stipulated in **Exhibit A** to this proposal document. Proof shall be by submission of copies of current policies or current Certificates of Insurance, including the effective dates of coverage. **Any provisions outlined will be required of the successful Consultant only.** Prior to the execution of this contract, the successful Consultant will supply the Purchasing Office with an original certificate of insurance evidencing the stated requirements and provisions. This insurance shall be effective for the contract duration and renewal certificates shall also be supplied upon expiration.

VIII. Submittals

In order for your proposal to be considered responsive, the following information should be submitted in the order outlined below. Failure to provide requested information may cause your proposal to be deemed as non-responsive.

A. Transmittal Letter (Label as Section A)

1. Include a transmittal letter summarizing your understanding of this engagement, and why you believe yourself to be the best Consultant for this project.

B. Consultant Information (Label as Section B)

1. Consultant information should include a cover letter containing legal company name, address, telephone number, and number of years in business. Also include acknowledgement of all Addendums issued for this solicitation.

2. Include name of contact person authorized to submit a proposal and negotiate a contract on behalf of your firm, including telephone number and email address.
3. If name changes have occurred in the past ten (10) years, provide these name changes in chronological order, if applicable.

C. Qualifications of Team Members (Label as Section C)

1. Identify the key professionals that will be actively involved in this engagement and describe their area of expertise and what role they will perform on the project team. Include an organizational chart showing the structure of the project team.
2. Provide resumes for key team members, including name, educational background, professional qualifications, time with the firm, and a list of relevant projects and their role in each.

D. Project Approach and Methodology (Label as Section D)

1. Describe the firm's philosophy, approach, and methodology to strategic planning in general.
2. Describe methodology for project management, research, stakeholder engagement, and plan development, and address how each demonstrates innovation, utilizes data-driven analysis, and aligns with the objectives of the City.
3. Describe successful methods used to engage a diverse range of stakeholders and the public, including communication plans, community dashboards, and training programs, while ensuring inclusivity and transparency.
4. Provide an example of a recently completed project(s) and provide details outlining your project management plan. Specifically, explain how you met deadlines and remained within budget.

E. Implementation, Monitoring and Reporting (Label as Section E)

1. Describe the proposed implementation strategy for this engagement, which should include quantifiable objectives, responsibility, oversight systems, and reporting frameworks to guarantee the success and flexibility of the plan.

F. Project Timeline (Label as Section F)

1. Submit a project timeline outlining each proposed phase and the associated deliverables for this engagement.

G. Experience and References (Label as Section G)

1. Provide a list of recently completed and currently active projects, along with a statement regarding your firm's current workload. Provide descriptions of several projects that are most similar to the work your firm may perform for the City and best exemplify your qualifications for this work, including location, client name, scope, total cost, and key team members and their roles.
2. Provide a recently completed strategic plan document for a local government or municipal organization similar to the scope of services outlined in this RFP.

3. Provide at least three (3) references for organizations of similar size, and same or similar scope of work as described in this RFP document. List a contact person for each reference and include full name, title, telephone number and email address.

H. Fee Schedule (Label as Section H)

1. Please submit a Fee Schedule outlining project phases, milestones, and pricing to provide all services as outlined in this RFP. All fees associated with providing the services must be included in order to be considered.

I. Additional Information (Label as Section I)

1. Proof of Insurance
2. List any exceptions to the Standard Terms and Conditions of Procurement or the RFP requirements for the City's consideration. If none, please include a statement indicating there are no exceptions.
3. Proposal Certification Form

IX. Evaluation Criteria

A review committee will judge the merit of proposals received in accordance with the requirements defined herein. Failure of vendor to provide in their proposal any information requested in this RFP may result in disqualification of the proposal. The sole objective of the review committee will be to select the Consultant(s) that provides the best value to the City. The contract will be awarded based on the following evaluation criteria:

Criteria	Description	Points
EXPERIENCE & QUALIFICATIONS	Proven proficiency in strategic planning for local government, along with pertinent project examples and the qualifications of essential personnel. This includes references and a clear comprehension of municipal challenges, as evidenced in Article VIII. Submittals, Sections C and G.	30
PROJECT APPROACH & METHODOLOGY	The proposed methodology for project management, research, stakeholder engagement, and plan development exhibit high quality and clarity. Demonstrates innovation, utilizes data-driven analysis, and aligns with the objectives of the City, as evidenced in Article VIII. Submittals, Section D.	25
IMPLEMENTATION, MONITORING & REPORTING	Practicality and comprehensiveness of the implementation strategy, which encompasses quantifiable objectives, responsibility, oversight systems, and reporting frameworks to guarantee the success and flexibility of the plan, as evidenced in Article VIII. Submittals, Section E.	20
PROJECT TIMELINE	Ability to comply with the City's deadlines and resource accessibility. This includes the clarity and sensibility of the schedule, as evidenced in Article VIII. Submittals, Section F.	15
COST	The total cost to provide all services, as evidenced in Article VIII. Submittals, Section H.	10
TOTAL POINTS		100

X. Interviews and Presentations

In fairness to all firms, requests for interviews prior to the closing time and date will not be permitted. Interviews with selected vendors may or may not be requested by the City after the closing date.

Selection may be made strictly from the information provided in the RFP. However, the City reserves the right to conduct interviews with and request presentations from any respondents.

XI. Best and Final Offer

The City reserves the right to request a best and final offer from any or all vendors. The City also reserves the right to reject any or all proposals, with or without cause, re-issue the RFP, or proceed in any manner determined to be in the best interest of the City.

XII. Questions Deadline

The City requires that all questions relating to this RFP be submitted in writing through bidnet, the City's eProcurement system, or to January Calhoun, Purchasing Manager, at jcalhoun@rowlett.com by **12:00pm on July 24, 2025. No questions will be answered over the phone.** Questions in regard to the scope of services will only be accepted until the stated deadline. Any changes to the RFP Documents will be made by City in the form of a written Addendum. Any changes made in any other manner will not be binding upon the City, and proposer may not rely upon them.

XIII. Submission or Delivery of Proposal

Proposals are due no later than July 31, 2025, at 2:00pm. Submissions will be received online, or in hard copy.

Submitting a proposal constitutes understanding and acceptance of all terms, conditions, instruction, glossary, specifications, forms and statements contained in this RFP document.

The date/time stamp located in the Purchasing Office serves as the official time clock. Late Submissions will not be considered. Submissions received after the stated deadline shall be refused and returned unopened. **The City is not responsible for issues encountered with methods of delivery.**

A. Online Submission

1. Proposals may be submitted online through bidnet, the City's eProcurement system, at the following link: <https://www.bidnetdirect.com/texas/cityofrowlett>.
2. Please ensure that you provide all required information, including attachments, combined and uploaded where indicated in bidnet.

B. Mailed/Delivered Submission

1. Proposal must be submitted with the RFP number and the respondent's name and address clearly indicated on the front of the envelope.
2. Please submit one (1) unbound original of your proposal and one (1) electronic copy on a thumb drive in a sealed envelope or package to the address listed below:

Delivery Address

City of Rowlett
Attn: Purchasing Manager
4000 Main Street
Rowlett, TX 75088

Mailing Address

City of Rowlett
Attn: Purchasing Manager
PO Box 99
Rowlett, TX 75030-0099

**RFP 2025-166-B
STRATEGIC PLANNING SERVICES
PROPOSAL CERTIFICATION FORM**

By submitting a proposal, the Consultant certifies that the Standard Terms and Conditions for Procurements, the RFP requirements, and all issued Addendums have been read and are fully understood, and it's the Consultant's intent to enter into negotiations for a contract for Strategic Planning Services. Consultant agrees to abide by the terms and statutory requirements governing the solicitation process.

All addenda shall be issued in written form by the Purchasing Office. The City is not bound by any oral representations, clarifications, or changes made in connection to the RFP by the City's employees, agents or consultants unless in the form of a properly issued Addendum.

The failure of the Consultant to contact the Owner to determine the issuance of any Addenda, or to acknowledge receipt of any and all of the Addenda issued in connection with this project, shall entitle the City, at its sole discretion, to (i) reject the proposal of the Consultant as being non-responsive, or (ii) to accept the proposal of the Consultant, in which event the Consultant agrees to be bound by all of the terms and conditions of each unacknowledged Addendum.

A. FIRM INFORMATION

Legal Name of Vendor: _____

Tax ID Number: _____ Telephone No: _____

State of Formation: _____ Year of Formation: _____

Address: _____

Contact Name and Title: _____

Contact Phone No: _____

Contact Email Address: _____

B. CERTIFICATION

I certify that I have the legal authority to bind the Consultant listed above, and I further certify that there are no objections to any of the terms and conditions listed in this RFP document, except as noted in Article VIII. Submittals, Section I. Additional Information, Item 2. (if applicable).

Signature of Authorized Representative: _____

Printed Name and Title of Authorized Representative: _____

Date of Certification: _____

Company shall procure and maintain for the duration of the contract, insurance coverages outlined herein which may arise from or be in connection with the performance of the work hereunder by the Company, his agents, representatives, employees or subcontractors. Any exceptions to the requirements or provisions herein shall be submitted in writing to the City's Risk Manager for consideration and approval. The decision of the City will be final. The cost of such insurance shall be borne by the Company.

1.0 GENERAL PROVISIONS

- 1.1 The Company shall obtain and maintain the minimum insurance coverage set forth in this section. By requiring such minimum insurance, the City of Rowlett shall not be deemed or construed to have assessed the risk that may or may not be applicable to the Company. The Company shall assess its own risks and if it deems appropriate and/or prudent, maintain higher limits and/or broader coverage. The Company is not relieved of any liability or other obligation assumed or pursuant to the Contract by reason of its failure to obtain or maintain insurance in sufficient amounts, duration, or types. The insurance requirements listed below do not replace any warranty or surety (performance, payment, or maintenance) bonds if required by preceding or subsequent sections of this contract.
- 1.2 Company shall cause each subcontractor employed by Company to purchase and maintain insurance of the type specified herein or cover such subcontractor under its insurance coverage.
- 1.3 The Company agrees that the insurance requirements specified in this section do not reduce the liability Company has assumed in any indemnification/hold harmless section of this contract.
- 1.4 City reserves the right to approve the security of the insurance coverage provided pursuant to this section by insurers including terms, conditions and the Certificate of Insurance. Failure of the Company to fully comply with requirements of this section during the term of this contract will be considered a material breach of contract and will be cause for immediate termination of the contract at the option of City.
- 1.5 Insurance coverage required by this section shall:
 - 1.5.1 Be on a primary basis, non-contributory with any other insurance coverage and/or self-insurance carried by City.
 - 1.5.2 Be with an insurer possessing an A-VII A. M. Best Rating or equivalent.

2.0 MINIMUM INSURANCE COVERAGE & LIMITS

- 2.1 Commercial General Liability. Company shall maintain commercial general liability and, if necessary, commercial umbrella or excess liability (umbrella or excess liability should be provided on follow-form policy).
- 2.2 Commercial general liability insurance shall be written on an ISO occurrence form CG 00 01 (or a substitute form providing equivalent coverage) and shall cover liability arising from premises, operations, independent Company's, product-completed operations, personal and advertising injury and liability assumed under an insured contract (including the tort liability of another assumed in a business contract).

2.3 City shall be included as an additional insured under the commercial general liability using ISO additional insured endorsement CG 20 10 07 04 and CG 20 37 07 04 or their equivalent, including coverage for City with respect to liability arising out of the completed operations of Company.

2.4 Limits of Insurance

Contracts between \$0 and \$1,000,000		
Type of Insurance	Amount of Insurance	Provisions
1. Commercial General (Public) Liability to include coverage for: a) Premises/Operations b) Products/Completed Operations c) Independent Contractors d) Personal Liability e) Contractual Liability	• \$1,000,000 each occurrence • \$2,000,000 general aggregate • \$2,000,000 Umbrella/ Excess Liability (follow-form)	City to be listed as additional insured and provided 30-day notice of cancellation or material change in coverage City to be provided a waiver of Subrogation
2. Business Auto Liability	• \$1,000,000 per occurrence • \$1,000,000 aggregate or; • \$1,000,000 combined single limits	City to be named as additional insured
3. Workers' Comp & Employers' Liability	• Statutory Limits • \$1,000,000 each accident	City to be provided a waiver of subrogation
4. Builders Risk Policy	• 100% of construction total	If Applicable
5. Other Coverages a) Professional Liability b) E & O coverage c) Cyber Liability	• To be determined by the City's Risk Manager on a per project basis	If Applicable

Contracts between \$1,000,000 and \$8,000,000		
Type of Insurance	Amount of Insurance	Provisions
1. Broad Form Commercial General Liability to include coverage for: a) Premises/Operations b) Products/Completed Operations c) Independent Contractors d) Personal Liability e) Contractual Liability	• \$2,000,000 each occurrence • \$4,000,000 general aggregate • \$4,000,000 Umbrella/ Excess Liability (follow-form)	City to be listed as additional insured and provided 30-day notice of cancellation or material change in coverage City to be provided a waiver of Subrogation
2. Business Auto Liability	• \$1,000,000 per occurrence • \$2,000,000 aggregate or; • \$2,000,000 combined single limits	City to be named as additional insured

3. Workers' Comp & Employers' Liability	• Statutory Limits • \$1,000,000 each accident	City to be provided a waiver of subrogation
4. Builders Risk Policy	• 100% of construction total	If Applicable
5. Other Coverages a) Professional Liability b) E & O coverage c) Cyber Liability	• To be determined by the City's Risk Manager on a per project basis	If Applicable

- 2.4.1 If vendor is performing service-related work on City fleet, Garage Keeper Liability is required at a limit of not less than \$1,000,000 per occurrence on a special form basis.
- 2.4.2 If contract has exposure for environmental hazards contact City's Risk Manager for specifications. (Including MCS-90).
- 2.4.3 Contracts for construction projects taking place in a high-risk flood zone area may require additional coverage requirements.
- 2.4.4 Insurance specifications for Contracts in excess of \$8,000,000 will be determined by the City's Risk Manager.
- 2.5 Commercial Automobile Liability. Company shall maintain business automobile liability insurance and, if necessary, commercial umbrella liability insurance with a limit of not less than \$1,000,000 per occurrence.
- 2.6 Such automobile liability insurance shall cover liability arising out of any auto (including owned, hired, and non-owned automobiles).
- 2.7 Commercial automobile coverage shall be written on ISO form CA 00 01, CA 00 05, CA 00 12, CA 00 20, or a substitute form providing equivalent liability coverage. If necessary, the policy shall be endorsed to provide contractual liability coverage equivalent to the amount provided in ISO form CA 00 01.
- 2.8 Company waives all rights against City and its agents, officers, directors and employees for recovery by the commercial automobile liability or commercial umbrella liability insurance obtained by Company pursuant to this section or under any applicable automobile physical damage coverage.
- 2.9 Workers' Compensation & Employer's Liability. Company shall maintain workers' compensation insurance with a limit of no less than \$1,000,000 each incident. The employers' liability limit and, if necessary, commercial umbrella coverage, shall not be less than \$1,000,000 each accident for bodily injury by accident or \$1,000,000 each employee for bodily injury by disease.
- 2.10 Company waives all rights against City and its agents, officers, directors and employees for recovery of damages under Company's workers' compensation and employers' liability in connection with scope of contract and completed operations.

3.0 EVIDENCE OF INSURANCE

- 3.1 Prior to commencement of work, and thereafter upon renewal or replacement of coverage required by this section, Company shall furnish City a certificate(s) of insurance, executed by a duly authorized representative of each insurer, showing compliance with this section. Company shall furnish copies of all endorsements as required by each section.
- 3.2 Failure of City to demand such certificate(s) or other evidence of full compliance with these insurance requirements or failure of City to identify a deficiency from evidence that is provided shall not be construed as a waiver of Company's obligation to maintain such insurance.
- 3.3 City shall have the right, but not the obligation, of prohibiting Company or any subcontractor from entering the project site until such certificates or other evidence that insurance has been placed in complete compliance with these requirements is received and approved by the City.
- 3.4 Failure to maintain required insurance may result in termination of this contract at sole option of the City.
- 3.5 **All Certificates of Insurance need to reference job or contract number in comments section.**
- 3.6 **Certificate Holder shall be listed as follows: City of Rowlett, 4000 Main St., Rowlett, TX 75088**



CITY OF ROWLETT
RFP 2025-166-B STRATEGIC PLANNING SERVICES
COMBINED EVALUATION MATRIX

Responding Firms	Experience & Qualifications (30%)	Project Approach & Methodology (25%)	Implementation, Monitoring & Reporting (20%)	Project Timeline (15%)	Cost (10%)	Total Score
Strategic Government Resources	24.00	20.83	13.67	12.25	10.00	80.75
The Mejorado Group	24.00	21.67	15.67	11.50	5.43	78.27
Baker Tilly	25.00	16.67	16.33	9.50	4.44	71.94
National Academy of Public Administration	23.00	18.33	13.33	11.00	2.87	68.53
Raftelis Financial Consultants Inc.	23.00	17.50	12.00	10.00	3.78	66.28
Berry Dunn McNeil & Parker LLC (dba Berry Dunn)	21.00	17.50	12.67	10.50	3.92	65.59
Future iQ Inc.	20.00	13.75	14.67	11.00	3.66	63.08
Kaizen - A Tetra Tech Company	20.00	14.17	11.33	13.00	3.33	61.83
Zilo International Group	20.00	17.50	12.00	10.50	7.50	67.50
Bmate Consulting Group LLC	17.50	15.83	11.33	11.00	2.17	57.84
Social Contract	12.00	14.17	12.33	11.00	5.23	54.73
MRB Group P.C.	17.00	13.75	11.33	9.50	1.22	52.81



July 29, 2025

City of Rowlett
Attn: Purchasing Manager
4000 Main Street
Rowlett, TX 75088

Dear Selection Committee,

Strategic Government Resources (SGR) is pleased to submit our proposal in response to RFP No. 2025-166-B to provide strategic planning services for the City of Rowlett. With over 23 years of experience supporting local governments, SGR brings a strong commitment to service, a deep understanding of municipal operations, a proven track record of facilitating inclusive strategic planning, and a passion for helping communities thrive.

We understand that the City of Rowlett is seeking a comprehensive, community-driven planning process that will produce a clear strategic framework aligned with your mission, vision, and values. SGR has helped dozens of municipalities across Texas and the U.S. create dynamic plans that are embraced by elected officials, city leadership, and residents alike. Our approach is rooted in meaningful engagement, data-informed decisions, and realistic implementation strategies.

We are confident that SGR's personalized, collaborative methodology and our extensive experience working with cities similar to Rowlett make us uniquely positioned to support your goals. We look forward to the opportunity to help the city create a strategic plan that inspires alignment, drives performance, and guides long-term success.

It has been our privilege to partner with the City of Rowlett in various capacities over the years, and we are truly honored by the opportunity to support you in this important strategic planning initiative. The City of Rowlett holds a special place for us, and we are fully committed to developing a plan that authentically reflects the values, vision, and aspirations of both your residents and staff.

Because this is such an important project to SGR, Dr. Mike Mowery, the President of Leadership Development, will serve as the primary facilitator and your main point of contact. He will work directly with you to finalize the agreement and ensure a seamless, high-impact engagement.

Respectfully submitted,

Mike Mowery

Mike Mowery, President of Leadership Development
Strategic Government Resources
MMowery@governmentresource.com

Consultant Information

Strategic Government Resources

PO Box 1642
Keller, TX 76244
Phone: 817-337-8581

Years in business: Over 23 with 19 full-time employees, 21 recruiters, 20 facilitators, and multiple consultants who function as subject matter experts on a variety of projects. SGR reaches a broad community of over 20,000 LinkedIn followers and over 40,000 subscribers to SGR's Servant Leadership e-newsletter that focuses on local government services, development, and innovation.

SGR Contact: Dr. Mike Mowery, President of Leadership Development will be the contact person authorized to submit the proposal and negotiate a contract on behalf of SGR.

Email: MMowery@governmentresource.com
Cell: 817-223-7320

Qualifications of Team Members

Lead Facilitator: Dr. Mike Mowery, President of Leadership Development- 14+ years of experience in strategic facilitation.

Project Collaborator: Emily Colon – Sr. Vice President of Leadership Development (Facilitator) – 14+ years of experience in local government.

SGR uses a group of highly qualified, professionally trained facilitators to conduct and collaborate on strategic planning and visioning retreats. These professionals specialize in leadership, strategy, communication, community engagement, and teambuilding. SGR has many years of experience conducting strategic visioning/planning retreats and has partnered with organizations like the City of Rowlett to provide services tailored to your organization's specific needs.

You will find Dr. Mowery and Emily's bios and resumes included in this proposal.

Facilitator

**Dr. Mike Mowery, President
Leadership Development**

MMowery@governmentresource.com

817-223-7320



Dr. Mike Mowery is the President of Leadership Development for Strategic Government Resources (SGR). He has been with SGR since 2011.

Mike has studied leadership for over 30 years and is experienced in guiding local governments in strategic visioning, building effective teams, and overcoming obstacles to improve and enhance organizational health. He has led over 500 Workshops on Leadership for local governments.

He is a graduate of Baylor University, Southwestern Baptist Theological Seminary, and Golden Gate Baptist Theological Seminary. His doctoral project focused on developing a process to help leaders create a strategic vision for a larger organization. This has become the foundation for SGR's approach to Strategic Planning which is being used by more and more City Councils.

Mike is the creator and presenter of SGR's Next Generation Leader training program and leads other workshops and classes including Building Better Leaders, Building the Great Workplace, and Overcoming the 5 Dysfunctions of a Team. Mike has helped develop and redefine SGR's Strategic Visioning Process used in city council retreats around the nation. He was also one of the developers for SGR's Mentoring Program, used to help emerging leaders reach their potential.

Mike has a passion for seeing leaders grow, excel, and provide outstanding leadership to their organizations. In addition to having earned several certifications in facilitation methods, he is in the process of a certified coach with the International Coaches Federation.



Dr. Mike Mowery

President of Leadership Development

(817) 223-7320

mmowery@governmentresource.com

Dr. Mike Mowery is the President of Servant Leadership Implementation for SGR. He has been with SGR since 2011 and has held several positions, including Chief Operating Officer for SGR. He has also been the Executive Pastor of Northwood Church in Keller, a multi-ethnic congregation with over 3,000 members and has served as the Senior Pastor of numerous churches throughout his career before joining SGR.

Mike has studied leadership for over 30 years and is experienced in guiding local governments in strategic visioning, building effective teams, and overcoming obstacles to improve and enhance organizational health. He has led over 500 Workshops on Leadership for local governments since 2011.

He is a graduate of Baylor University, Southwestern Baptist Theological Seminary, and Golden Gate Baptist Theological Seminary. His doctoral project focused on developing a process to help leaders create a strategic vision for a larger organization. This has become the foundation for SGR's approach to Strategic Planning which is being used by more and more City Councils.

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and Overcoming the 5 Dysfunctions of a Team. Mike has helped develop and redefine SGR's Strategic Visioning Process used in city council retreats. He was also one of the developers for SGR's Mentoring Program, used to help emerging leaders reach their potential.

Mike has a passion for seeing leaders grow, excel, and provide outstanding leadership to their organizations. A certified facilitator of I-OPT Survey, a validated tool for organizational engineering processes, Mike is also trained in facilitation methods by the Institute of Cultural Affairs (ICA), and he is a Certified Facilitator for the Implications Wheel Workshops.

PROFESSIONAL ACCOMPLISHMENTS

- Experienced in leading Council Retreats and facilitating Community Engagement Meetings
- Helped Develop and Refine SGR Strategic Visioning Process used in numerous City Council Retreats
- Certified Facilitator of I-OPT Survey, a validated tool for organizational engineering processes
- Trained in Facilitation Methods by The Institute of Cultural Affairs (ICA)
- Experienced Facilitator of "Overcoming the 5 Dysfunctions of a Team" Workshop
- Creator and Presenter of "Next Generation Leader" Training Material for City of Grapevine
- Experienced Facilitator of "Building Better Leaders" Executive Book Briefings
- Regular Presenter of SGR Leadership Classes
- Experienced Facilitator of "Building the Great Workplace," a workshop for management teams

- Certified Facilitator for the Implications Wheel Workshop
- Experienced Presenter at Leadership Conferences on “Overcoming the 5 Dysfunctions of a Team” Leadership Experience
- Founder and President of “Friends for Life Mentoring,” a non-profit organization that facilitates life-changing relationships between community leaders and young adults.
- Experienced in starting organizations from ground up through networking, referrals, personal relationships, and public presentations.
- Specialist in consultative approach through discovering needs, presenting solutions, and influencing individuals and groups toward a positive decision.
- Experience in leading churches of various sizes (from 50 to over 3,000) and in using leadership and management skills appropriate for the context.

LEADERSHIP DEVELOPMENT EXPERIENCE

- Managed staff of 10 direct reports, plus 20 additional indirect reports, enabling them to provide outstanding leadership and service.
- Successful track record in mentoring staff to become leaders with greater levels of responsibility.
- Developed and revised curriculum for SGR used in training leaders, building effective teams, and coaching and mentoring.
- Experienced in helping management teams through the process of overcoming obstacles, creating synergy, and developing health and effectiveness within their organizations.

- Experienced in providing one on one coaching to leaders in local government Teaching & Motivational Speaking.
- Developed material for small group learning activities.
- Extensive experience in research, writing and presenting training material used to develop leaders.
- Experienced at public speaking to large groups (1000+ attendees) and in leading small group activities.
- Has facilitated over 500 Leadership Workshops for local governments involving both employees and elected officials.

EDUCATION

- Doctor of Ministry, Golden Gate Baptist Theological Seminary, San Francisco, CA, 2000
- Masters, Southwestern Baptist Theological Seminary, Ft Worth, TX, 1990
- B.A., Baylor University, Waco, TX, 1985

Facilitator

**Emily Colon, Sr. Vice President; Leadership
Development Facilitator**

emilycolon@governmentresource.com

813-597-6957



Emily believes that leadership is a muscle. You're either strengthening it or letting it atrophy. Her core philosophy is simple: if you think you're staying the same, you're probably slipping without realizing it. She brings a sense of urgency, optimism, and clarity to every room she enters.

A seasoned local government leader and consultant, Emily is known for helping teams connect the dots between vision and execution. She blends strategic foresight with real-world practicality, ensuring that big ideas are backed by implementable plans. Whether guiding an organization through strategic planning, facilitating a leadership retreat, or advising on team dynamics, her gift lies in helping people see what's possible and giving them the tools and confidence to pursue it.

Emily is a straight shooter who values clear communication, collaborative problem-solving, and creating space for others to step into their best selves. She is energetic, thoughtful, and values building trust while moving the needle.

Born and raised in Minnesota, Emily traded snow for sunshine when she came to Florida on a college volleyball scholarship. She's married with three great kids who humble her daily and remind her why leadership rooted in service and growth matters so much.

EMILY COLÓN

emilyacolon@gmail.com



813.597.6957



Orlando, Florida



[linkedin.com/in/emily-colón](https://www.linkedin.com/in/emily-colón)



CERTIFICATIONS

Certified Public Manager (CPM),
Florida State University

Certified Labor Relations
Professional, Florida Public
Employer Labor Relations
Association (FPELRA)

Credentialed Manager (ICMA-CM),
International City/ County
Management Association

Florida Sterling Examiner,
Florida Sterling Council

Incident Command System (ICS),
Emergency Management Institute
100, 200, 700, & 800

Six Sigma Yellow Belt

EDUCATION

MASTER'S DEGREE
Public Administration
University of South Florida
Gubernatorial Fellow

BACHELOR'S DEGREE
International Business
University of South Florida
Sigma Delta Tau Vice President

ASSOCIATE'S DEGREE
Manatee Community College
NJCAA Division I Volleyball Captain

EXPERIENCE

THE SOUTHERN GROUP: Orlando, Florida

2025 – Present

The Southern Group is a premier government relations and consulting firm that helps clients navigate complexities and achieve results at all levels of government.

Partner

- Provide strategic consulting and government relations services primarily at the local government level to public and private sector clients throughout Florida.

CITY OF LAKELAND: Lakeland, Florida

2019 – 2025

The City of Lakeland is a dynamic municipality employing around 2,700 people and serving a population of approximately 122,000 citizens, which expands to 250,000 within its electric and water service areas. The City operates with a robust FY2025 budget of \$731 million in one of the nation's fastest growing cities.

Deputy City Manager

Assistant City Manager & Manager of Innovation and Strategy (dual roles)

Assistant City Manager

- Responsible for Executive Level management directly for the Departments/ Divisions of Community & Economic Development, Emergency Management, Fire, Human Resources, Information Security, Information Technology, Internal Audit, Office of Innovation & Strategy, Office of Management & Budget, Lakeland Linder International Airport, Public Works (to include Construction and Maintenance, Engineering, Facilities, Fleet, Lakes & Stormwater, Solid Waste, and Traffic Operations), Retirement Services, Risk Management (to include Purchasing & Warehouse), RP Funding Center (Civic Center), and Water Utilities.
- Lead the City's Strategic Planning Process with the Mayor and City Commission. This process has been completely transformed during my tenure.
- Represent the City at various public events and speaking engagements regularly; serve as Acting City Manager, as needed, including on the Mayor's Council on the Arts and as the Title VI Coordinator.
- Created and chaired a COVID-19 Response Committee for the organization. Practices and policies were created and implemented including remote work, technology usage, floating holidays (for vaccination), and sick leave.

PASCO COUNTY: New Port Richey, Florida

2014 – 2019

Pasco County employed approximately 2,700 staff members and served around 484,000 unincorporated residents. With a Fiscal Year 2019 budget of \$1.3 billion, the County provided a wide range of services to meet the needs of its growing population.

Program Administrator, Internal Service Departments

- Assisted the Assistant County Administrator in the planning, organizing and direction of all activities in the Branch with an emphasis on program administration; departments to include Facilities Management (and Real Estate), Fiscal Services, Fleet Management, Human Resources, Information Technology (and GIS), Office of Management and Budget, and Purchasing.
- Administered the implementation of plans and proposals approved by the Board during the Budget and Business Planning Cycle to include complex multi-department and multi-branch actions.
- Managed the plan of action for a General Obligation (G.O.) Bond (\$241 million) consisting of 4 different referendums to include: Public Safety (Sheriff's Office and Fire Rescue), Parks, Recreation, and Natural Resources, and Library projects. Served as the sole Expert Witness in Bond Validation.

EMILY COLÓN

PROFESSIONAL AFFILIATIONS

American Society of Public Administration (ASPA)
Suncoast Chapter Immediate Past President

Engaging Local Government Leaders (ELGL)

Florida City/ County Management Association (FCCMA)
Ethics Committee Member
Membership Committee Member

Florida Women Leading Government (FWLG)
Programming Chair and Founding Member

Florida Public Employer Labor Relations Association (FPELRA)

International City/ County Management Association (ICMA)
ACAO Committee Member
Conference Education Committee
SheLeadsGov Committee Member
Coach for ICMA Connect

Society for Human Resources Management (SHRM)

EXTRA

ADJUNCT PROFESSOR
University of South Florida,
College of Public Affairs

LEADERSHIP FLORIDA,
Connect Class XI

PARENT VOLUNTEER,
Heathrow Elementary

EXPERIENCE continued

Purchasing Director (Interim), Purchasing Department

- Updated the County's Surplus Policy and got caught up with the three-year backlog of surplus items.
- Led the Audit Response to the Inspector General's Office, which resulted in the decrease of audit comments from 26 to 16 (with 3 observations).

Budget Manager, Office of Management & Budget

- Assisted in union negotiations (IAFF), contract management, and program coordination with various Department Heads.
- Liaison for all Constitutional Offices, Judicial and other outside community partners with the Office of Management and Budget.

Administrative Services Manager (Interim), Fleet Management

- Performed monthly billing functions; typically, between \$800,000-\$1,300,000.
- Constructed and filed the monthly Fuel Tax Refunds to the Department of Revenue.

Budget Analyst II, Office of Management & Budget

- Analyzed budget proposals, financial reports, and expenditures, developed recommendations for budget allowances.
- Compiled documentation for annual audit support, filed Quarterly Courts Report through the State along with the annual Article V Report, and calculated the variable medical examiner rate and managed the process.

STATE OF FLORIDA

2011 - 2014

RECENT THOUGHT LEADERSHIP

- Contributing Author, "[Your Tone is Showing: How We Build Community Without Saying a Word](#)," ELGL Morning Buzz, July 2025
- Panelist, "AI in Your Toolbox: Boosting Efficiency for Local Government Leaders," FCCMA Annual Conference, May 2025
- Co-Presenter, "Mastering Personal Strategic Planning: A Blueprint for Career Development," FCCMA Annual Conference, May 2025
- Moderator, "So You Are Going to Be a City/ County Manager," FCCMA Pre-Conference, May 2025
- Contributing Author, "[ASSISTANTS AND DEPUTIES: Managing Those with Greater Technical Expertise](#)," PM Magazine, March 2025
- Contributing Author, "[Nonpartisan Leadership in a Polarized Era: A Local Government Survival Guide](#)," ELGL Morning Buzz, February 2025
- Speaker, "Empowering Growth," Florida Women Leading Government Webinar, February 2025
- Contributing Author, "[WOMEN IN LEADERSHIP: Humor as a Leadership Skill](#)," PM Magazine, February 2025
- Contributing Author, "[ASSISTANTS AND DEPUTIES: Keeping the Momentum](#)," PM Magazine, November 2024
- Panelist, "Art of Assistant Leadership: You're Not Alone in the Crazy; Navigating Silly Season as an ACAO," ICMA Annual Conference, September 2025
- Featured Expert, "[CommuniTIES: Retention & Recruitment Trends in the Public Sector](#)," Podcast, July 2024

Project Approach & Methodology

SGR's strategic planning process includes the following components:

- 1. Discovery and Data Gathering**
 - Review existing documents, reports, and performance data
 - Facilitate stakeholder interviews and focus groups
 - Conduct a community-wide survey
- 2. Facilitation of Planning Workshops**
 - Inclusive sessions with City Council, leadership, and staff
 - Focus on identifying priorities, challenges, and values
- 3. Strategic Framework Development**
 - Draft and refine Vision, Mission, and Core Values
 - Identify Strategic Priorities and Goals
 - Develop measurable Objectives and KPIs
- 4. Community Engagement & Communications**
 - Create accessible public materials
 - Launch a communications plan to promote awareness and feedback
- 5. Final Strategic Plan**
 - Produce a clear, visual plan document
 - Present findings and facilitate adoption meeting

Below is a description of the process we normally follow in order to accomplish these goals. We customize each event, so we will collaborate with you to tailor the process to fit your needs and your budget. This is presented as a starting point for dialogue with the City of Rowlett.

The SGR Approach

1. Kick-off

This will be an in-person meeting or conference call with the City Manager and others they want to include. The goal will be to clarify expectations, desired outcomes, key responsibilities, logistical plans, a tentative timeline, and overview of the process.

2. Community Engagement Events and Focus Group Events

We believe the best way to create community engagement is to have a series of two or more Community Engagement Events and Focus Group Events that are facilitated by SGR. Community Engagement Events are targeted to the community at large. Focus Group Events are targeted to specific groups, such as Senior Adults, Educators, Business Owners, etc.

While we can adapt to the city's unique situation below is a description of the way we have facilitated community engagement and focus group events with the most success.

We believe the best way to do this is for the city to create a community engagement steering committee. This committee should be made up of a cross section of stakeholders in the city. While one or two council members should be on the committee as well as a representative from the city manager's office, the committee should not be made up primarily of city officials or employees. Instead, this committee needs to consist of community business leaders, educational partners, and other stakeholders and volunteers from a broad background.

The steering committee's responsibility is to develop and promote community engagement and focus group events. It must be made clear that their responsibility is not to create the strategic plan. The strategic vision and the strategic plan will be developed by the council and the senior staff. We want the committee to help boost attendance and participation in these engagement events.

During the community engagement events, we group people into small groups and let them answer some of the strategic questions that the city needs to address. We let each group report on the essence of their discussion, and each time we present new questions, we reform the groups.

3. Focus Groups

The steering committee will determine the types of focus group meetings that should be held. In light of the City Council Elections being held in November, one option might be to have at least one Focus Group Event for representatives and candidates of other governing bodies that have a stake in the city's strategic plan. This would include school boards, county commissioners, utility districts, as well as candidates for city council positions. While it would be a meeting that is open to the public, the intent would be to hear from this particular group of stakeholders.

Pre-Retreat

SGR will conduct advance onsite, or telephone interviews with each council member, and will send questionnaires to department directors. We will create a summary report of the results of the interviews and questionnaires while maintaining anonymity.

Day of Retreat

- SGR will facilitate the retreat in alignment with the agenda and desired outcomes for the next five years.

- SGR retreats are interactive and designed to inspire a high level of participation and discussion. We do this by presenting strategic questions for the Council to discuss in small groups or pairs and then ask the group to report on the main things that they discussed.
- SGR will lead the Council to develop a set of cohesive strategic priorities and milestones.
- Department Directors will be involved throughout the process, which will include participation in the retreat.

Typical Agenda

Below are some of the typical steps we lead the Council through in order to help them develop their strategic vision. We will collaborate with you to develop the exact agenda, but these are some of the key elements we believe are important to help you create your strategic vision.

- Discussion of Community Input from Community Engagement Events and Focus Group Meetings.
- Discussion of Staff Input
- Discussion of the Council's Reputational Drivers
- Discussion of SWOT Analysis
- Imagining what Success Looks Like
- Identifying Strategic Priorities
- Developing Milestones for each Strategic Priority

Post Retreat

SGR will develop a Retreat Report that captures the key elements discussed and the strategic priorities and milestones that the Council develops. A rough draft of the report will be sent to the city within 10 days after the retreat. Once edits have been made SGR will create a report that presents the city's Strategic Priorities, Milestones, and Goals in a way that will support the city's desired brand to residents and stakeholders. Our goal is to demonstrate transparency and professionalism so that the public will have confidence in the integrity of the process and a sense of ownership in the desired outcomes of the strategic plan.

Facilitators:

Dr. Mike Mowery, President of Leadership Development and Emily Colon, Sr. Vice President; Leadership Development Facilitator.

Implementation, Monitoring and Reporting

Our approach emphasizes sustainability and accountability: Development of an Implementation Matrix with responsible parties, timelines, and resources. Dashboard templates for internal monitoring and public transparency. Training for staff on performance measurement tools, and optional quarterly or annual plan review and refresh sessions.

Project Timeline

Phase	Activity	Timeline
1.	Discovery & Engagement	Aug 2025 - Sep 2025
2.	Strategic Planning Workshops	Sep 2025 - Oct 2025
3.	Draft Plan Development	Oct 2025 - Nov 2025
4.	Finalization & Adoption	Nov 2025 - Dec 1, 2025

SGR is fully committed to meeting the City's required completion date of December 1, 2025.

References

City of Frisco, TX

Wes Pierson, City Manager

WPierson@friscotexas.gov

972-292-5105

City of Gladstone, Missouri

Bob Baer, City Manager

bobb@gladstone.mo.us

816-436-2200

City of Olathe, Kansas

Nolan Sunderman, Chief Strategy Officer

nsunderman@olatheks.org

913-971-8637

City of Lake Wales, Florida

James Slaton, City Manager

JSlaton@lakewalesfl.gov

863-678-4182

Town of Little Elm, Texas

Caitlan Biggs, Director of Administrative Services

cbiggs@littleelm.org

214-975-0452

SGR's Strategic Planning & Visioning Experience, 2021-Present

City-County Communications & Marketing Association (3CMA)

- Strategic Planning Project, 2023

City of Pelham, Alabama

- Strategic Visioning Retreat, 2023

City of Lodi, California

- Strategic Visioning & Planning Retreat, 2023

City of Milpitas, California

- Strategic Planning Retreat, 2023

City of Tracy, California

- Strategic Priorities & Goal Setting Retreat, 2023

City of Eaton, Colorado

- Strategic Visioning Retreat, 2022

Florida Governmental Utility Authority (FGUA)

- Strategic Planning Session, 2024
- Strategic Planning Session, 2025

City of Boca Raton, Florida

- Strategic Visioning Retreat, 2021

City of Cape Canaveral, Florida

- Strategic Planning Retreat, 2022
- Strategic Planning Retreat, 2023

City of Lake Wales, Florida

- Strategic Visioning Retreat, 2022

Pinellas County, Florida

- Strategic Visioning/Planning Retreat, 2024
- Strategic Visioning/Planning Follow-up Workshop, 2024
- Strategic Wrap-up Session, 2024

Village of Oak Park, Illinois

- Strategic Visioning Retreats, 2023

City of Gladstone, Missouri

- Strategic Visioning Retreat, 2021
- Strategic Visioning Retreat, 2022
- Strategic Visioning Retreat, 2023

City of Kansas City, Missouri

- Strategic Goal Setting & Governance Retreat, 2023

City of St. Charles, Missouri

- Strategic Visioning & Team Building Retreat, 2024

City of Parkville, Missouri

- Strategic Planning Retreat-Staff, 2022
- Strategic Planning Retreat-Council, 2022
- Strategic Planning Process, 2023
- Strategic Planning Council Retreat, 2024
- Annual Strategic Planning Council Retreat, 2025

City of La Vista, Nebraska

- Council Strategic Visioning Retreat, 2024

City of Shawnee, Oklahoma

- Strategic Visioning Retreat, 2023

City of Sherwood, Oregon

- Strategic Planning & Goal Setting Retreat, 2022
- Strategic Planning & Goal Setting Retreat, 2023

Texas Commission on Law Enforcement (TCOLE)

- Strategic Planning Retreat, 2024

City of Addison, Texas

- Strategic Visioning Retreat, 2021
- Strategic Visioning Retreat, 2022

City of Allen, Texas

- Strategic Visioning Retreat, 2021
- Strategic Planning Team Retreat, 2023

City of Celina, Texas

- Strategic Visioning Retreat, 2022

City of Cleburne, Texas

- Council Strategic Planning Retreat, 2024

City of Commerce, Texas

- Strategic Visioning Retreat, 2023

Dallas County, Texas

- Strategic Planning Workshops, 2021
- Strategic Planning Workshop, Planning & Development, 2022
- Strategic Planning Workshop, Facilities Management, 2022
- Strategic Planning Workshop, County Marshals, 2022

City of Dallas Environmental Commission, Texas

- Strategic Planning Retreat, 2022

City of Dayton, Texas

- Strategic Visioning Retreat, 2021

City of Denton, Texas

- Council Retreat Governance & Strategic Priorities, 2024

City of Farmers Branch, Texas

- Council Strategic Planning Retreat, 2024

City of Fate, Texas

- Strategic Visioning Retreat, 2022
- Strategic Visioning Follow-up, 2023
- Strategic Visioning Retreat, 2025

City of Fort Worth, Texas

- Strategic Visioning Retreat, 2023
- Council Strategic Visioning Retreat, 2024

City of Fort Worth, TX - Police Department

- Strategic Planning Sessions, 2022

City of Harlingen, Texas

- Strategic Visioning Retreat, 2021
- Strategic Planning Workshop, 2021

Harris County Flood Control District

- Strategic Planning Small Group Workshops, 2024

City of Leander, Texas

- Strategic Planning Session with Council & Staff, 2024

Town of Little Elm, Texas

- Strategic Planning Retreat, 2021
- Strategic Planning Retreat, 2022
- Strategic Planning Retreat, 2023
- Joint Strategic Planning Retreats (Council, Boards, & Commission Members), 2023
- Strategic Planning Council Retreat, 2023

Town of Little Elm, Texas - Police Department

- Strategic Planning Process, 2024

McKinney Economic Development Corporation

- Strategic Visioning Session, 2024

City of McKinney, Texas

- Annual Strategic Visioning Workshop, 2024
- Strategic Visioning Retreat, 2025

City of Pearland, Texas

- Strategic Visioning Review Retreat, 2022

City of Miami Beach, Florida

- Strategic Visioning & Planning Retreat, 2025

City of Creve Coeur, Missouri

- Strategic Planning with City Council & Staff, 2025

City of Bedford, Texas

- City Council Strategic Planning Retreat, 2025

City of Plainview, Texas

- Strategic Planning & Budget Prioritization Workshop, 2023
- Strategic Planning Council Retreat, 2025

City of Portland, Texas

- Strategic Visioning Retreat, 2022
- Strategic Planning Retreat, 2023

Town of Sunnyvale, Texas

- Strategic Planning Staff Retreat, 2023
- Strategic Planning Council Retreat, 2023
- Town Council Strategic Planning Retreat, 2024

Tarrant County College District, Texas

- Strategic Planning Workshop, 2021

City of Vernon, Texas

- Strategic Planning Retreat, 2021

City of Waco, Texas

- Strategic Visioning Retreat, 2021
- Governance Retreat, 2024

City of Manassas, Virginia

- Strategic Planning Retreat, 2023

City of Ellensburg, Washington

- Strategic Visioning Retreat, 2021

City of Ormond Beach, Florida

- Strategic Planning/Goal Setting Prioritization Workshop, 2025

City of Bridgeport, Texas

- Strategic Planning & Team Building Retreat, 2025

City of Elgin, Texas

- Strategic Planning Council Retreat, 2025

St. Lucie County, Florida

- Strategic Visioning Retreat, 2025

City of Frisco, Texas

- Facilitated annual Strategic Planning Retreats every year since 2011

City of Plano, Texas

- Council Retreat, 2025

The Woodlands Township, Texas

- Strategic Planning Workshop, 2025

City of Aspen, Colorado

- Strategic Planning Retreat, 2024
- Strategic Planning Retreat, 2025

Town of Firestone, Colorado

- Strategic Planning Retreat, 2023

City of Belton, Missouri

- Strategic Planning Retreat, 2022

City of Belton, Texas

- Strategic Planning Retreat, 2025

City of Temple, Texas

- Governance Retreat, 2023

City of Shawnee, Kansas

- Strategic Planning Retreat, 2025

City of Bloomington, Illinois

- Strategic Planning Update Retreat, 2024

City of Macon, Missouri

- Strategic Planning Retreat, 2025

Washington County, Texas

- Strategic Planning Services, 2025

City of Granite Shoals, Texas

- Council Retreat, 2025

City of Seabrook, Texas

- Council Retreat, 2025

City of Decatur, Illinois

- Strategic Visioning/Goal Setting Council Retreat, 2025

City of Venus, Texas

- Strategic Plan Process, 2025

Town of Flower Mound, Texas

- Council Retreat (Strategic Planning), 2025

Fee Schedule

Phase	Description	Cost
Phase 1	Discovery, Surveys, and Interviews	\$4,000
Phase 2	Community Engagement Events, Focus Groups, Workshops, and Facilitation	\$20,000
Phase 3	Draft Plan Development and Final Report	\$3,500
Phase 4	Finalization & Adoption	\$2,500
Estimated Total for Services		\$30,000

Travel expenses included for up to two SGR Facilitators. Additional workshops for support may be added upon request.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

06/18/2025

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 rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Trutela Insurance, LLC 8200 Windway Dr Windcrest, TX 78239	CONTACT NAME: Jamie Intriago PHONE (A/C, No. Ext): 210-757-4520 E-MAIL ADDRESS: jamie.intriago@trutela.com FAX (A/C, No): INSURER(S) AFFORDING COVERAGE INSURER A: Chubb Group INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:	NAIC # 10052
INSURED STRATEGIC GOVERNMENT RESOURCES, INC P.O. BOX 1642 KELLER, TX 76244		

COVERAGES**CERTIFICATE NUMBER: 00103581-0****REVISION NUMBER: 7**

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 INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☐ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☐ POLICY ☐ PRO-JECT ☐ LOC OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	AUTOMOBILE LIABILITY ☐ ANY AUTO ☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS ☐ HIRED AUTOS ONLY ☐ NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB ☐ OCCUR EXCESS LIAB ☐ CLAIMS-MADE DED ☐ RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y / N N	N / A	Y 71840063	04/30/2025	04/30/2026	X PER STATUTE ☐ OTH-ER ☐ E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

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

CERTIFICATE HOLDER**CANCELLATION**

Strategic Government Resources, Inc., DBA SGR 6502 Glen Abbey Abilene, TX 79606	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  (JAI)
--	--

WAIVER OF OUR RIGHT TO RECOVER FROM OTHERS ENDORSEMENT

We have the right to recover our payments from anyone liable for an injury covered by this policy. We will not enforce our right against the person or organization named in the Schedule. (This agreement applies only to the extent that you perform work under a written contract that requires you to obtain this agreement from us.)

This agreement shall not operate directly or indirectly to benefit anyone not named in the Schedule.

Schedule

Any person or organization against whom you have agreed to waive your right of recovery in a written contract, provided such contract was executed prior to the date of loss.

For policies or exposure in Missouri:

Any person or organization for which the employer has agreed by written contract, executed prior to loss, may execute a waiver of subrogation. However, for purposes of work performed by the employer in Missouri, this waiver of subrogation does not apply to any construction group of classifications as designated by the waiver of right to recover from others (subrogation) rule in our manual.

This endorsement changes the policy to which it is attached and is effective on the date issued unless otherwise stated.
(The information below is required only when this endorsement is issued subsequent to preparation of the policy.)

Endorsement Effective **05-06-25** Policy No. **71840063**
Insured **STRATEGIC GOVERNMENT RESOURCES, INC.**
Insurance Company **Federal Insurance Company**

Endorsement No. **002**
Premium \$ **Incl.**

Countersigned By _____

CALIFORNIA WAIVER OF OUR RIGHT TO RECOVER FROM OTHERS ENDORSEMENT

This endorsement applies only to the insurance provided by the policy because California is shown in Item 3.A. of the Information Page.

We have the right to recover our payments from anyone liable for an injury covered by this policy. We will not enforce our right against the person or organization named in the Schedule, but this waiver applies only with respect to bodily injury arising out of the operations described in the Schedule, where you are required by a written contract to obtain this waiver from us.

You must maintain payroll records accurately segregating the remuneration of your employees while engaged in the work described in the Schedule.

Schedule

1. ☐ Specific Waiver

Name of person or organization

☐ Blanket Waiver

Any person or organization for whom the Named Insured has agreed by written contract to furnish this waiver.

2. Operations:

3. Premium:

The premium charge for this endorsement shall be 1% percent of the California premium developed on payroll in connection with work performed for the above person(s) or organization(s) arising out of the operations described.

4. Minimum Premium:

Authorized Representative

This endorsement changes the policy to which it is attached and is effective on the date issued unless otherwise stated.
(The information below is required only when this endorsement is issued subsequent to preparation of the policy.)

Endorsement Effective **05-06-25** Policy No. **71840063**

Endorsement No. **002**

Insured **STRATEGIC GOVERNMENT RESOURCES, INC.**

Premium \$ **Incl.**

Insurance Company **Federal Insurance Company**

Countersigned By _____



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
06/20/2025

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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 rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Mary Storti c/o Paychex Insurance Agency, Inc. 225 Kenneth Drive, Rochester, NY 14623	CONTACT NAME: PHONE (A/C, No, Ext): (888) 627-4735 FAX (A/C, No): E-MAIL ADDRESS: PEO_WorkComp@paychex.com																					
INSURED Paychex PEO Holdings, LLC 911 Panorama Trail South Rochester NY 14625	<table><tr><th colspan="2">INSURER(S) AFFORDING COVERAGE</th><th>NAIC #</th></tr><tr><td>INSURER A:</td><td>American Zurich Insurance Company</td><td>40142</td></tr><tr><td>INSURER B:</td><td></td><td></td></tr><tr><td>INSURER C:</td><td></td><td></td></tr><tr><td>INSURER D:</td><td></td><td></td></tr><tr><td>INSURER E:</td><td></td><td></td></tr><tr><td>INSURER F:</td><td></td><td></td></tr></table>	INSURER(S) AFFORDING COVERAGE		NAIC #	INSURER A:	American Zurich Insurance Company	40142	INSURER B:			INSURER C:			INSURER D:			INSURER E:			INSURER F:		
INSURER(S) AFFORDING COVERAGE		NAIC #																				
INSURER A:	American Zurich Insurance Company	40142																				
INSURER B:																						
INSURER C:																						
INSURER D:																						
INSURER E:																						
INSURER F:																						

COVERAGES

CERTIFICATE NUMBER: 20315595

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 INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☐ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☐ POLICY ☐ PRO-JECT ☐ LOC ☐ OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	AUTOMOBILE LIABILITY ☐ ANY AUTO ☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS ☐ HIRED AUTOS ONLY ☐ NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB ☐ OCCUR EXCESS LIAB ☐ CLAIMS-MADE DED ☐ RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below Y/N ☐ N ☒ N/A			WC 12-68-329-05	06/01/2025	06/01/2026	☒ PER STATUTE ☐ OTH-ER E.L. EACH ACCIDENT \$ 2,000,000 E.L. DISEASE - EA EMPLOYEE \$ 2,000,000 E.L. DISEASE - POLICY LIMIT \$ 2,000,000
				Location Coverage Period:	06/01/2025	06/01/2026	Client# 70164189-TX

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

Coverage is provided for only those co-employees of, but not subcontractors to: Alt. Emp: STRATEGIC GOVERNMENT RESOURCES INC, 126 Angie Ln, Abilene TX 79602

CERTIFICATE HOLDER

CANCELLATION

STRATEGIC GOVERNMENT RESOURCES INC 126 Angie Ln Abilene TX 79602	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
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ACORD 25 (2016/03)

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CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

04/30/2025

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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 rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Coverica, Inc. 5999 Summerside Suite 200 Dallas TX 75252	CONTACT NAME: Daisy Saldana PHONE (A/C, No, Ext): (972) 490-8800 E-MAIL ADDRESS: daisy.saldana@coverica.com FAX (A/C, No): (469) 960-2095
INSURED Strategic Government Resources, INC. 6502 Glen Abbey Lane Abilene TX 79606	INSURER(S) AFFORDING COVERAGE INSURER A: Aspen Specialty Insurance Co INSURER B: Progressive Insurance Company INSURER C: R-T Specialty, LLC INSURER D: INSURER E: INSURER F:
	NAIC # 24260

COVERAGES**CERTIFICATE NUMBER:** 25-26 COI**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 INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☒ POLICY ☐ PRO-JECT ☐ LOC OTHER:			CPL-SUE7AAU-P0325	03/22/2025	03/22/2026	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
B	AUTOMOBILE LIABILITY ☐ ANY AUTO ☐ OWNED AUTOS ONLY ☒ HIRED AUTOS ONLY ☐ SCHEDULED AUTOS ☒ NON-OWNED AUTOS ONLY			992742355	03/22/2025	03/22/2026	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ Uninsured motorist \$ 1,000,000
C	☒ UMBRELLA LIAB ☒ EXCESS LIAB DED RETENTION \$ ☐ CLAIMS-MADE			AN1342864	03/22/2025	02/22/2026	COMBINED SINGLE LIMIT EACH OCCURRENCE \$ 2,000,000 AGGREGATE \$ 2,000,000
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y / N ☐	N / A				PER STATUTE OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Professional Liability			CPL-SUE7AAU-P0325	03/22/2025	03/22/2026	General Aggregate \$3,000,000 Each Occurrence \$1,000,000

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

The General Liability, Professional liability, Auto policy includes a blanket automatic additional insured endorsement that provides additional insured status to the certificate holder only when there is a written contract/written agreement between the named insured and the certificate holder that requires such status. The General Liability, Auto policy includes a blanket automatic waiver of subrogation endorsement that provides this feature only when there is a written contract between the named insured and the certificate holder. The General Liability policy includes an endorsement providing that 30 day+ notice of cancellation [or coverage change] will be furnished to the certificate holder. Notice is sent to certificate holders with mailing addresses on file with the agent or the company. The endorsement does not provide for notice of cancellation to the certificate holder if the named insured requests cancellation. The General Liability and Auto policy contains a special endorsement with "Primary and Noncontributory" wording. Umbrella policy follows forms.

CERTIFICATE HOLDER**CANCELLATION**

Strategic Government Resources, INC. 6502 Glen Abbey Lane Abilene TX 79606	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
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AGENCY CUSTOMER ID: _____

LOC #: _____

ADDITIONAL REMARKS SCHEDULE

Page ____ of ____

AGENCY Coverica, Inc.		NAMED INSURED Strategic Government Resources, INC.
POLICY NUMBER		
CARRIER	NAIC CODE	EFFECTIVE DATE:

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,	
FORM NUMBER: 25	FORM TITLE: Certificate of Liability Insurance: Notes
Directors & Officers./Crime Policy # 82625020 Carrier: Federal Insurance Company Effective Dates 12/16/2024-12/16/2025 Limits: \$1,000,000 Aggregate Cyber Liability, Policy #D95977911 Carrier: ACE American Insurance Company Effective Dates: 3/22/2025-3/22/2026 Limits: \$1,000,000 Occurrence/\$1,000,000 Aggregate Deductible: \$2,500	



AGENCY CUSTOMER ID: _____

LOC #: _____

ADDITIONAL REMARKS SCHEDULE

Page ____ of ____

AGENCY Coverica, Inc.		NAMED INSURED Strategic Government Resources, INC.
POLICY NUMBER		
CARRIER	NAIC CODE	EFFECTIVE DATE:

ADDITIONAL REMARKS**THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,****FORM NUMBER:** 25 **FORM TITLE:** Certificate of Liability Insurance: Remarks

General Liability and Auto policy contains a special endorsement with "Primary and Noncontributory" wording. Umbrella policy follows forms.

Additional Information

- **Exceptions to Terms:** None.

RFP 2025-166-B
STRATEGIC PLANNING SERVICES
PROPOSAL CERTIFICATION FORM

By submitting a proposal, the Consultant certifies that the Standard Terms and Conditions for Procurements, the RFP requirements, and all issued Addendums have been read and are fully understood, and it's the Consultant's intent to enter into negotiations for a contract for Strategic Planning Services. Consultant agrees to abide by the terms and statutory requirements governing the solicitation process.

All addenda shall be issued in written form by the Purchasing Office. The City is not bound by any oral representations, clarifications, or changes made in connection to the RFP by the City's employees, agents or consultants unless in the form of a properly issued Addendum.

The failure of the Consultant to contact the Owner to determine the issuance of any Addenda, or to acknowledge receipt of any and all of the Addenda issued in connection with this project, shall entitle the City, at its sole discretion, to (i) reject the proposal of the Consultant as being non-responsive, or (ii) to accept the proposal of the Consultant, in which event the Consultant agrees to be bound by all of the terms and conditions of each unacknowledged Addendum.

A. FIRM INFORMATION

Legal Name of Vendor: SGR (Strategic Government Resources)

Tax ID Number: 46-0501585 Telephone No: 817-337-8581

State of Formation: Texas Year of Formation: 2002

Address: PO Box 1642 Keller, TX 76244

Contact Name and Title: Dr. Mike Mowery

Contact Phone No: 817-223-7320

Contact Email Address: mmowery@governmentresource.com

B. CERTIFICATION

I certify that I have the legal authority to bind the Consultant listed above, and I further certify that there are no objections to any of the terms and conditions listed in this RFP document, except as noted in Article VIII. Submittals, Section I. Additional Information, Item 2. (if applicable).

Signature of Authorized Representative: Mike Mowery

Printed Name and Title of Authorized Representative: Mike Mowery

Date of Certification: Jul 29 2025 12:37 CST

July 31, 2025

City of Rowlett

RFP No. 2025-166-B

Proposal for strategic planning services

SECTION A

The information provided here is of a general nature and is not intended to address the specific circumstances of any individual or entity. In specific circumstances, the services of a professional should be sought. © 2025 Baker Tilly Advisory Group, LP.

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January Calhoun, Purchasing Manager
City of Rowlett
Delivered electronically

Baker Tilly Advisory Group, LP
12221 Merit Drive
Suite 1200
Dallas, TX 75251
T: +1 (469) 206 4210
bakertilly.com

Dear Ms. Calhoun:

The City of Rowlett (the City) has been intentional about strategic planning and assessing progress toward its goal of remaining a desirable community for its residents and local businesses. This in mind, the City is now ready to plan for the next few years with a comprehensive strategic plan to guide decision-making and the responsible use of resources. Baker Tilly recently completed the Rockwall County Strategic Plan 2050 engagement, and are well positioned to bring this expertise, research and process to the City of Rowlett.

Many organizations, including local governments, develop strategic plans as a standard practice of good governance—yet 60 to 90 percent of these plans never fully launch. In our experience, this often results from a combination of factors: setting unrealistic or overly numerous goals, underestimating the time and resources required, relying on insufficient data and analysis, lacking clarity around roles and responsibilities, and facing limited leadership support or staff buy-in. Additionally, when a strategy isn't fully aligned with an organization's core vision, mission and values, it struggles to gain traction or deliver meaningful outcomes.

Without a clear and effective roadmap to drive strategy, your community misses out on essential improvements in programming and services. This not only impacts the ability to improve quality of life within the community but can also lead to a loss of trust with those you serve.

Baker Tilly's expertise in strategic planning and goal-setting for local governments makes us well-qualified to help guide the City from plan construction to plan implementation. Our strategic planning methodology serves as a reliable and repeatable approach to the completion of strategic planning and goal setting.

Our proposed team members for this engagement have helped cities, counties, special districts and other public-sector agencies identify goals and priorities along with ways to implement them. We have facilitated one-day priority-setting workshops, complex strategic planning projects with community engagement and corresponding departmental work plans, and everything in between.

We commend the City of Rowlett for initiating this important project and recognize the strategic foresight it represents. As the Dallas–Fort Worth metroplex continues its rapid growth—extending northward toward Prosper and eastward from U.S. 380 to I-20—Rowlett is uniquely positioned to navigate both exciting opportunities and complex challenges. Your City sits at a critical intersection of regional expansion, making thoughtful and purposeful planning more important than ever.

The ideas and approach shared in our proposal show how important Rowlett will be to us as a client. We can't wait to get started.

We can't wait to get started.

Sincerely,

A handwritten signature in dark ink, appearing to read "Caitlin Humrickhouse".

Caitlin Humrickhouse, MPA, SWP, Principal
+1 (312) 729 8098 | caitlin.humrickhouse@bakertilly.com

July 31, 2025

City of Rowlett

RFP No. 2025-166-B

Proposal for strategic planning services

SECTION B

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Consultant information

Baker Tilly Advisory Group, LP and contact information

BAKER TILLY	AUTHORIZED SIGNER
12221 Merit Dr Suite 1200 Dallas, TX 75251 +1 (469) 206 4210	Caitlin Humrickhouse Principal +1 (312) 729 8098 caitlin.humrickhouse@bakertilly.com

Addenda

This is confirmation that we received Communication No. 1 on July 16 and Communication No. 2 on July 28.

Building on our past

Our journey since we opened in 1931 has been one of strategic growth. Today, Baker Tilly Advisory Group, LP is an advisory and accounting firm that provides consulting and tax services to its clients. The firm originated in 1931 as Edward A. Virchow, CPA and operated under that name until forming a partnership in 1953, which created Virchow, Krause & Company. More than 50 different combinations occurred over the years.

In 2009, our firm registered as Baker Tilly Virchow Krause, LLP with headquarters in Chicago when we became the exclusive branded U.S. member firm of Baker Tilly International. In 2020, we changed our legal name to Baker Tilly US, LLP.

In 2024, Baker Tilly US, LLP accepted a strategic investment from private equity firms Hellman & Friedman and Valeas Capital Partners. As part of that strategic investment, in June 2024, the firm was restructured into two entities which operate under an alternative practice structure: Baker Tilly Advisory Group, LP provides the firm's business advisory, tax and other services and is not a licensed CPA firm; and Baker Tilly US, LLP, a licensed CPA firm, that provides the firm's attest services. The alternative practice structure was formed to ensure compliance with regulatory and independence requirements governing accounting firms.

Delivering specialized expertise to our public sector clients

State and local government is a complex, unique environment shaped by fiscal, regulatory and operational considerations not found in other sectors. Recognizing this complexity and eager to serve as a true valued advisor to the public sector, Baker Tilly formalized its dedicated public sector specialization more than 50 years ago. **Today, nearly 350 Baker Tilly professionals — including more than 30 principals —** focus directly on serving governments and provide hundreds of thousands of client service hours annually to organizations like the City.



Nationwide, our public sector practice serves more than 3,500 state and local governmental entities, including municipalities, counties, school districts, utilities, transit organizations, airports and special authorities. Several of these client groups are now served by dedicated specialists in distinct sub-practices.

Public sector: Experience that matters



3,500+ public sector clients**90+ years of industry experience****Serving clients nationwide**

COMMITMENT TO THE PUBLIC SECTOR

Baker Tilly has been in business for more than a century, and public sector entities were some of our first clients.

Baker Tilly and BRK Partners

We are thrilled that Baker Tilly and BRK Partners have joined forces to provide the best services to the City of Rowlett. Baker Tilly and BRK have a wealth of experience working with local government entities in a variety of areas, most importantly strategic planning, and combined expertise in local consulting services in the Dallas metropolitan region.

This exact same team recently completed an extensive 18-month strategic planning process for Rockwall County, Texas. We developed a comprehensive strategic plan that aligns with the vision for Rockwall County 2050. This recent experience, on top of our significant industry experience, gives us further belief that this team is in the best position to successfully help the City through this strategy project.

About BRK Partners

Since 2011, BRK Partners has served as a trusted strategic partner to clients across the public and private sectors. We are a boutique, multidisciplinary consulting firm specializing in strategic planning, brand positioning, message development and campaign implementation. Our work is focused on helping organizations, municipalities, churches, candidates and businesses align their purpose with clear, compelling communication strategies that drive awareness, engagement and long-term growth.



At the core of our approach is a deep understanding of each client's unique landscape. We translate that insight into integrated strategies that blend creative ideation with data-driven planning—delivering results across digital, print, in-person, experiential, crisis response, sponsorship and public engagement platforms. Whether launching a city-wide initiative or elevating a brand's market presence, BRK Partners brings clarity, cohesion and executional excellence to every campaign we lead.

July 31, 2025

City of Rowlett

RFP No. 2025-166-B

Proposal for strategic planning services

SECTION C

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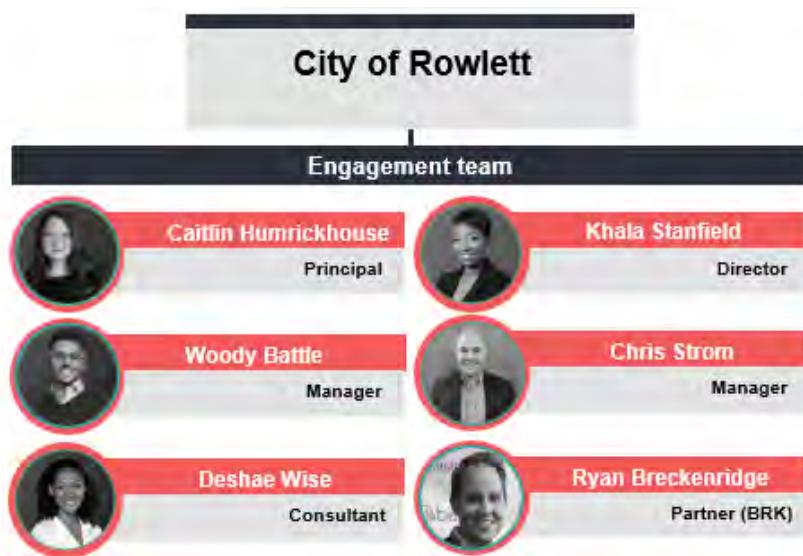
Baker Tilly US, LLP and Baker Tilly Advisory Group, LP and its subsidiary entities provide professional services through an alternative practice structure in accordance with the AICPA Code of Professional Conduct and applicable laws, regulations and professional standards. Baker Tilly US, LLP is a licensed independent CPA firm that provides attest services to clients. Baker Tilly Advisory Group, LP and its subsidiary entities provide tax and business advisory services to their clients. Baker Tilly Advisory Group, LP and its subsidiary entities are not licensed CPA firms.

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Qualifications of team members

Leading the City's strategic planning services and uncovering opportunities along the way

Meet the strategic planning team we've assembled to achieve everything you envision. Selected intentionally for your goals and backed by our specialized resources, these individuals are collaborative and multidisciplinary. Their passion for the public sector will make them an unstoppable force on your behalf. You'll find their bios and a team org chart below and complete resumes in the **Appendix**.



THE TEAM TO ACHIEVE ROWLETT'S GOAL



Caitlin Humrickhouse, MPA, SWP — Principal-in-charge

Caitlin is a principal with Baker Tilly and oversees the public sector advisory team management consulting services with a focus on assisting governmental entities in their efforts to ensure the resources available (people, processes and technology) are used in the most efficient manner and support strategy. She serves in a leadership capacity in Baker Tilly's public sector advisory team, ensuring that clients receive high quality deliverables from a team of dynamic professional consultants. She is ultimately responsible for the City's satisfaction with Baker Tilly's services.

THE TEAM TO ACHIEVE ROWLETT'S GOAL



Khala Stanfield, MBA, CSSBB — Project director and strategy expert

Khala has more than 25 years of public sector experience with a decade of experience leading strategy, performance measurement and process improvement projects. She achieves large scale organizational growth and transformation by facilitating strategic planning processes, conducting qualitative analysis and industry related research for identifying strategy portfolios and developing fact-based recommendations for senior management to enable critical decisions. In her most recent role, Khala served as the Director of Organizational Performance with the City of Glendale, AZ. She was responsible for the city's and departmental strategic plans, data analytics program, internal audit, Lean process improvements and employee and community engagement surveys and facilitation. Additional experience includes roles with the State of Arizona as Deputy Finance Manager and Executive Director for the State Employees Charitable Campaign and Assistant Professor with Western International University. She is certified in Balanced Scorecard and has Google Project Management and Lean Six Sigma Black Belt certifications.



Woody Battle, PSHRA-CP — Project manager and strategy expert

Woody works exclusively with public sector organizations to develop strategic plans, align operations to strategy and manage organizational risk. When developing strategic planning deliverables, Woody leverages six years of experience with organizational restructuring and operational audits of public sector organizations, as well as private sector experience in Fortune 500 supply chain consulting. Woody will support the project team by acting as the day-to-day project manager, organizing and participating in strategic planning facilitation sessions, community outreach and engagement and deliverable drafting. Woody has participated in strategic planning projects for over two dozen cities, counties, and municipal organizations, ranging from small to large government organizations. Woody's work has required comprehensive review of client's previous strategic planning and synthesis of stakeholder and management sentiments to recognize critical value for future planning. Woody received a bachelor's degree in environmental economics with a minor in political science from Moravian University. He is also certified in public sector leadership from Cornell University and has completed PSHRA-CP certification.



Chris Strom, MPA — Subject matter specialist

Chris focuses his consulting practice on various aspects of government, joining Baker Tilly with industry experience and a master of public administration. Prior to Baker Tilly, Chris assisted with special projects, administrative operations, and customer relations for a municipal parks district in Illinois.

A senior consultant on the public sector management consulting team, he is well-versed in general government operations and industry best practices. He specializes in providing creative solutions for operational and cost efficiency within the public sector, including shared services, staffing augmentation and strategic sourcing.

Lastly, he has direct experience managing within the administrative operations space. As a municipal employee, Chris managed many administrative projects, such as finance and human resources software system implementation, utility billing, general customer service and others. Chris earned a Master of Public Administration and a Bachelor of Science in law enforcement and justice administration from Western Illinois University.

THE TEAM TO ACHIEVE ROWLETT'S GOAL



DeShae Wise — Subject matter specialist

DeShae is a consultant with Baker Tilly's public sector advisory practice. She is a public administration professional, experienced in working with state and local governments, not-for-profit organizations and financial institutions. She works collaboratively with clients on a wide range of services, including strategic planning, operational and organizational reviews, customer service, staffing assessments, grant management, audit and financial reporting and risk management.



Ryan Breckenridge — Local strategy and consulting expert, BRK Partners

Ryan is a seasoned strategist with more than 20 years of experience leading growth, communications and complex multi-stakeholder initiatives. As Principal Strategist of BRK Partners, he helps organizations—ranging from startups and municipalities to national brands—translate vision into purposeful, results-driven implementation campaigns. His approach blends strategic planning with creative execution to build authentic connections that drive loyalty, growth and long-term impact.

Throughout his career, Ryan has led high-profile initiatives for clients such as The Home Depot, Chick-fil-A, the U.S. Olympic Committee, NASCAR and Fusch Architects. Whether advising a public agency or a private enterprise, he partners closely with leadership and operational teams to ensure every touchpoint is intentional, engaging and aligned with organizational goals.

AN INTEGRATED TEAM WORKING TOGETHER FOR SUCCESS

Each professional on your team was selected for a reason, but it's our collective brainpower and collaboration that will ultimately make a difference for the City of Rowlett.

Appendix: Resumes

PRINCIPAL

Caitlin M. Humrickhouse, MPA, SWP

Caitlin Humrickhouse is a principal with Baker Tilly's public sector advisory practice.



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bakertilly.com

Education

Master of Public Administration with
a concentration in financial
management
University of Illinois at Chicago

Bachelor of International Business
Bachelor of Spanish
University of Illinois at Urbana-
Champaign

Caitlin is a strategic workforce planner with a deep understanding of succession planning and strategic human capital management. Caitlin's other areas of expertise include benchmarking, organizational redesign and system needs assessment and selection. Prior to joining the firm, she worked at the University of Illinois at Chicago performing program and market analyses for an online education unit.

Specific experience

- Provides management consulting services with a focus on resource optimization, assisting governmental entities in their efforts to ensure the resources available (people, processes and technology) are utilized in the most efficient manner
- Reviews and redesigns core business processes to enhance internal controls, align with industry best practices, leverage available technology and create efficiencies
- Performs organizational structure analyses for local governments, examining the current state versus the future optimal state of job functions and departments
- Offers technology needs assessment and system selection services to help organizations achieve strategic goals by leveraging technology
- Prepares organizations to be sustainable and resilient in the face of workforce challenges and fiscal pressure through the application of operational and organizational reviews, succession planning and technology implementation

Industry involvement

- Illinois Association of Municipal Management Assistants
- Illinois City/County Management Association (ILCMA)
- Institute of Internal Auditors (IIA)
- International City/County Management Association (ICMA)

Community involvement

- Step Up
- Chicago Chapter of the U.S. National Committee for United Nations Women

PRINCIPAL

Caitlin M. Humrickhouse, MPA, SWP

Page 2

Thought leadership

- [CommuniTIES: How to overcome today's workforce challenges](#), podcast appearance, July 2024
- Environmental, social and governance, presenter, October 2023
- [Environmental, social and governance - a public sector webinar series](#), presenter, February 2023
- [“Workforce and succession planning – part 3: training and competitiveness,”](#) author, November 2022
- [“Workforce and succession planning – part 2: core competencies and top talent,”](#) author, November 2022
- [“Workforce and succession planning – part 1: getting started,”](#) author, October 2022
- [“The strategies and challenges of managing an evolving workforce,”](#) author, July 2022
- [“Strategic talent management,”](#) author, July 2022
- [“Recession proofing: six actions governments and not-for-profits should take to prepare for revenue shortages,”](#) author, April 2020

Continuing professional education

- Strategic Workforce Planner, Human Capital Institute

DIRECTOR

Khala Stanfield

Khala Stanfield is a director with Baker Tilly's public sector practice.



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Education

Master of Business Administration
in marketing
University of Phoenix

Bachelor of Science in global
business and financial
management
Arizona State University

Khala has more than 10 years of experience in achieving large scale organizational growth by facilitating strategic planning processes, conducting qualitative analysis and industry related research for strategy portfolios and developing fact-based recommendations for leaders to enable critical decisions.

As a trusted advisor, she has identified hidden opportunities and developed innovative solutions in collaboration with key stakeholders to help deliver results. Khala also leverages her adaptive leadership skills to empower individuals and teams to achieve their goals and objectives.

Specific experience

- Boosted stakeholder engagement by 50% through building a performance and change management framework that aligned departmental plans with city objectives, key performance indicators (KPIs), and objectives and key results (OKRs)
- Attained 25% in time savings by automating processes and workflows of learning, technology, and analytics, integrating continuous improvements, and overseeing process improvement teams on implementations using LEAN/SCRUM/Kaizen methodologies
- Achieved a What Works Cities gold certification for 2022. Recognized for work on Balanced Scorecard performance implementation, performance management strategies, and the open data portal. The only city in the United States to receive Gold Certification in 2022
- Performed research studies for public and internal policy propositions
- Served as a finance lead and procurement specialist for HR functions, managed capital and noncapital budgets
- Fostered more than \$800,000 for 300 local, state, national and global not-for-profits annually by working with the executive leadership team to solicit not-for-profit organizations to encourage employees to donate or volunteer
- Led the operations, procurement, human resources, training, and marketing plan development for domestic and international not-for-profits
- Awarded the certificate of distinction for 2018, 2019 and 2020 by serving as the citywide coordinator for the International City and County Management Association for adeptly executing performance measurements

DIRECTOR

Khala Stanfield

Page 2

Community involvement

- National Forum for Black Public Administrators Central Arizona Chapter, president-elect
- National Forum for Black Public Administrators, National Corporate Council member
- Arizona State University Alumni, executive board member
- Toastmasters International, Distinguished Toastmaster Certification, former administration manager and Arizona division director
- Bethany Church, financial administrator

Thought leadership

“Data-driven cities: A practical guide for public servants”, Baker Tilly, 2025

“Fostering unity in strategic priorities: a guide to alignment and success”, Baker Tilly, 2023

“Strategic planning for results: planning, implementation and performance measurement strategies,” Baker Tilly Utility University, 2023

Continuing professional education

- Aveta Business Institute, Lean Six Sigma Black Belt certified
- Google Project Management Certification
- Balanced Scorecard Institute, Balanced Scorecard Professional certification
- State of Arizona, Supervisor Academy certification

Awards and recognition

- “20 Diverse Business Leaders to Watch in 2021”, Arizona Big Media

Woody Battle, PSHRA-CP

Woody Battle is a manager with Baker Tilly's public sector advisory practice.



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Education

Bachelor of Arts in environmental
economics and policy
Moravian University
(Bethlehem, Pennsylvania)

As a public sector advisory manager, Woody has more than six years of experience developing strategic plans, aligning operations to strategy and managing organizational risk. He leverages experience with organizational restructuring and operational audits of public sector organizations, and financial analysis for private multi-national organizations, as well as private sector experience in Fortune 500 supply chain consulting.

Specific experience

- Special focus on the facilitation of strategic planning, assessment and implementation for public sector entities including regional authorities and large counties and cities
- Extensive experience coordinating directly with Baker Tilly team members to plan, develop, facilitate and draft various public sector consulting deliverables; client reporting and research including detail-oriented presentations
- Assists with interviews, data management and analysis, reporting, in-person facilitation and logistical support
- Assesses and documents client resources to determine current and desired operating states to ensure alignment with organizational vision and goals, mission and execution of previous strategic planning targets
- Performs gap analyses with clients to support their identification of critical business needs and ascertain strategic, cost-efficient solutions that can be implemented to address gaps within operations
- As a transfer pricing consultant with Baker Tilly (2019-2021), Woody conducted and supported background research, benchmarking research, model creation and report drafting for client deliverables which included models, consultative reports and other proposals and ad hoc requests on complex internal concepts
- Experience in research and supply chain consulting for a Fortune 500 company involving self-designed, methodological research including extensive Excel suite, Google suite and Word document applications as well as significant communication and process mapping with high-level executives

Industry involvement

- Government Finance Officers Association of Pennsylvania (GFOA-PA)
- Public Sector Human Resources Association (PSHRA)
- National Forum for Black Public Administrators (NFBPA)

MANAGER

Woody Battle

Page 2

Thought leadership

- “[Three key strategies to keep employees](#),” author, March 2023
- “Retaining and Engaging Public Sector Workforces,” Accelerating Indiana Municipalities (AIM) Conference, speaker, 2022
- “Empowering Innovation: Unleashing Potential with Microsoft Power Platform” (AIM) Conference, speaker 2024

Continuing professional education

- International Public Management Association for Human Resources (IPMA-HR) Certified Professional (IPMA-CP)
- eCornell Public Sector Leadership certificate

MANAGER

Christopher Strom, MPA

Christopher Strom is a manager with Baker Tilly's public sector advisory practice.



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Education

Master of Public Administration
Bachelor of Science in law
enforcement and justice
administration
Western Illinois University
(Macomb, Illinois)

As a manager on the public sector advisory practice, Christopher is staffed on various types of projects such as strategic planning, comprehensive planning, organizational/operational reviews, business process reviews, system implementation and many others.

Christopher specializes in multiple aspects of government, joining Baker Tilly with four years of industry experience. During his time before joining the public sector practice, Christopher has experience within parks and recreation, public works, information technology, administration, finance, community development, public safety and capital project planning. Following his education, he held various positions with the Elmhurst Park District, the Village of Itasca, the DuPage mayors and manager's conference and the Village of Kenilworth.

Aside from his career experience and education, Christopher takes pride in creating trusting professional relationships with the goal of delivering effective results.

Specific experience

- Budgeting
- Business process review
- Comprehensive planning
- Customer service
- Financial system implementation
- Grant writing and post award management
- Operational and organizational policy audit
- Operational and organizational reviews
- Policy creation and implementation
- Project management
- Strategic planning

Industry involvement

- Illinois City/County Management Association
- Illinois Association of Municipal Management Assistants

Community involvement

- PADS Shelter Program (homeless shelter volunteer)
- Habitat for Humanity Certified Fraud Examiner (CFE)

Deshae Wise, MPA

Deshae Wise is a consultant with Baker Tilly's public sector advisory practice



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Education

Master of Public Service and
Administration, concentration in
state and local government
Texas A&M University, Bush
School of Government

Bachelor of Science in business
administration
University of California, Berkeley,
Haas School of Business

Deshae is a public administration professional, experienced in working with state and local governments, not-for-profit organizations and financial institutions. She works collaboratively with clients on a wide range of services, including strategic planning, operational and organizational reviews, customer service, staffing assessments, grant management, audit and financial reporting, and risk management.

Specific experience

- Conducted an internal audit assessment to identify opportunities to improve effectiveness of business processes and enhance controls, resulting in the alignment of company operations with industry best practices
- Optimized client resources through data analysis and interview preparation, contributing to the strategic planning process
- Researched and monitored grant opportunities for Indian Tribal Nations, providing vital information for the grant writing process and tribal nation's goal of achieving economic energy independence
- Optimized financials for a not-for-profit by designing and delivering a cost-constraint solution for their annual donor event
- Assisted local governments in preparing annual comprehensive financial reports that receive the Government Finance Officers Association (GFOA) certificate
- Defined scope of work consistent with strategic and financial goals of client, producing a report and presenting associated data

Industry involvement

- National Forum for Black Public Administrators (NFBPA)
- Management Leadership for Tomorrow (MLT)

Community involvement

- Houston Pets Alive!, volunteer

FOUNDER AND PRESIDENT

Ryan Breckenridge

Ryan Breckenridge is the founder and president of BRK Partners.



BRK PARTNERS



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Education

Bachelor of Arts in journalism
advertising/public relations
University of Arkansas

Ryan is a founder, executive and operator who combines a competitive mindset with a collaborative spirit to help clients and teams achieve meaningful results. With a proven ability to craft and execute comprehensive campaigns, distill complex ideas into clear strategies and drive significant revenue growth, he has earned the trust of some of America's most respected brands, organizations and public sector initiatives.

Known for blending creative vision with strategic leadership, Ryan specializes in guiding teams and initiatives that generate measurable outcomes and lasting impact. He partners with leaders, innovators and practitioners to build customer engagement, foster loyalty and position organizations for long-term success.

Specific experience

- Develop and lead strategic initiatives that enable clients to thrive by leveraging market research, consumer insights and data to shape how people engage with products, services and mission-driven initiatives
- Plan and deliver short-, mid- and long-term campaigns—encompassing strategy, positioning and messaging—with a focus on effectively reaching and resonating with target audiences
- Facilitate vision-casting, cross-functional leadership alignment and personnel management across multidisciplinary teams to drive collaboration and ensure the successful execution of complex initiatives
- Design and manage comprehensive ecosystem engagement strategies for clients entering new markets, launching products or repositioning their brand—successfully connecting with both current and prospective consumer and business audiences
- Provide continuous research and market intelligence to ensure clients remain well-positioned in their category, stand apart from competitors and are prepared to navigate emerging opportunities and challenges
- Lead the development and execution of organizational vision, strategic planning, operations, sales, financial forecasting, team leadership, brand messaging and marketing efforts to drive sustainable growth across both public and private sector engagements

Leadership and volunteer work

- Rockwall County (Texas) 2050 Strategic Plan: Co-Chairman
- YoungLife: Committee Chairman & Member, Rockwall County (Texas), Richardson (Texas)
- Watermark Community Church: Student ministry leadership
- City of Rockwall: Youth baseball and football coach. Member of Board of Advisors
- Rockwall Independent School District: Bond Committee Co-Chairman

July 31, 2025

City of Rowlett

RFP No. 2025-166-B

Proposal for strategic planning services

SECTION D

The information provided here is of a general nature and is not intended to address the specific circumstances of any individual or entity. In specific circumstances, the services of a professional should be sought. © 2025 Baker Tilly Advisory Group, LP.

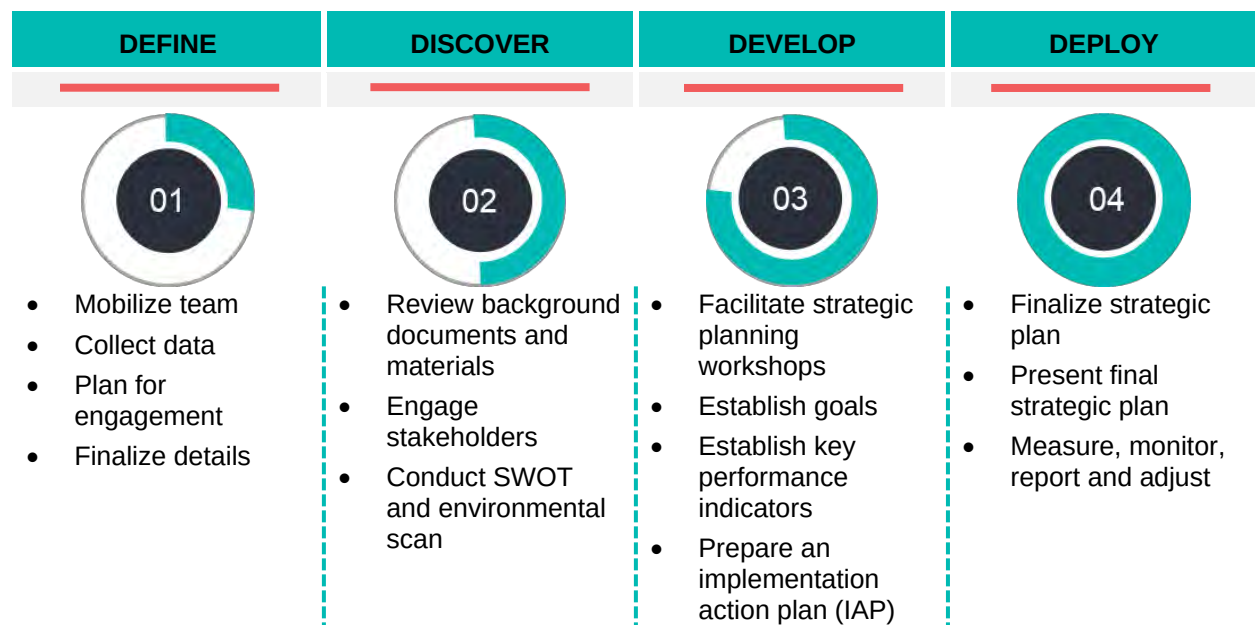
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Project approach and methodology

Philosophy, approach, methodology

Baker Tilly's strategic planning approach and expertise inform our reliable and repeatable methodology for completing strategic planning projects. Your Baker Tilly team has applied and refined the selected techniques over many years of helping organizations with their strategic planning programs, organized within a structured yet flexible framework.



Phase 1—Define

The purpose of the work in the Define phase is to successfully initiate the strategic planning project, verify timelines, due dates, and budgets, and to initiate the extensive data collection, interviewing and engagement tasks necessary to lay the groundwork for creating a refreshed City strategic plan.

PHASE 1 ACTIVITIES	
	Project initiation and ongoing project management In this step, we will work closely with the City of Rowlett project management team to clarify and refine the facilitation planning process including scope, budget, timing and deliverables of the strategic plan. Completion of this task helps to ensure a shared understanding between the City and the consulting team of the answers to questions such as:
1.1	• How will the new strategic plan guide the City in achieving their goals in the future? • Who should be involved in preparation, review and approval of the strategic plan, and how? Primary activities included within this task are: • Conduct initial project kickoff meeting with the Rowlett project team. • Confirm project management and reporting protocols.

PROJECT APPROACH AND METHODOLOGY

PHASE 1 ACTIVITIES	
	- Discuss, at a high level, the "business landscape" for the City in terms of the operating environment, critical issues, funding streams, policy priorities, etc. - Initiate logistical planning and coordination for internal workshops, as well as developing an outreach plan for the multiple stakeholder groups.
1.2	Request, gather and review background data and materials The consulting team will request, gather and review a considerable amount of documentary data as background for the planning project. Examples of the types of data we will request — to the extent available — include: - Current operating budget - Comprehensive Annual Financial Report - Capital improvement program - Comprehensive Plan - Neighborhood Plans - Key reports, studies, plans and other internal analyses of department plans - Goals, objectives, performance measures and results by department - City-wide and departmental organizational charts - Prior community and employee survey results - Other information pertinent to the project
1.3	Develop stakeholder engagement and outreach plan Based on information developed through the initial kickoff meeting and in consultation with the City, the project team will draft and review a written plan for the engagement and involvement of a variety of important stakeholder interests. The engagement plan will be designed with a view towards people-first values and will list the various internal and external stakeholder interests and groups to include, suggest engagement methods for each, identify those accountable for completion of the proposed engagement activities and recommend a tentative schedule. Examples of the range of engagement techniques that could be applied include: - Project website - Online survey - Social media - Municipal official interviews - Key leader/influencer interviews - Mentimeter polls/surveys - Community advisory groups - Community meetings/forums - Internal and external focus groups - Vision boards "Meeting in a box" - Media relations support - Social Pinpoint - Town Halls
1.4	Finalize project scope The final project plan will address all the activities necessary to complete the strategic planning project, establish key deliverable due dates and other significant project milestones and indicate resource assignments.
Deliverables - Initial data request - Stakeholder engagement and outreach plan - Project initiation memo	

Phase 2—Discover

The Discover phase is the primary data collection stage of the planning process and includes the internal interviews, focus groups and research effort. Completion of these tasks provides the consulting team with the foundation of data, facts and understanding necessary to develop an effective strategic plan, promote buy-in and support, and ensure alignment with the policy intent and priorities of the organization's elected and appointed leadership.

PHASE 2 ACTIVITIES	
2.1	Internal stakeholder engagement and outreach Discovery interviews will be conducted individually with each Council member and the Mayor (<u>7</u> interviews). We will discuss the key organizational, operational, financial, service delivery and other topics relevant to the current state and future strategic direction of Rowlett. The consulting team will meet with executive leaders throughout the City to ensure a comprehensive understanding of City day-to-day management and their resonant themes, topics of concern and future direction. We anticipate <u>8</u> executive/departments leadership interviews. Additionally, the consulting team will facilitate up to <u>4</u> in-person focus groups with a representative cross section of the City staff and all departments. All interviews will be conducted during a multi-day onsite visit, facilitated by local and national Baker Tilly project managers and contributing team members. We can conduct interviews virtually upon need.
2.2	(OPTIONAL) Community stakeholder engagement and outreach Baker Tilly often facilitates community involvement as a cornerstone of successful strategic planning processes. If the City is interested, Baker Tilly can offer slight additions to pricing to facilitate community engagement. The desired outcome would be to facilitate community outreach efforts that will result in obtaining a robust array of suggestions from community members and leaders regarding the vision of the City and will eventually serve as a framework for the strategic planning process. • Focus groups for real-time community feedback input — The City, residents, business and non-profit owners, economic development leaders and other community stakeholders, will be invited to three facilitated in-person and three facilitated virtual focus groups, to share real time strengths and challenges and aspirations of the City. • Public engagement and input gathering — The stakeholder engagement strategy will also include tactics for best gathering valuable input from the general public. These will include coordinating public information forums/meetings as well as a public survey. To ensure diverse participation, we may recommend strategies such as reaching stakeholders by incorporating paid social media into gathering input.

PROJECT APPROACH AND METHODOLOGY

PHASE 2 ACTIVITIES

Discover phase findings summary report (Environmental Scan, Survey Results and SWOT)

2.3

The consulting team will work to develop a solid understanding of the "as-is" organizational model and strategic challenges facing the City by conducting an environmental scan and SWOT analysis. The environmental scan will feature a detailed review of City-provided documents, available economic data, industry literature, historical trends, both quantitative and qualitative internal performance metrics. The environmental scan will also focus on developing an inventory of City resources, including but not limited to, finances, infrastructure, staff, education, healthcare, business development, job opportunities, housing, arts, culture, heritage, history, recreation, entertainment and other valuable community insights, current trends and topics influencing and impacting the community. The SWOT analysis will be a collaborative effort to determine and identify Rowlett's strengths, weaknesses, opportunities (assets) and threats operationally and involving the community.

The consulting team will prepare a presentation-style summary of the Discover phase results, findings and conclusions of all Discover phase tasks.

Deliverables

- Discover phase findings summary

Phase 3—Develop

This phase of work comprises the tasks necessary for the preparation and adoption of a new organizational strategic plan for the City. The principal tasks in the Develop phase center on the leadership and members of Rowlett, along with such other key participants in the City's broader strategic planning ecosystem.

PHASE 3 ACTIVITIES

Design and facilitate strategic planning workshop

3.1

In this task, the project team will define and document the participants, agenda, process, and logistics required for a full-day strategic planning workshop for the City's elected officials, appointed leaders and other key participants in the strategic planning process deemed as appropriate. This retreat-style workshop will be designed as an intensive, active and engaging event, promoting collaboration and consensus-building around a mission-critical set of strategic goals and priorities. Representative activities for this task include:

- Identify and finalize the list of participants
- Develop the workshop activities and agenda
- Coordinate the workshop venue and logistical details with the City Manager
- Present the workshop design for final approval to the City Council, City leaders and others as needed

Additionally, this task includes several critical sub-tasks to lead the City Council, and other Rowlett leadership through the process of establishing the City's new strategic plan.

PHASE 3 ACTIVITIES

Task 3.1.1—Review current environment, stakeholder input and feedback

This sub-task includes an examination of the internal and external environment within which the organization must operate and succeed. It considers such factors as social and economic trends, political and regulatory actions, emerging technology, customer needs and other uncertainties. The strategic context map establishes the environmental conditions which are most likely to have an impact on the City's ability to achieve its mission, consistent with its vision and values. The workshop participants will then create their own, summarized view of the current context and SWOT analysis based on their knowledge and the results of the consulting team's data gathering, outreach and engagement efforts.

Task 3.1.2—Develop vision, mission and core values

Effective strategy must rest on a shared and clearly articulated understanding of the organization's overarching purposes and goals. This is most commonly expressed and documented in the form of concise and memorable statements of the organization's vision (typically aspirational in nature), a focused statement of mission (more action-oriented than the vision) and a brief listing of core values (the ethical parameters within which the vision and mission will be realized).

In this step, we will review existing and previous vision, mission and values used by the City, and identify examples from other peer organizations or examples that align with the City leadership's aspirations. We will identify opportunities to align, update and generate new vision, mission and value concepts from fieldwork interviews, documentation reviewed and our experience with similar organizations. After generated, we will present multiple high quality and impactful options to Rowlett leadership for their review, adjustment and final approval during our strategy sessions.

Task 3.1.3—Develop and prioritize strategic goals and objectives

Using a collaborative and interactive process, supported by advanced technology tools for group consensus building and prioritization, the project team will facilitate the definition of strategic goals for the City leadership. These goals will then be ranked, ordered and evaluated in terms of their strategic importance and current performance in the identified areas to establish those goals that, if achieved, can have the most impact on the organization's ability to achieve its mission. These goals constitute the "whats" of the strategic plan. These will address strategic needs and serve as the City's roadmap for the future.

Task 3.1.4—Develop operating initiatives

After the high-level strategic goals are established, the team's professionals will next work closely with Rowlett staff to more fully develop the specific operating initiatives needed to achieve the strategic goals established in the planning workshop/retreat participants. For each objective and supporting initiative, a target completion date will be established, and the accountable staff member name(s) or title(s) will be specifically identified. We will do this through the process of a one to two day facilitated training workshop/retreat, supported by pre-work and post-workshop validation for City staff and, potentially, other participants in the planning process.

PHASE 3 ACTIVITIES

3.2 Develop action plan, key performance metrics and reporting methods

We will develop an action plan for implementing the strategic plan. Key performance indicators (KPI) and performance targets will be established for each strategic objective to be included in the final strategic plan. City leaders will review proposed KPIs initially at the planning workshop/retreat, recommended by Baker Tilly facilitators and analysts. They will approve, and the approved KPIs will then be incorporated into a standardized reporting model format and regular reporting process recommended to the City based on best practices for strategy reporting processes.

3.3 Finalize the City strategic plan and executive summary

The final task involves the compilation of all previously developed elements of the City's revised and updated strategic plan into a cohesive and attractive document. Organized within the conceptual structure illustrated to the right, the strategic plan will serve as an effective tool for communicating the plan to the organization and the public, and for sustaining and renewing a strategy-focused approach to policy leadership and organizational management over time. The strategic plan document will first be presented in draft form for review and comment and then revised and refined as needed based on comments received.



3.4 Present final strategic plan to the City

Baker Tilly will present the final strategic plan in a public meeting with City Council members and plan makers present. Once reviewed for public comment and voted on by City Council, Baker Tilly will begin implementation efforts for the engagement.

Deliverables

- Strategic deployment roadmap
- Final strategic plan

Phase 4—Deploy

During the Deploy phase of the methodology, the center of gravity of the strategic planning effort begins to shift away from the Baker Tilly consulting team and toward the staff members responsible for the leadership and execution of the adopted plan. In this phase of the strategic planning methodology, the consulting team can be available to transfer knowledge and understanding, support and coach leadership on the implementation and sustainment of the adopted strategic plan and provide change management guidance in the transition from the current state to the desired future state. Examples of the type of work that could be included in this phase are described below.

PHASE 4 ACTIVITIES	
4.1	Establish strategic plan implementation teams Baker Tilly consultants will work with City and other internal and external partners to create cross functional staff implementation teams and sub teams based on the adopted strategic plan and implementation roadmap. We will work with and through the City Manager to identify implementation team leaders, participants and points of contact and to secure their commitment to their assigned implementation responsibilities. Additionally, the project consultants can support the development of an overall program management structure and team to integrate organizational implementation efforts with other, ongoing efforts within the City as needed. During this phase Baker Tilly will gather all documents, graphics, working-versions and artifacts/research for the engagement and share with Rowlett for future use.
4.2	Prepare a change management and communication plan Effective change management and communication are essential to both the initial success of the planning process and to the organization's ability to sustain momentum over time. Leveraging our firm's significant knowledge base and change management best practices, Baker Tilly will develop and recommend a change management and communication plan for the review, adoption and ultimate execution by the cross-functional implementation teams. The change management and communication plan will be based on our eight-level organizational change management model, illustrated here. That model is adaptable to fit unique client needs and scale to each individual project. At its core, our change management methodology ensures that business integration is successful and required organizational changes are met with maximum acceptance and commitment. Effective change management will help the City: • Ensure organizational readiness for changes to processes, systems, roles and responsibilities that could result from the new strategy • Ease the adoption of cultural changes • Diagnose gaps and manage resistance • Reduce both the depth and duration of business disruption caused by change • Support achievement and acceleration of the strategic plan deployment 

PHASE 4 ACTIVITIES

4.3

Implementation management training and support

Baker Tilly will review the implementation, change management and communications planning activities with Rowlett leaders, department directors and City employees. Through multiple facilitated, virtual meetings, Baker Tilly will ensure the City is moving together as one collective unit, with strong understanding of the strategic plan and individual accountabilities. Baker Tilly will develop training and roles supporting materials to provide to the City.

(OPTIONAL) Implement strategic plan management software

Recent years have seen the development of robust, moderately priced, cloud-based technology tools to facilitate the strategy deployment and results tracking and reporting processes. These tools allow for a more rapid, effective and sustainable transition from strategic planning to strategic management.

Among the leading providers of strategy management software in the local government market today is a company called Envisio. The strategy, data analytics, performance evaluation and reporting functionality supports important strategic management needs, including:



4.4

- Alignment of the strategic plan and financial plans
- Aggregation and visualization of results data
- Organizational and community dashboards to drive transparency
- Management of employee performance
- Performance benchmarking

Baker Tilly has a strategic alliance with Envisio, though we are neither a reseller nor an implementer of the Envisio application suite. We can provide value-added professional services in the design of performance dashboards and reporting tools to assist the City in the tracking and monitoring of the strategic plan progress and of the progress of any other planning process the City may have. Examples could include the annual budget, capital improvement plan, economic development plan and others. Should the City be interested in exploring such a technology capability, we can arrange for a product demonstration and provide costing for Rowlett's consideration.

Deliverables

- Recommended strategy implementation team structure
- Change management and communications plan
- Strategic plan management software (*optional*)

Inspiring through a case study while shielding privacy

You won't see the name behind the story because the work we do for our clients is often highly confidential and competition-sensitive — we respect our clients' confidentiality.

At the same time, we know you have an important decision to make. If references or a client list is the final item in your decision to award the contract to Baker Tilly, we will request permission and share specific organization names. Just let us know, and we'll move forward.

A STRATEGIC VISION FOR AN URBAN CITY IN THE SOUTHERN U.S. <i>Strategic plan</i>	
Client need	The Town is situated in a fast-growing region in a high potential and highly sought after location for residents and commuters alike. Trying to maintain a small-town feel, navigating pressures from neighboring communities and state legislation, and trying to best predict success in the coming years, the Town realized the need for a cohesive voice, and plan that would help capture the current state and point the way success in the coming years.
Baker Tilly solution	The Town engaged Baker Tilly's strategic planning professionals to develop this plan. But Baker Tilly recognized the needs of the Town expanded beyond the standard Council led strategic plan. The Town wanted a more comprehensive financial forecast model, an economic development assessment, and an over-arching strategic plan to leverage the financial and economic realities. Baker Tilly engaged closely with the Town through a closely managed strategy development process that included multiple site visits, economic development ariel tours, facilitated strategy workshop sessions and financial forecast model reviews. After substantial data gathering, interviews and in-person/community feedback was gathered, Baker Tilly worked with the Town Council to organize priorities into their future roadmap.
Results	Baker Tilly's plan for the Town was unanimously approved by the Council after review and delivery, highlighting the support for the plan and successes in reaching financial, economic and strategic challenge of guiding and advising the future of the Town.

July 31, 2025

City of Rowlett

RFP No. 2025-166-B

Proposal for strategic planning services

SECTION E

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Implementation, monitoring and reporting

Turning strategy into results

Many strategic planning efforts fall short, primarily due to challenges in execution rather than the adoption of a flawed strategy. Therefore, this task involves developing a written plan to operationalize the new strategy, along with recommendations for its periodic evaluation and revision throughout its expected lifespan.

The engagement team will prepare an Implementation Action Plan (IAP). The IAP is the blueprint for carrying out the strategic plan. It contains the detailed steps that must be taken to ensure that the goals and strategies are achieved. The IAP will provide a framework for determining specific timelines, assignments and financial forecasts. It is designed as a management tool to help the organization ensure that goals are attained, and it is suited to periodic check-ins about progress, changes or challenges.

A sample IAP is provided on the following page.

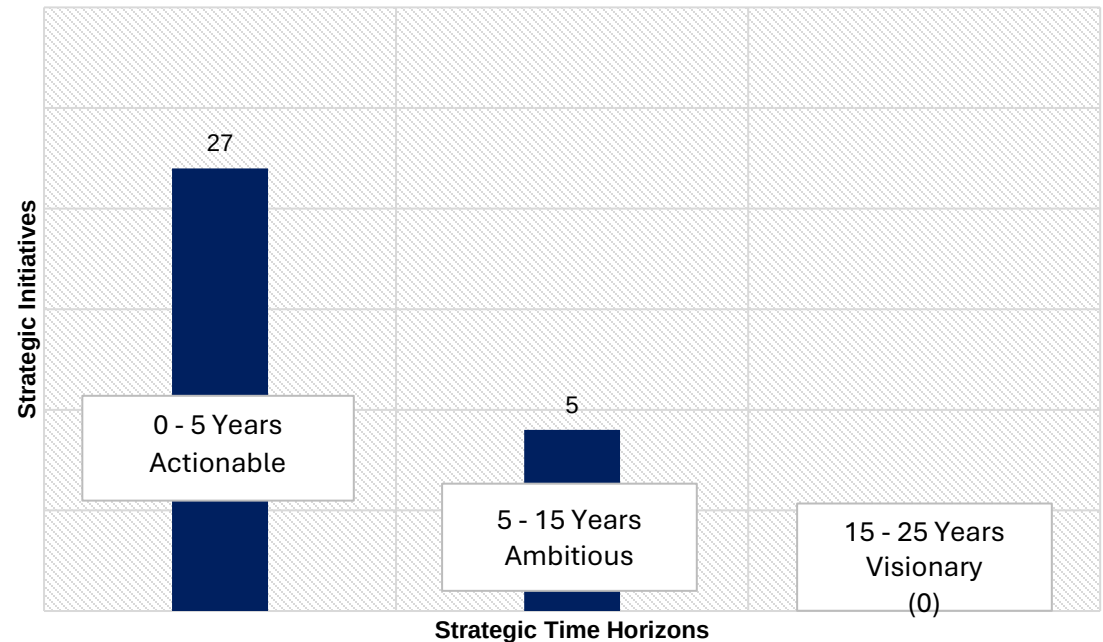
Strategic Goals and Operating Initiatives

Within each strategic goal there are between four-to-six operating initiatives required for achieving that strategic goal. Since most initiatives fall within the 'Actionable' time-horizon, implementation management will require focusing here for Year 1 of the Strategic Plan. 27 of 32 initiatives fall within the Actionable time-horizon. Near term focus is expected for first-strategic plans. The Rockwall County Strategic Plan 2050 aligns with other county strategic plans for focusing on early success of initiatives.

We recommend the County working groups and operating initiative owners prioritize immediate next steps, and requirements for achieving each Operating Initiative. Potential obstacles that may impact the ability to achieve the Plan include:

- ❖ Rockwall County Commissioners Court does not control the full budgets of all departments that will be responsible for helping achieve the Strategic Plan.
- ❖ Change in leadership among elected officials may impact the adherence to the plans for executing operating initiatives.
- ❖ Aligning with the Vision, Mission, and Values needs to be an ongoing task to maintain the functions across individuals and teams are in alignment with the spirit of the overall Strategic Plan.

Operating Initiatives by Time Horizon (2025-2050)



Throughout the planning process, multiple iterations of KPIs and initial tasks were developed through workshop and steering committee discussions. We recommend the County consider the following initial tasks and KPIs as “proposed”, and to develop or refine additional KPIs and initial tasks within detailed workplans for each operating initiative and working group.

Strategic Goal #1: Promote Trust and Transparency in Governmental Operations

Trust and transparency are the foundation of effective Rockwall County operations, ensuring accountability and fostering community confidence. Clear communication and ethical decision-making promote more equitable and efficient services, toward which we strive.

Operating Initiative	Proposed Initial Task	Proposed Key Performance Indicators	Operating Initiative Owner(s)	Time Horizon
1. Create a County Public Communications Plan to enhance citizen participation and awareness.	Create a written County Public Communication Plan. Revise website and capture public usage and feedback data. Conduct constituent feedback surveys.	Engagement % increase for new and existing data channels (website, etc.). Customer/Constituent Satisfaction Rate (%).		Actionable 0 – 5 Years Completion (FY2025)
2. Adopt a public-facing dashboard that ties the strategic plan to actions and budget.	FY25 adopt solution and begin training. FY26 full implementation. Establish tracking of projects and programs to budget execution through software dashboard.	% of strategic goals achieved by intended time horizon. % of budget impact.		Actionable 0 – 5 Years Completion (FY2025)
3. Review and refine the roles and responsibilities of key positions.	Review, verify or update job descriptions for identified positions.	% of job descriptions to include aligned responsibilities.		Actionable 0 – 5 Years Completion (FY2025)
4. Create a County Commissioners Court Advisory Council.	Define the membership and scope for the Advisory Council (set expectations). Ensure members of the council are representative of Rockwall views and equities.	% of recommendations adopted by Commissioner's Court.		Actionable 0 – 5 Years Completion (FY2025)
5. Create an internal County "Futures Group" focused on trends in innovation, cyber-security and technology for adoption.	Establish charter and membership. Identify technology that can gather input and manage topics. Set meeting schedule and expectations; include outside advisory support.	% of recommendations adopted by Commissioner's Court.		Actionable 0 – 5 Years Completion (FY2025)

Strategic Goal #1: Promote Trust and Transparency in Governmental Operations

Trust and transparency are the foundation of effective Rockwall County operations, ensuring accountability and fostering community confidence. Clear communication and ethical decision-making promote more equitable and efficient services, toward which we strive.

6. Find ways to better integrate and expand the roles of existing public committees, and review and engage with outside entities that can provide support for unfulfilled needs.	Review existing committees and scope.	% increase in expanded roles of existing public committees' functions.		Ambitious 5 – 15 Years Completion
	Review and identify any unfulfilled needs for additional committees.			
	Review of outside entities that can provide support for unfulfilled needs.	% engagement increase of existing and new public committees.		

Strategic Goal #2: Position the County Government for Growth

Preparing for growth is essential to ensure sustainable infrastructure and high quality of life for our residents. Proactive planning will help us manage resources, attract economic development, and anticipate future needs, fostering balanced growth and our community well-being.

Operating Initiative	Proposed Initial Task	Proposed Key Performance Indicators	Operating Initiative Owner(s)	Time Horizon
1. Create and implement integrated priority-based planning, programming, budgeting, and execution process.	FY25 creation of a County resource allocation process that supports financial management decision-making.	% of budget aligned and integrated with planning process.		Actionable 0 – 5 Years Completion (FY2025)
	Annual program and budget guidance to elected officials and directors.			
	Review and adjust County Financial Reserve Policy.			
2. Update and revise the County Facilities Masterplan to evaluate existing facilities, establish future requirements and create a time-phased plan and budget.	FY25 update current Facilities Masterplan.	% of facilities plans executed within target timeline.		Actionable 0 – 5 Years Completion (FY2025)
	Create county growth scenarios to determine range of needs.			
	Review updates every five years, including technology offsets.			
3. Conduct a review and plan to forecast capability needs required to accomplish the County's roles and missions under demanding growth scenarios.	FY25 conduct a planning processes exercise to develop plausible scenarios growth.	% of forecast capabilities and needs adopted.		Actionable 0 – 5 Years Completion (FY2025)
	Establish the range of potential requirements to address potential growth.			
	Identify industry or other standards to establish potential growth impacts.			
4. Conduct a study, and review periodically, to identify best practices for the County's organizational structure, position classifications and total compensation.	Conduct a review every 2-3 years to identify structure, staffing and compensation potential models.	% of new best practices / recommendations implemented by County departments.		Actionable 0 – 5 Years Completion (FY2025)

Strategic Goal #2: Position the County Government for Growth			
Preparing for growth is essential to ensure sustainable infrastructure and high quality of life for our residents. Proactive planning will help us manage resources, attract economic development, and anticipate future needs, fostering balanced growth and our community well-being.			
5. Review established internal County government working groups to ensure alignment of actions and resources to the Strategic Plan vision and goals.	Annual meeting with quarterly updates (as required) with the elected officials and department heads to review the Rockwall 2050 plan and make recommendations for the Court's consideration.	% alignment of County department actions and resources with strategic vision and goals. % of actions completed towards the initiative.	Actionable 0 – 5 Years Completion (FY2025)

Strategic Goal #3: Strengthen Local, Regional, State, and Federal Collaboration

Strengthening collaboration and partnerships is vital for us to address complex challenges. Effective partnerships will allow necessary expertise, funding, and innovative solutions to meet our County's needs.

Operating Initiative	Proposed Initial Task	Proposed Key Performance Indicators	Operating Initiative Owner(s)	Time Horizon
1. Establish Rockwall County legislative priorities integrating appropriate agencies at the local, state and federal level; create legislative strategies to increase the County's and cities' authority over approvals and oversight of Municipal Utility Districts and other Special Purpose Districts.	Commissioners Court collaborate with state representatives, cities and ISDs to identify common initiatives.	# of bills introduced.		Actionable 0 – 5 Years Completion (FY2025)
	Creation of a prioritized list of County legislative priorities.	% of bills receiving Committee Hearing.		
	Develop at list of all bills of interest that Rockwall County will support or oppose in each legislative session.	% of bills adopted by Committee.		
	Establish Legislative Action Committee (County, City, defined stakeholders).	% of bills amended.		
	Develop Legislative Action Calendar.	# of bills cohesively identified, tracked, and pursued by the cities and County.		
	Establish Legislative strategy and priority bills.			
2. Host "Rockwall 2050 Growth Summits" with county, cities, developers, independent school districts, North Texas Municipal Water District, and other key stakeholders including chambers of commerce and economic development corporations.	FY26 hold first growth summit.	% increase in participation from targeted Rockwall County entities and stakeholders.		Actionable 0 – 5 Years Completion (FY2025)
	Create playbook for agreed collaboration points with agreement on apportionment.			

Strategic Goal #3: Strengthen Local, Regional, State, and Federal Collaboration

Strengthening collaboration and partnerships is vital for us to address complex challenges. Effective partnerships will allow necessary expertise, funding, and innovative solutions to meet our County's needs.

3. Create an alliance among the County, cities, school districts and local, state, and federal agencies.	Creation of a charter with common goals and objectives.	% increase in communication with participant agencies compared to prior year.		Actionable 0 – 5 Years Completion (FY2025)
4. Conduct a study to identify compatible land use and growth management guidelines, standards, and cost responsibility burden apportionment within state law.	Develop action list including necessary legislative action to change/adopt code. Establish apportionment and integrate into county subdivision guidelines.	% of compatible land use growth management guidelines adopted and actively leveraged.		Actionable 0 – 5 Years Completion (FY2025)
5. Leverage strong working relationships with the North Central Texas Council of Governments (NCTCOG), North Texas Commission (NTC), Texas Association of Counties (TAC), the Texas Conference of Urban Counties, and others.	Establish recurring meetings with key contacts for the identified agencies and organizations to enhance relationships.	Frequency of meetings between applicable entities. % increase compared to recent years. Frequency of meetings between applicable entities. % increase compared to recent years. % increase of Rockwall County proposals or initiatives submitted to the regional entities. % of Rockwall County proposals or initiatives		Actionable 0 – 5 Years Completion (FY2025)

Strategic Goal #3: Strengthen Local, Regional, State, and Federal Collaboration

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		adopted or taken up by the regional entities.		
		% of Rockwall County representatives on the board or committees of the regional entities.		
6. Increase public awareness of water supply needs and conservation programs and tools.	Collaborate with North Texas Municipal Water District (NTMWD) and support cities to educate and inform the public of future water supply needs and importance of conservation.	% increase in city and county wide use of internet-based lawn irrigation tools to conserve and water smartly.		Ambitious 5 – 15 Years Completion
	Collaborate with NTMWD and cities to develop a playbook for agreed priority programs and tools to conserve water.			

Strategic Goal #4: Invest in County-wide Infrastructure

Well-maintained roads, utilities, storm runoff and drainage, and broadband access promote healthy communities and attract business, creating jobs while ensuring reliable services for our community. Proactive infrastructure investments will help the County stay competitive and prepared for future demands.

Operating Initiative	Proposed Initial Task	Proposed Key Performance Indicators	Operating Initiative Owner(s)	Time Horizon
1. Refine roles, structure and missions of a Rockwall Infrastructure Consortium to create a county-wide body to integrate city, county, state, and federal transportation, school development, water conservation, and infrastructure efforts.	FY25 establish the charter and structure of the Infrastructure Consortium, including subcommittees. Continue monthly tracking of Road Bond Initiatives with TXDOT. Reevaluate and update County Throughfare Plan with city overlays. Create county-wide trail map with trail classifications.	# and % of County infrastructure projects completed.		Actionable 0 – 5 Years Completion (FY2025)
2. Using the Open Space Alliance, create a county-wide trail plan that incorporates city efforts with utility providers to leverage existing and future easements and corridors.		% of trails and open spaces adopted. % completion of the master trail plan for County. % of trail miles within the plan completed.		Actionable 0 – 5 Years Completion (FY2025)
3. Develop enhanced storm runoff and flood control strategies, including the maintenance of existing conservation lakes.	FY26 assess the Rockwall watershed and National Resources Conservation Service (NRCS) system and sites. Create a strategy with prioritized list of flood control actions.	% of adopted flood control strategies recommended to Commissioner's Court.		Actionable 0 – 5 Years Completion (FY2025)

Strategic Goal #4: Invest in County-wide Infrastructure

Well-maintained roads, utilities, storm runoff and drainage, and broadband access promote healthy communities and attract business, creating jobs while ensuring reliable services for our community. Proactive infrastructure investments will help the County stay competitive and prepared for future demands.

4. In collaboration with agencies and the County's cities, identify modern practices and technologies to monitor, predict, and manage traffic and transportation patterns.	Identify infrastructure (e.g., intersections) that can be enhanced by more modern technologies. Identify inefficiencies in our transportation models with need for innovation. Engage the Road Consortium.	% of enhanced technology practices implemented by budgeted County departments. % of road bonds executed. % County budget spend vs planned for road and bridge maintenance / repair. % of productivity and effectiveness of existing and new technologies. % of report adopted from efficiency study for County intersections.		Actionable 0 – 5 Years Completion (FY2025)
5. Identify investment mechanisms and funding sources to support County-wide infrastructure development, maintenance and repair costs.	Create a County prioritized list of roadway and infrastructure maintenance and improvement plan. FY25 Create a county level Capital Improvement Plan (CIP). Define apportionment categories and values.	% increase budgeted to support County-wide infrastructure, maintenance and repairs.		Ambitious 5 – 15 Years Completion

Strategic Goal #5: Foster Economic Growth While Preserving and Protecting Local Culture and Traditions

Fostering economic growth while preserving our local culture and traditions ensures sustainable development that strengthens the economy and bolsters Rockwall County's identity. By supporting local businesses, heritage sites, and cultural events, we can attract investment and maintain our unique character.

Operating Initiative	Proposed Initial Task	Proposed Key Performance Indicators	Operating Initiative Owner(s)	Time Horizon
1. Conduct a tourism study to identify ways to use the County's historical assets, cultural programs and recreation industries as key economic drivers.	Conduct a tourism study.	% increase in cultural and recreation programming.		Actionable 0 – 5 Years Completion (FY2025)
2. Establish a County Real Property Development team and a County Economic Development Consortium to design and guide residential and commercial development, aligning with city and state ordinances and regulations. Establish County oversight and management of unincorporated area land uses, including the creation of a desired Future Land Use Map (FLUM) to guide development.	Establish a County Real Property Development team. Establish City-County Economic Development Consortium. Establish categories of allowable land uses and density for the purpose of directing the future development and redevelopment. Define desired land uses to encourage the preservation, protection and to preserve, protect and promote the public health, safety and general welfare of residents and businesses across Rockwall County. Create a desired County Flood and Land Use Management (FLUM) in	% of planned vs un-planned development tracked. Tax base growth. Job growth. Poverty reduction. Unemployment rate. % completion of land use heat map.		Actionable 0 – 5 Years Completion (FY2025)

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	collaboration with the cities (establish common land use definitions wherever possible).			
3. Conduct an impact study including a cost benefit analysis for the creation of a county multi-event/multi-purpose center and/or a state/regional park.	Establish requirements and usage for center. Economic Development Corporation (EDC) to facilitate private sector development of concept. Define park characteristic and planned usage.	% of study completion. % of adoption of feasibility recommendation % of multi-purpose center / park space created.		Actionable 0 – 5 Years Completion (FY2025)
4. Evaluate opportunities for County and/or public-private partnerships to maintain open spaces and increase resident awareness and involvement in conservation efforts including connecting trail systems together across cities.	Establish baseline by conducting an Open Spaces and Trails Public Survey. Establish existing open space baseline.	% of partnerships increased engagement. % of resident awareness from data channel traffic, survey results.		Actionable 0 – 5 Years Completion (FY2025)

Strategic Goal #6: Expand Support for the Judicial System, Law Enforcement, Fire, Emergency, and Public Health Services

Ensuring community safety and well-being is essential to our County. Adequate resources and funding will help our critical services respond effectively to emergencies, uphold justice and protect public health.

Operating Initiative	Proposed Initial Task	Proposed Key Performance Indicators	Operating Initiative Owner(s)	Time Horizon
1. Conduct a detailed study of the Rockwall County Justice System with the appropriate departments and agencies to determine needs, timelines and costs to meet population growth and increased case filings.	Conduct study of justice systems.	Average case processing time. % of residents reporting quality of life enhancement due to measurable impacts of population growth. % of residents maintained due to measurable impacts of population growth. % of increase in each metric based on growth. % change in caseloads.		Actionable 0 – 5 Years Completion (FY2025)
2. Create a plan to address the increase in mental health needs, including enhanced collaboration with veteran groups, first responders, the non-profit community, and partnerships with local, state and federal agencies.	Create a County Public Health Advisory Board.	% of increased meetings, presentations, events regarding mental health with local, state, and federal agencies. % increase in hospitalization rates due to mental health conditions in recent years. Client satisfaction rate (%).		Actionable 0 – 5 Years Completion (FY2025)
3. Regularly assess the state of the Rockwall County law enforcement and judicial system to achieve better cross-agency operational capabilities and efficiencies, meet training and equipment needs, and	Develop a rubric to measure readiness.	% increase of cross law enforcement meetings and collaboration events. % reduction in efficiency metrics.		Actionable 0 – 5 Years Completion (FY2025)

Strategic Goal #6: Expand Support for the Judicial System, Law Enforcement, Fire, Emergency, and Public Health Services

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develop competitive recruitment and retention strategies.		Overtime hours, paper-based processes time-to-completion, report generation, etc.		
		% increase of recruitment and retention.		
4. Review the Emergency Services Corporation charter to expand its responsibilities, facilities, roles and missions to enhance public safety training.	Reassessment of response times.	% change in Advanced Life Support (ALS) / Basic Life Support (BLS) response time.		Ambitious 5 – 15 Years Completion
	Review and revise governance document / interlocal agreements.			
5. Leverage the County Disaster Response Plan to improve readiness and increase community awareness and support.	Readiness of County 911 Center, Rockwall County Emergency Radio System, and 'Nixle.'	Incident resolution rate.		Ambitious 5 – 15 Years Completion
	Create a separate general awareness system for the County.	Resource utilization rates per incident.		
		% increase in Emergency Alerts and Readiness Broadcasts.		
		# of Emergency Broadcasts.		
		% increase in alerts for readiness.		
		# sign-ups for emergency alerts / % increase in sign-ups.		
6. Improve County health and welfare outcomes by enhancing relationships with community non-profits through joint planning efforts and increasing access to resources, services, and information.	Create a County Non-Profit Health and Welfare Alliance.	% of improvement on key community health and welfare statistics.		Actionable 0 – 5 Years Completion (FY2025)
		% increase in accessibility and utilization of resources, services, and information.		

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		% increase in communication with participant agencies compared to prior year.		
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July 31, 2025

City of Rowlett

RFP No. 2025-166-B

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Project timeline

Meeting or beating the City of Rowlett's deadlines

The chart below represents our customized tactics, milestones and deliverables by project stage to provide the strategic plan to the City on time. We'll collaborate closely with you to finalize a client service plan that meets all your needs — especially your timing.

ACTIVITIES	AUG	SEP	OCT	NOV	DEC	JAN
Phase 1 — Define						
1.1 – Project initiation						
1.2 – Gather background information						
1.3 – Develop stakeholder engagement plan						
1.4 – Finalize project scope						
Phase 2 — Discover						
2.1 – Internal stakeholder engagement						
2.2 – Community outreach (optional)						
2.3 – Summary report						
Phase 3 — Develop						
3.1 – Design/facilitate workshop						
3.2 – Develop action plan/KPIs						
3.3 – Final strategic plan						
3.4 – Present strategic plan						
Phase 4 — Deploy						
4.1 – Establish strategic plan teams						
4.2 – Prepare change management plan						
4.3 – Implement training and support						
4.4 – Implement software (optional)						TBD

OUR COMMITMENT TO THE CITY OF ROWLETT

Working closely with you and your team, we will co-develop a timeline to deliver on time or ahead of schedule.

July 31, 2025

City of Rowlett

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Experience and references

Sharing our strategic planning experience

A representative list of clients our firm has provided strategic planning services to over the past few years is included below. This experience providing strategic planning services to numerous public sector clients will translate into a broad perspective and meaningful insights for the City.

- | | | |
|---|---|--|
| <ul style="list-style-type: none">• 5054 Development Group, Texas• Bacon Companies, New York• BSN Sports, Texas• CDS Design + Build, Texas• Chick-fil-A, Georgia• City of Anaheim, California• City of Ankeny, Iowa• City of Burlington, North Carolina• City of Hesperia, California• City of Seal Beach, California• City of Clearwater, Florida• City of Commerce City, Colorado• City of Corvallis, California• City of El Cerrito, California• City of Fate, Texas• City of Folsom, California• City of Fort Wayne Utilities, Indiana• City of Huntington Beach, California• City of La Mesa, California• City of Lake Worth, Texas | <ul style="list-style-type: none">• City of Palm Bay, Florida• City of Pinole, California• City of Pleasanton, California• City of Santa Cruz, California• City of Sheboygan, Wisconsin• City of Suisun City, California• City of Union City, California• City of Vallejo, California• City of Victorville, California• City of Wauwatosa, Wisconsin• City of Wichita Falls, Texas• City of Windsor, California• Delaware County, Pennsylvania• Economic Development Corporation of Lancaster County, Pennsylvania• Fusch Architects, Texas• Green Valley Special Utility District, TX• Guadalupe-Blanco River Authority, Texas• Hatfield & Company, Texas• Michael Joyce Properties, Texas | <ul style="list-style-type: none">• Monterey County, California• NASCAR, Florida• Orange County, California• Parish of Baton Rouge, Louisiana• Richland County, South Carolina• Rock County, Wisconsin• Rockwall County, Texas• Royse City, Texas• San Jacinto River Authority, Texas• Town of Kenneth City, Florida• Town of Northlake, Texas• Triton Construction, New York• Turcotte Development Group, Texas• United States Olympic Committee, Colorado• USA Softball, Oklahoma• Varsity Brands, Texas• Town of Westlake, Texas• Western Association of Schools and Colleges, California• Whaley Communications, Texas |
|---|---|--|

Scheduling and planning for success

A timeline is nothing without people who have the talent, time and knowledge to devote to your goals. Our scheduling and planning strategies prioritize the City's needs and provide a responsive, accessible and consistent team that can complete your project on time and on budget.

We use ProStaff, a dynamic scheduling tool, to make sure the key team members in this proposal are available, your project is properly staffed and we meet your requested deadlines.

Our firm uses these scheduling and planning strategies to make sure we meet your objectives:

 Dedicated teams with clearly defined roles and responsibilities We structure our responsive team to quickly escalate any issues, be available when you need us and meet your needs without overburdening individual team members.	 Staff scheduling tools and resources to deliver high-quality service Our team members enter their availability into ProStaff. Resource management coordinators use weekly reports to make sure team members' commitments do not exceed their capacity to deliver high-quality service.	 Flexible staffing ratios and a high level of principal and manager resources We offer flexible staffing ratios depending on project needs. We balance workloads for team members through advanced planning and integrate additional subject matter specialists and support staff when needed.
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MEETING YOUR DEADLINES AND NEEDS THROUGH AN ORGANIZED SCHEDULING PROCESS
Building the ideal team to achieve the City of Rowlett's goals is just the beginning. Our scheduling tools and processes keep these team members available, on track and achieving your objectives cost-effectively.

Recently completed strategic plan

Located in the appendix, we have provided a completed strategic plan for Rockwall County.

Demonstrating that we've been down this path before

The experiences of our clients speak more about Baker Tilly's capabilities than any proposal ever could. That's why we encourage you to talk with our clients. Here are a few individuals who welcome the opportunity to share their Baker Tilly experience.

Each will give you an authentic perspective as you consider your own needs.

EXPERIENCE AND REFERENCES

ROCKWALL COUNTY, TEXAS			
Name	Dana Macalik	Title	County Commissioner
Phone	+1 (972) 204 6020	Email	dmacalik@rockwallcountytexas.com
Address	101 E Rusk St, Rockwall, TX 75087		
Services	Rockwall County Strategic Plan 2050 was a comprehensive approach to a normal strategic planning process, which involved substantially more data gathering, community engagement and strategic planning workshop sessions to develop a plan for the County's Unity 2050 mission. The final plan spanned 25-year time horizon, as Baker Tilly worked with subconsultant Freese and Nichols, Inc., a Texas based engineering and planning firm, for community engagement assistance. The final plan was the result of thousands of community member inputs, hundreds of hours of steering committee members, including County personnel and volunteer advisors, as well as a robust community steering committee (CSC), which purposefully contained all mayors, County elected officials, and key business and agency stakeholders in the area. The final plan was unanimously approved by all five County Commissioners in April 2025, helping Rockwall County become one of the only high-growth Texas counties with a strategic plan for future growth and planning.		
Cost	\$248,900		
Team	Caitlin Humrickhouse, Khala Stanfield, Woody Battle		

TOWN OF WESTLAKE, TEXAS			
Name	Wade Carroll	Title	Town Manager
Phone	+1 (817) 490 5715	Email	wcarroll@westlaketx.gov
Address	1500 Solana Blvd, Building 7, Suite 7200, Westlake, TX 76262		
Services	Baker Tilly facilitated a strategic planning session with the City Council in November 2024. The objectives identified through this project included providing a comprehensive approach to strategic planning. The Baker Tilly team prepared a long-range fiscal sustainability plan and economic development plan to assist the Town Council in reviewing the vision, mission, and values. Baker Tilly provided two community workshops and numerous interviews with stakeholders and staff. The result was a seven-year strategic plan that highlighted the fiscal and economic opportunities and challenges.		
Cost	\$85,500		
Team	Caitlin Humrickhouse, Woody Battle		

EXPERIENCE AND REFERENCES

GREEN VALLEY SPECIAL UTILITY DISTRICT, TEXAS			
Name	Phillip Gage	Title	General Manager
Phone	+1 (830) 865 6142	Email	pgage@gysud.org
Address	529 S Center St, Marion, TX 78124		
Services	Baker Tilly Advisory Group, LP entered into an engagement agreement with Green Valley Special Utility District (GVSUD) to provide advisory services. The scope of services included assisting GVSUD with strategic planning, specifically focusing on developing a vision, mission, defining the customer base and value proposition, and creating a 5–10-year strategic plan with specific goals, objectives, and strategies. Additionally, Baker Tilly helped create an implementation action plan and change management plan to monitor and evaluate progress toward the plan's goals. The project was executed in four phases using Baker Tilly's D ⁴ (Define, Discover, Develop, Deploy) methodology. The phases included establishing a successful foundation, understanding the current state through stakeholder engagement and environmental scans, preparing the strategic plan through workshops and drafting key documents, and launching the strategic plan implementation. Baker Tilly worked closely with GVSUD's leadership team and other designated staff, ensuring that the strategic plan aligned with the district's needs and objectives.		
Cost	\$73,450		
Team	Caitlin Humrickhouse, Khala Stanfield, Woody Battle		

EXPERIENCE MATTERS. ESPECIALLY THE EXPERIENCE OUR CLIENTS RECEIVE

Connect with our clients to learn more. Additional references are available by request.

Appendix: Sample report



The Rockwall County Strategic Plan 2050



Letter from the Commissioners Court

Beginning in 2023, the Commissioners Court, in collaboration with a dedicated group of county residents, embarked on developing Rockwall County Strategic Plan 2050. This visionary roadmap reflects the priorities and values desired by our community, including maintaining a safe, family-friendly environment by preserving the County's unique character amidst the rapid growth of the North Texas region.

As Rockwall County faces mounting pressures from developers and statewide influences, our commitment to preserving open spaces, historical treasures, and community values has been clearly communicated and become increasingly vital. Through meaningful engagement with citizens, county staff and key stakeholders, we have identified the need to balance progress with the preservation of our distinctive identity. The dedication of our elected officials, government employees, and residents has been instrumental in shaping a strategy that secures a vibrant future without unnecessary government interference.

Rockwall County Strategic Plan 2050 creates clear, actionable goals to guide responsible growth. It emphasizes enhancing governmental transparency, improving communication channels, and fostering unity through collaboration with local governments and representatives in Austin. By addressing critical priorities such as transportation, infrastructure, development, density, economic opportunities, and public safety, we can protect and enhance the quality of life in Rockwall County for generations to come. By uniting under the shared vision of the Rockwall County Strategic Plan 2050, we are laying the foundation for a thriving, sustainable future that honors our community's values and ensures a prosperous, family-friendly environment for all.



Frank New
County Judge



Bobby Gallana
Commissioner
Precinct 1



Dana Macalik
Commissioner
Precinct 2



Lorne Liechty
Commissioner
Precinct 3



John Stacy
Commissioner
Precinct 4

Table of Contents

Introduction	3
Discovering Rockwall County	5
Rockwall County Strategic Plan 2050 Framework	11
Strategic Goals and Operating Initiatives	15
The Future of Rockwall County	22
Acknowledgements	24
References	25

Introduction

From 2023-2025, a group of resolute County elected officials, employees and citizens created Rockwall County Strategic Plan 2050 to preserve our quality of life and establish our community's priorities.

The Purpose of this Strategic Plan is to create a roadmap for the future of Rockwall County to continue as a safe, low density, thriving, family friendly community that is an oasis from the urban sprawl of the North Texas region.

This Purpose incorporates our shared values and goals, to achieve our collective future. This Plan will guide future decision making to achieve the desires of Rockwall County residents.

The Commissioners Court developed this Plan based on a robust set of data including the direction of a Citizen Steering Committee, public and employee surveys, exhaustive search of public records, review of existing plans and many public forums designed to capture diverse perspectives and build countywide consensus. Thousands of hours of public in-person and small group collaboration have been dedicated to this effort.

The County partnered with two strategic planning firms, the Baker Tilly Advisory Group and Freese and Nichols, Inc., to produce a plan that will boldly lead us into the future.



The Plan sets out the course using a multi-year roadmap of aspirational yet achievable goals. The Plan ushers in a new era of cooperation between the County, our cities, and regional governments to achieve our community's vision for the future of our County. The Operating Initiatives are the Plan's backbone that will allow us to achieve strategic outcomes, create a sense of urgency and collaboration, while listening to community voices.

The Plan will:

- Promote responsible and sustainable growth and development while safeguarding against unnecessary government interference.
- Enhance governmental transparency while creating better channels for citizens to communicate with their county government.
- Foster a spirit of collaboration and cooperation among local governments and our representatives in Austin and Washington, D.C.
- Preserve our quality of life by creating high-quality transportation networks, improving critical infrastructure and preserving natural resources and open spaces, while enhancing economic opportunities and sustaining a safe, law-abiding community.

We are excited about this Plan and encourage our current and future community and government leaders to see it to fruition.



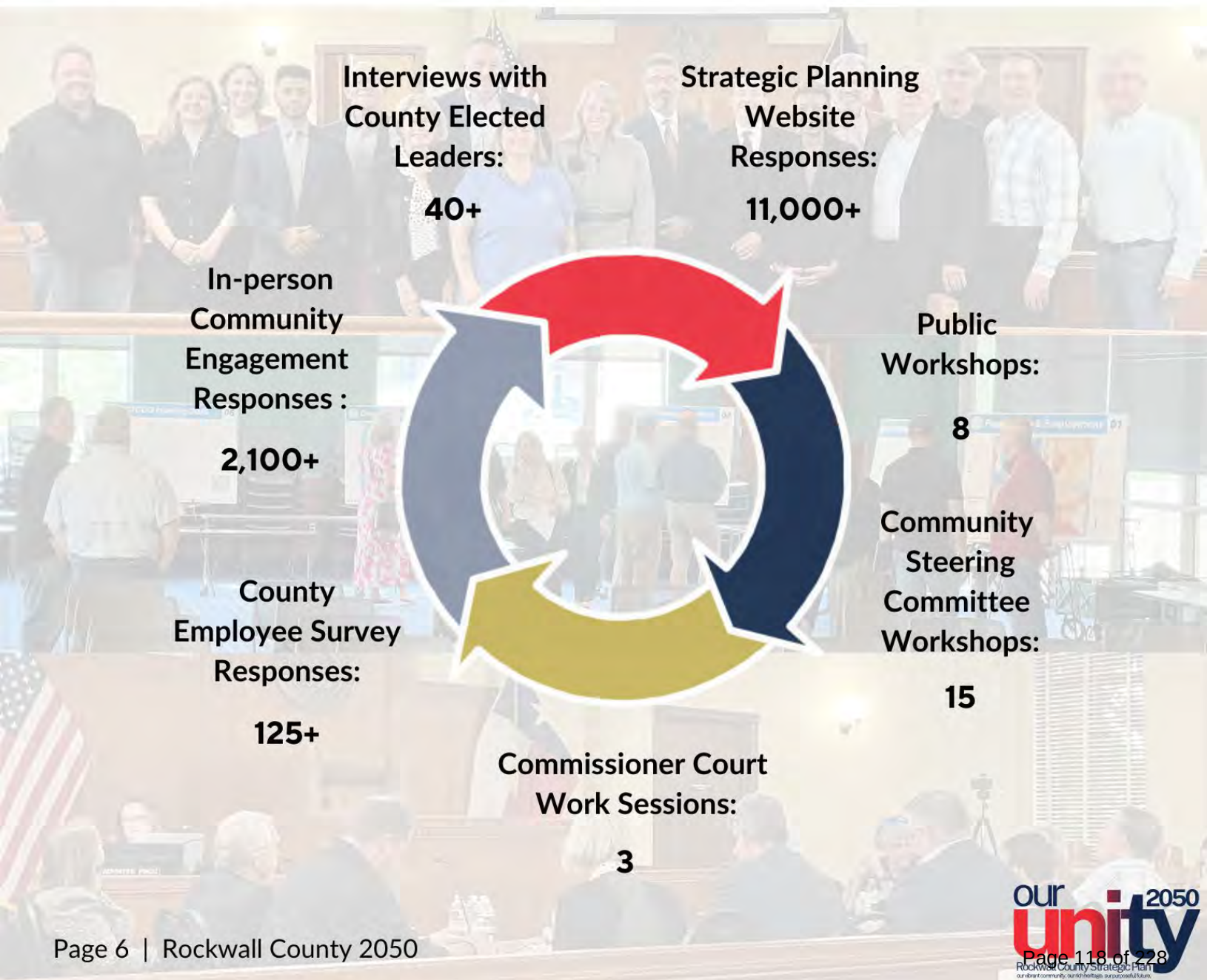
Discovering Rockwall County



Community Engagement

Creating Rockwall County Strategic Plan 2050 brought together inputs from county residents from all walks of life backed by data gathered from interviews, web-based surveys and community workshops to identify robust facts and figures from multiple sources, public comments, county employees, and elected officials culminating in several Commissioner Court work sessions to create the Plan.

Working together, the Citizens Steering Committee and the Commissioners Court crafted Rockwall County Strategic Plan 2050's overarching goals, operating initiatives, and implementation strategies. The Plan is designed to optimize the County's strengths and opportunities while minimizing weaknesses and neutralizing threats to preserve and protect the quality of life for all Rockwall County residents and visitors.



Rockwall County Snapshot

Big enough to matter, small enough to care.

Population:

131,307
(July, 2023)

**Cities
Within the
County:**

10

Average Age:

37.6
Years Old
(2023)

**Rockwall
County Budget:**

\$55.5M
(FY2025)

**Annual
Population
Growth:**

5.1%
(2020-2023)

**County Gross
Domestic Product:**

\$5.173B
(2023)

**Total Land
Area:**

127
Square Miles

Population Density:

1033
People/Per Square Mile
(2023)

**Average
Household:**

3.0
People
(2023)

**Vacant / Undeveloped
Land:**

38%
(FY2025)

**Median Household
Income:**

\$121,303
(2022)

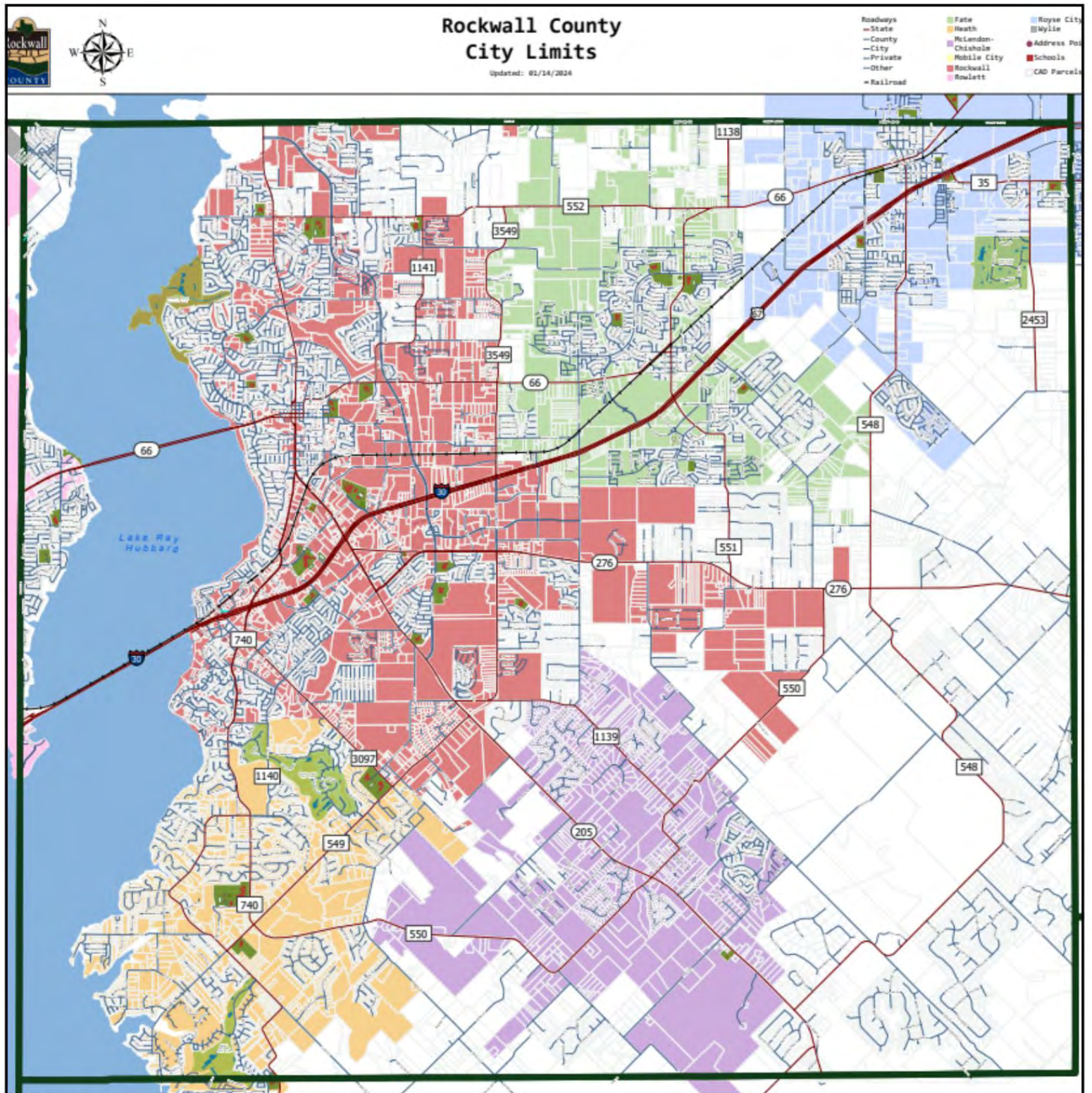
**Median
New Home
Price:**

\$432,327
(2023)

Sources: US Census, North Central Texas Council of Governments, County Government, and Chamber of Commerce

Rockwall County Map

Big enough to matter, small enough to care.

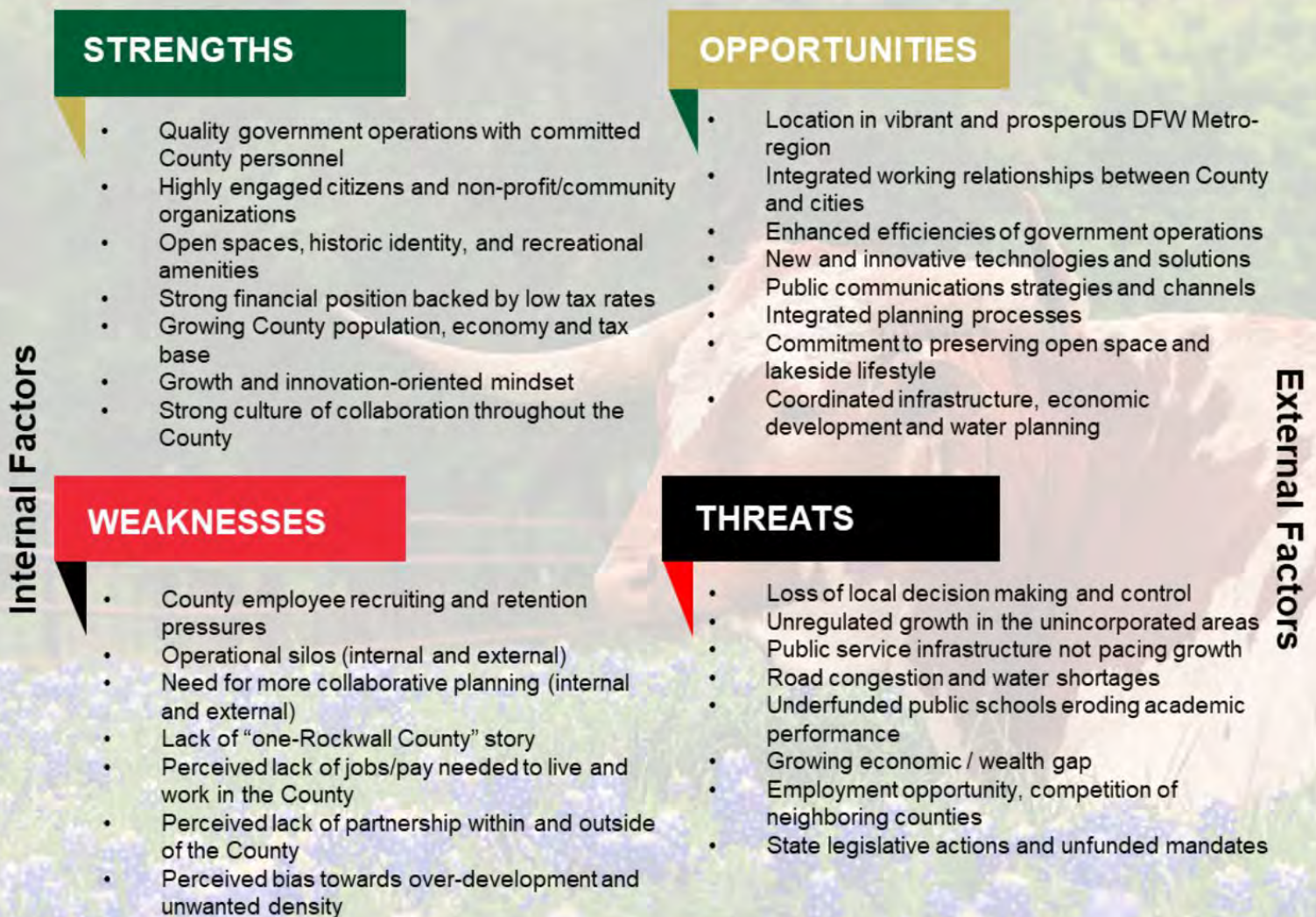


Sources: North Central Texas Council of Governments

Rockwall County Strategic Plan

2050 SWOT Matrix

Based on Rockwall County's strengths, weaknesses, opportunities, and threat analysis (SWOT matrix), it is imperative to follow a logical, well-designed plan to achieve our aspirations over the next 25 years. Population growth, water availability, traffic congestion, infrastructure and development pace, are among key concerns facing the Rockwall County community. However, these also pose opportunities that can be addressed through purposeful strategic goals and initiatives.



Matrix above captures current and future considerations:

Strengths are used to mitigate weaknesses and are leveraged for future opportunities.

Opportunities are used for future strategies.

Weaknesses are turned into opportunities or threats.

Threats are enhanced by weaknesses.

Rockwall County Discovery Themes

Throughout the Plan development, multiple insights about the County stood out as key themes which informed the strategic goals and initiatives.

- Participants emphasized maintaining the Rockwall County “quality of life”, while introducing recommended changes for an enhanced future.
- The County has low tax rates and promotes a business-friendly environment.
- The County must leverage its location in the DFW metropollex and its reputation as a community of choice.
- Lake Ray Hubbard and the lake-life lifestyle has transformed the County, creating destination venues, a thriving tourism and recreational sector, and long-standing history that attracts visitors and keeps residents.
- Balancing preservation of culturally significant spaces with the rapidly growing population and the public’s desire for open spaces may mean acquiring land for preservation, public use and management.
- Unfunded mandates pose a significant challenge for the internal operations of the County.
- Development should consider various needs for housing types, locations, and accessibility. Population / density impacts on demand for services will correspondingly increase over the next 25 years.
- Water conservation and shortages are critical concerns for the region, necessitating technological innovation and strategies.



Rockwall County Strategic Plan 2050 Framework



Plan Framework Elements

Rockwall County Strategic Plan 2050 was created using facts and data captured during the discovery process to baseline the County and then, backed by extensive public engagement including wide-ranging perspectives, captured public input. Hundreds of discussion hours in workshops and on-line surveys created a robust data set consisting of thousands of data points that captured public sentiment. The Plan framework uses five sub-components to evaluate the Discovery Report and define the future of the County.

- **The vision** sets the focus for the future. It is a statement of where the County wants to be.
- **The mission** is a statement of the Purpose of the County. It fundamentally describes what Rockwall County stands for and what it will do.
- **Core values** guide the behaviors of staff in support of the County and are the expectations of how constituents will be treated.
- **Strategic goals** are closely aligned with the vision, mission, and core values and state the desired outcomes to be achieved. These goals provide a strategic focus for what the County will do.
- **Operating initiatives** are specific tasks, projects or action items (new or existing) that are designed to help the County fully achieve each strategic goal.

Our Vision

Creating a place where families flourish by providing a high quality of life that is welcoming, resilient and safe, by incorporating livable and innovative growth, conservation of our open spaces, and effective use of our natural resources and history.

Our Mission

We will work daily to create a uniquely vibrant community that promotes public health and safety, ensures transparency and accountability in governmental actions, supported by an exceptional educational system, thriving business network, and quality County services. We aim to keep our way of life by refusing to lose our unique local character to uncontrolled growth by embracing positive transformation through collaboration and innovation.

Our Core values

Texas Proud -- Promoting a sense of community to preserve our Texas and Rockwall traditions and history while keeping a small-town atmosphere.

Quality of Life -- Nurturing a safe family-friendly environment where everyone has the liberty and opportunity to achieve their full potential.

Collaboration and Transparency -- Working openly and ethically to make decisions that serve the interests of the residents and visitors.

Diversity -- Celebrating diverse cultures and generosity by understanding and embracing differing perspectives and experiences.

Stewardship -- Practicing responsible use of our cultural, financial, and environmental resources now and for future generations.

Innovative Leadership -- Showing an opportunistic mindset, being open to innovative ideas and courageously trailblazing for the betterment of our citizens.

Strategic Goals

Striving towards these goals will ensure the success of Rockwall County in 2050.

GOAL #1

Promote Trust and Transparency in Governmental Operations

GOAL #2

Position the County Government for Growth

GOAL #3

Strengthen Local, Regional, State, and Federal Collaboration

GOAL #4

Invest in County-wide Infrastructure

GOAL #5

Foster Economic Growth While Preserving and Protecting Local Culture and Traditions

GOAL #6

Expand Support for the Judicial System, Law Enforcement, Fire, Emergency, and Public Health Services

Strategic Goals and Operating Initiatives



Strategic Goal #1: Promote Trust and Transparency in Governmental Operations

Trust and transparency are the foundation of effective Rockwall County operations, ensuring accountability and fostering community confidence. Clear communication and ethical decision-making promote more equitable and efficient services, toward which we strive.

Operating Initiatives:

1. Create a County Public Communications Plan to enhance citizen participation and awareness.
2. Adopt a public-facing dashboard that ties the strategic plan to actions and budget.
3. Review and refine the roles and responsibilities of key positions.
4. Create a County Commissioners Court Advisory Council.
5. Create an internal County “Futures Group” focused on trends in innovation, cyber-security and technology for adoption.
6. Find ways to better integrate and expand the roles of existing public committees, and review and engage with outside entities that can provide support for unfulfilled needs.



Strategic Goal #2: Position the County Government for Growth

Preparing for growth is essential to ensure sustainable infrastructure and high quality of life for our residents. Proactive planning will help us manage resources, attract economic development, and anticipate future needs, fostering balanced growth and our community well-being.

Operating Initiatives:

1. Create and implement integrated priority-based planning, programming, budgeting, and execution process.
2. Update and revise the County Facilities Masterplan to evaluate existing facilities, establish future requirements and create a time-phased plan and budget.
3. Conduct a review and plan to forecast capability needs required to accomplish the County's roles and missions under demanding growth scenarios.
4. Conduct a study, and review periodically, to identify best practices for the County's organizational structure, position classifications and total compensation.
5. Review established internal County government working groups to ensure alignment of actions and resources to the strategic plan vision and goals.

Strategic Goal #3:

Strengthen Local, Regional, State, and Federal Collaboration

Strengthening collaboration and partnerships is vital for us to address complex challenges. Effective partnerships will allow necessary expertise, funding, and innovative solutions to meet our County's needs.

Operating Initiatives:

1. Establish Rockwall County legislative priorities integrating appropriate agencies at the local, state and federal level; create legislative strategies to increase the County's and cities' authority over approvals and oversight of Municipal Utility Districts and other Special Purpose Districts.
2. Host "Rockwall 2050 Growth Summits" with county, cities, developers, independent school districts, North Texas Municipal Water District, and other key stakeholders including chambers of commerce and economic development corporations.
3. Create an alliance among the County, cities, school districts and local, state, and federal agencies.
4. Conduct a study to identify compatible land use and growth management guidelines, standards, and cost responsibility burden apportionment within state law.
5. Leverage strong working relationships with the North Central Texas Council of Governments (NCTCOG), North Texas Commission (NTC), Texas Association of Counties (TAC), the Texas Conference of Urban Counties, and others.
6. Increase public awareness of water supply needs and conservation programs and tools.



Strategic Goal #4: Invest in County-wide Infrastructure

Well-maintained roads, utilities, storm runoff and drainage, and broadband access promote healthy communities and attract business, creating jobs while ensuring reliable services for our community. Proactive infrastructure investments will help the County stay competitive and prepared for future demands.

Operating Initiatives:

1. Refine roles, structure and missions of a Rockwall Infrastructure Consortium to create a county-wide body to integrate city, county, state, and federal transportation, school development, water conservation, and infrastructure efforts.
2. Using the Open Space Alliance, create a county-wide trail plan that incorporates city efforts with utility providers to leverage existing and future easements and corridors.
3. Develop enhanced storm runoff and flood control strategies, including the maintenance of existing conservation lakes.
4. In collaboration with agencies and the County's cities, identify modern practices and technologies to monitor, predict, and manage traffic and transportation patterns.
5. Identify investment mechanisms and funding sources to support County-wide infrastructure development, maintenance and repair costs.

Strategic Goal #5:

Foster Economic Growth While Preserving and Protecting Local Culture and Traditions

Fostering economic growth while preserving our local culture and traditions ensures sustainable development that strengthens the economy and bolsters Rockwall County's identity. By supporting local businesses, heritage sites, and cultural events, we can attract investment and maintain our unique character.

Operating Initiatives:

1. Conduct a tourism study to identify ways to use the County's historical assets, cultural programs and recreation industries as key economic drivers.
2. Establish a County Real Property Development team and a County Economic Development Consortium to design and guide residential and commercial development, aligning with city and state ordinances and regulations. Establish County oversight and management of unincorporated area land uses, including the creation of a desired Future Land Use Map (FLUM) to guide development.
3. Conduct an impact study including a cost benefit analysis for the creation of a county multi-event/multi-purpose center and/or a state/regional park.
4. Evaluate opportunities for County and/or public-private partnerships to maintain open spaces and increase resident awareness and involvement in conservation efforts including connecting trail systems together across cities.



Strategic Goal #6: Expand Support for the Judicial System, Law Enforcement, Fire, Emergency, and Public Health Services

Ensuring community safety and well-being is essential to our County. Adequate resources and funding will help our critical services respond effectively to emergencies, uphold justice and protect public health.

Operating Initiatives:

1. Conduct a detailed study of the Rockwall County Justice System with the appropriate departments and agencies to determine needs, timelines and costs to meet population growth and increased case filings.
2. Create a plan to address the increase in mental health needs, including enhanced collaboration with veteran groups, first responders, the non-profit community, and partnerships with local, state and federal agencies.
3. Regularly assess the state of the Rockwall County law enforcement and judicial system to achieve better cross-agency operational capabilities and efficiencies, meet training and equipment needs, and develop competitive recruitment and retention strategies.
4. Review the Emergency Services Corporation charter to expand its responsibilities, facilities, roles and missions to enhance public safety training.
5. Leverage the County Disaster Response Plan to improve readiness and increase community awareness and support.
6. Improve County health and welfare outcomes by enhancing relationships with community non-profits through joint planning efforts and increasing access to resources, services, and information.



The Future of Rockwall County

Achieving Rockwall County Strategic Plan 2050 Vision and Goals

Rockwall County Strategic Plan 2050 serves as a guide for how we must act to shape, influence, and purposefully design a community that provides civic richness for all residents and visitors over the next 25 years. Implementation will require collaboration, collective action, and governmental accountability, from County leadership and local, regional, and state stakeholders, to turn strategic goals into tangible outcomes. Plan goals will be tracked quarterly through the County's internal dashboard linked to budgets and displayed through public-facing access pages. An annual review of goals and initiatives progress, and multi-year updates, will help maintain overall plan focus and relevance.

Rockwall County elected officials are determined to position Rockwall County as a state and regional leader in a forward-thinking government that is committed to preserving our family-friendly culture by adapting to growth while preserving our core values and long-term vision. To ensure this plan and strategy stays relevant and effective, the County will measure progress toward goals quarterly and revisit the plan at least every three-to-five years.

Throughout the planning process, keeping and strengthening local decision-making that guides residential and commercial development was identified by all participants as a key imperative. A key factor for the plan's success will be achieving alignment of our county legislative priorities and dedicated support from our state representatives and local governments. This unified approach will allow Rockwall County to advocate policy changes needed to strengthen local decision making, achieve critical funding and execute infrastructure projects that support shared goals.

As Rockwall County moves forward into the future, bold innovative and collective leadership between public and private organizations is needed to maintain a high quality of life for all our citizens.

Acknowledgements

On behalf of the County Commissioners, and Strategic Planning Leadership Committee, we would like to acknowledge everyone involved from across Rockwall County and the region, including elected officials, County employees and members of our community, with wide-ranging expertise, who participated in the public surveys, data gathering and meetings and made the creation of the Plan possible.

We specifically acknowledge the following members of the Community Steering Committee who dedicated many hours in working meetings to ensure the Plan represents the views of our citizens and steers the focus of the County for years to come.



Andrew Ainsworth
Carl Alsabrook
Jim Barto
David Billings
Eric Bott
Ryan Breckenridge
Karly Brooks
Cyndi Brown
Heather Buegeler
Ashlee Burke
Catherine Casteel
Rick Crowley
Kenda Culpepper
Paul Day
Rich Dean
Sarah DiGirolamo
Joseph DiNuovo
Dave Embry
Bobby Gallana
Terry Garrett
Wade Gent
Lee Gilbert
John Harper
Charisa Hauser
Sharon Henson
Leland Hernandez

Amy Hilton
Cindy Horne
Mayowa Ijagbemi
Trace Johannesen
Meredith Joyce
Ryan Joyce
Clarence Jorif
Mark Kipphut
Michael Kovacs
Jenny Krueger
Tom Kula
Autumn Kuschel
Christina Lee
Lorne Liechty
Chris Lynch
Dana Macalik
Blake Margolis
Christina McClure
Jeremiah McClure
Patrick McDonald
Bryan McNeal
Scott Muckensturm
Frank New
Janet Nichol
Darby Nielsen
Larry Parks

David Peek
Maddie Purk
Michael Purk
Trevor Reed
Lauren Rowe
Mark Russo
Travis Sales
Curtis Schaibly
Debra Shinder
Trey Slinkard
Mary Smith
Shelly Spearman
Susie Stansel
Sheri Starkey-Parks
Christa Stewart
Dalton Tasset
Cindy Tayem
Kevin Walker
Matt Wavering
Ryan Wells
Brent Weaver
Kami Webb
Kerry Wiemokly
Brian Williams
Asa Woodberry
Denise Zackery



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- Implementation Management Planning for The Rockwall County Strategic Plan 2050 - Baker Tilly Advisory Group - February 28th, 2025.
- Discover Phase Summary Report - Rockwall County Strategic Plan 2050 - Baker Tilly Advisory Group - October 8th, 2024.
- Rockwall County Strategic Plan 2050 - Public engagement Results Packet - Freese and Nichols, Inc. - August 1st, 2024.
- Miscellaneous strategic planning presentations, documentation, and preparatory materials (phases 1 - 4) - Baker Tilly Advisory Group - February 1st, 2024 - March 1st 2025.

Big enough to matter, small enough to care.

our unity²⁰⁵⁰

Rockwall County Strategic Plan

our vibrant community. our rich heritage. our purposeful future.



July 31, 2025

City of Rowlett

RFP No. 2025-166-B

Proposal for strategic planning services

SECTION H

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Fee schedule

Sharing our transparent fee estimate

The City's fee estimate is based on what we've learned is important to you. We'll go beyond what's expected to deliver a return on your investment.

SERVICES FOR THE CITY OF ROWLETT	FEES
Define	\$12,100
Discover	\$21,000
Develop	\$16,550
Deploy	\$9,250
Travel and expenses	\$8,600
TOTAL FOR ALL SERVICES	\$67,500

OUR TRANSPARENT, FAIR FEE ESTIMATE

The City of Rowlett can expect a competitive fee arrangement and continuous value.

No unnecessary charges

You won't see add-on charges for routine calls, emails or quick consultations. They're included in our fees because we're here to earn your trust. If your need is out of scope, we'll never perform additional work unless you give us the go-ahead. Our final billing will always be based on the value we deliver to you.

Key assumptions

We based our fee estimate on your needs. If any of the assumptions below change, we'll share any new requirements, budgetary considerations and options.

- Adequate support, preparedness, cooperation and feedback from management
- Fees based on current standards
- No major changes in scope or organizational structure, including mergers or expansions
- Organized books and records



CERTIFICATE OF LIABILITY INSURANCE

DATE(MM/DD/YYYY)
01/03/2025

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 rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Aon Risk Services Northeast, Inc. New York NY Office One Liberty Plaza 165 Broadway, Suite 3201 New York NY 10006 USA	CONTACT NAME:	
	PHONE (A/C. No. Ext): (312) 381-1000	FAX (A/C. No.): (312) 381-7007
INSURED Baker Tilly US, LLP & Baker Tilly Advisory Group, LP P.O. Box 7398 4807 Innovate Lane Madison WI 53707-7398 USA	E-MAIL ADDRESS:	
	INSURER(S) AFFORDING COVERAGE	
	NAIC #	
	INSURER A: National Fire Ins. Co. of Hartford	20478
	INSURER B: The Continental Insurance Company	35289
	INSURER C: American Casualty Co. of Reading PA	20427
INSURER D: Transportation Insurance Co.	20494	
INSURER E:		
INSURER F:		

COVERAGES	CERTIFICATE NUMBER: 570110349768	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.		
Limits shown are as requested		

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☐ POLICY ☐ PRO-JECT ☒ LOC ☐ OTHER:			C6016751638 General Liability	01/01/2025	01/01/2026	EACH OCCURRENCE \$1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$1,000,000 MED EXP (Any one person) \$5,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COMP/OP AGG \$2,000,000
A	☐ ANY AUTO ☐ OWNED AUTOS ONLY ☒ HIRED AUTOS ONLY ☐ SCHEDULED AUTOS ☒ NON-OWNED AUTOS ONLY			BUA 6016751641 Auto	01/01/2025	01/01/2026	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)
B	☒ UMBRELLA LIAB ☒ OCCUR ☐ EXCESS LIAB ☐ CLAIMS-MADE ☐ DED ☐ RETENTION			CUE6016723001 Umbrella	01/01/2025	01/01/2026	EACH OCCURRENCE \$2,000,000 AGGREGATE \$2,000,000
C C D	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR / PARTNER / EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	☒ Y ☐ N	N/A	WC6016751624-AOS WC6023746823-CA WC6043413436-WI Workers Compensation	01/01/2025 01/01/2025 01/01/2025	01/01/2026 01/01/2026 01/01/2026	☒ PER STATUTE ☐ OTH-ER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE-EA EMPLOYEE \$1,000,000 E.L. DISEASE-POLICY LIMIT \$1,000,000

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

CERTIFICATE HOLDER**CANCELLATION**

Evidence of Insurance	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 <i>Aon Risk Services Northeast, Inc.</i>



CERTIFICATE OF LIABILITY INSURANCE

DATE(MM/DD/YYYY)
10/01/2024

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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 rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Aon Risk Services Northeast, Inc. One Liberty Plaza, 165 Broadway, Suite 3201 New York, N.Y. 10006	CONTACT NAME:		
	PHONE (A/C. No. Ext): 312-381-1000	FAX (A/C. No) 312-381-7007	
	E-MAIL ADDRESS:		
	INSURER(S) AFFORDING COVERAGE		
INSURED Baker Tilly US, LLP & Baker Tilly Advisory Group, LP P.O. Box 7398 4807 Innovate Lane Madison WI 53707-7398 USA	INSURER A: Columbia Casualty Company		NAIC #
	INSURER B:		
	INSURER C:		
	INSURER D:		
	INSURER E:		
	INSURER F:		

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.

Limits shown are as requested

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY						EACH OCCURRENCE
	☐ CLAIMS-MADE ☐ OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)
							MED EXP (Any one person)
							PERSONAL & ADV INJURY
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE
	☐ POLICY ☐ PROJECT ☐ LOC						PRODUCTS - COMP/OP AGG
	OTHER:						
	AUTOMOBILE LIABILITY						COMBINED SINGLE LIMIT (Ea accident)
	☐ ANY AUTO						BODILY INJURY (Per person)
	☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS						BODILY INJURY (Per accident)
	☐ HIRED AUTOS ONLY ☐ NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)
	☐ UMBRELLA LIAB ☐ OCCUR						EACH OCCURRENCE
	☐ EXCESS LIAB ☐ CLAIMS-MADE						AGGREGATE
	☐ DED ☐ RETENTION						
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY						☐ PER STATUTE ☐ OTHER
	ANY PROPRIETOR / PARTNER / EXECUTIVE OFFICER/MEMBER EXCLUDED? ☐ Y ☐ N						E.L. EACH ACCIDENT
	(Mandatory in NH) ☐ N/A						E.L. DISEASE-EA EMPLOYEE
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE-POLICY LIMIT
A	Professional Liability Insurance			ABF-188122608	01-Oct-24	01-Oct-25	Not less than US \$2,000,000 per claim and in the annual aggregate.

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

CERTIFICATE HOLDER

CANCELLATION

Baker Tilly US, LLP & Baker Tilly Advisory Group, LP P.O. Box 7398 4807 Innovate Lane Madison WI 53707-7398 USA	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 <i>Aon Risk Services Northeast, Inc.</i>
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CERTIFICATE OF LIABILITY INSURANCE

DATE(MM/DD/YYYY)
06/05/2025

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 rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Aon Risk Services Northeast, Inc. New York NY Office One Liberty Plaza 165 Broadway, Suite 3201 New York NY 10006 USA	CONTACT NAME:	
	PHONE (A/C. No. Ext): (312) 381-1000	FAX (A/C. No.): (312) 381-7007
INSURED Baker Tilly US, LLP & Baker Tilly Advisory Group, LP P.O. Box 7398 4807 Innovate Lane Madison WI 53707-7398 USA	E-MAIL ADDRESS:	
	INSURER(S) AFFORDING COVERAGE	
	NAIC #	
	INSURER A: Lloyd's Syndicate No. 1686	
	INSURER B:	
	INSURER C:	
	INSURER D:	
INSURER E:		
INSURER F:		

Holder Identifier :

COVERAGES**CERTIFICATE NUMBER:** 570106103396**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.

Limits shown are as requested

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY						EACH OCCURRENCE
	☐ CLAIMS-MADE ☐ OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)
							MED EXP (Any one person)
							PERSONAL & ADV INJURY
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE
	☐ POLICY ☐ PRO-JECT ☐ LOC						PRODUCTS - COMP/OP AGG
	OTHER:						
	AUTOMOBILE LIABILITY						COMBINED SINGLE LIMIT (Ea accident)
	☐ ANY AUTO						BODILY INJURY (Per person)
	☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS ☐ NON-OWNED AUTOS ONLY						BODILY INJURY (Per accident)
							PROPERTY DAMAGE (Per accident)
	UMBRELLA LIAB ☐ OCCUR						EACH OCCURRENCE
	EXCESS LIAB ☐ CLAIMS-MADE						AGGREGATE
	☐ DED ☐ RETENTION						
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY						☐ PER STATUTE ☐ OTH-ER
	ANY PROPRIETOR / PARTNER / EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	☐ Y ☐ N	N / A				E.L. EACH ACCIDENT
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE-EA EMPLOYEE
							E.L. DISEASE-POLICY LIMIT
A	Cyber Liability			PSACZ2400011 Network&Privacy Liability	06/01/2025	06/01/2026	Limit
							\$5,000,000

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

CERTIFICATE HOLDER**CANCELLATION**

Evidence of Insurance	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 <i>Aon Risk Services Northeast, Inc.</i>

Certificate No : 570106103396

City of Rowlett
RFP No. 2025-166-B
Strategic Planning Services



Important Dates

Pre-Proposal Meeting:	July 23, 2025 at 10:00 A.M.
Questions Deadline:	July 24, 2025 at 12:00 P.M.
Proposals Due:	July 31, 2025 at 2:00 P.M.



STANDARD TERMS AND CONDITIONS FOR PROCUREMENTS

Revised February 12, 2025

1. APPLICABILITY: These standard terms and conditions apply to all goods or services procured by the City of Rowlett, Texas ("City"), unless otherwise stated in the specifications. The instructions contained herein shall be incorporated into the request for bids/proposals or other procurement opportunity advertisement as well as any subsequent purchase order(s) issued for goods or services and shall be included as part of the specifications issued herewith.
2. NOTIFICATION: The City advertises formal procurement opportunities through www.rowlettx.gov, bidnet direct by SOVRA, and *The Dallas Morning News*. The City shall not be responsible for information distributed by sources other than those listed.
3. ADDENDA: Any revisions to the information contained herein or in the request for bids/proposals will be issued in the form of one or more addenda. The sole issuing authority shall be vested in the City of Rowlett Purchasing Office. If addenda containing material changes to the specifications or pricing form are issued, the vendor shall acknowledge receipt of such addenda in the designated section in the Bid/Proposal document. It is the responsibility of the bidder/proposer to obtain and acknowledge any and all addenda. Failure to acknowledge receipt of any addenda may be cause to deem such submission non-responsive.
4. SILENCE OF SPECIFICATION: The apparent silence of the provided specifications as to any detail or the apparent omission from these specifications of a detailed description concerning any point, shall be regarded as meaning that only the best commercial practices are to prevail. All interpretations of the specifications shall be made on the basis of this statement.
5. MINOR DEFECT: The City reserves the right to waive any minor defect, irregularity, or informality in any bid/proposal. Minor defects, irregularities or informalities will not affect the end product/performance intended by the specifications. The City also reserves the right to reject any or all bids/proposals with or without cause prior to award.
6. ELECTRONIC SUBMISSIONS: The City utilizes bidnet direct by SOVRA to advertise and receive bids and proposals electronically over the Internet. Electronic submissions through bidnet direct by SOVRA shall be electronically signed and dated by a duly designated representative or agent of the company submitting the bid/proposal and submitted prior to the stated deadline date and time. Vendors should clearly and concisely provide all requested information as stated in the bid/proposal document. Failure to provide the requested information may be reason to deem such submission non-responsive.
7. PAPER SUBMISSIONS: Paper submissions shall be submitted on the forms provided by the City and must be signed and dated by a duly designated representative or agent of the company submitting the bid/proposal. Vendors shall clearly and concisely provide all requested information as stated in the bid/proposal document. Failure to provide the requested information may be reason to deem such submission non-responsive.
8. PRESENTATION OF BIDS/PROPOSALS: Paper submissions shall be presented to City Action Center, 4000 Main Street, Rowlett, Texas 75088, prior to the stated deadline date and time. Paper submissions shall be presented in a sealed envelope with vendor's name and the bid/proposal number clearly identified on the outside of the envelope.

9. LATE SUBMISSIONS: The date/time stamp located in the City Action Center serves as the official time clock. Submissions received after the stated deadline date and time shall be refused and returned unopened. The City is not responsible for issues encountered with methods of delivery.

10. PRICING: Prices offered shall be submitted for units of quantity as specified in the bid/proposal document, extended and totaled. In the case of a discrepancy in the extended price, the unit price shall govern and control. Any alteration, strike-through or erasure of a unit price or extended price made prior to bid/proposal opening shall be initialed by the signer of the bid/proposal, guaranteeing authenticity.

Prices offered cannot be altered or amended after the submission deadline. Bids may not be changed for the purpose of correcting an error in bid price after bid opening.

11. PROPRIETARY INFORMATION: All material submitted to the City is subject to public disclosure upon receipt, pursuant to the Texas Open Records Act. If vendor does not desire proprietary information in the bid to be disclosed, each page must be identified and marked proprietary at the time of submittal. The City will, to the extent allowed by law, endeavor to protect such information from disclosure. The final decision as to what information must be disclosed, however, lies with the Texas Attorney General. Failure to identify proprietary information will result in all unmarked sections being deemed non-proprietary upon public request.

12. TAXES: The City is exempt from paying federal excise and transportation taxes and Texas State or local sales and use taxes. Tax shall not be included in prices offered. A Tax Exempt Form will be provided by the City upon request. A request for a Tax Exempt Form can be submitted in writing to purchasing@rowlett.com or by contacting the Purchasing Office at 972.412.6189.

13. WITHDRAWAL OF OFFER: Vendor agrees that an offer may not be withdrawn or cancelled for a period of ninety (90) days following the date and time designated for the receipt of the bid/proposal without written approval of the Purchasing Manager.

14. F.O.B./DAMAGE: Prices offered shall be F.O.B. Final Destination, Rowlett, Texas, and shall be all inclusive of shipping, handling and packaging costs. The City accepts and assumes no liability for goods delivered in damaged or unacceptable condition. The successful vendor shall be responsible for handling all claims with carriers, and in case of damaged or unacceptable goods, shall ship replacement goods immediately upon notification by the City.

15. PREPARATION COST: All costs associated with the preparation of an offer, bid, or proposal shall be borne by the vendor. The City will not be liable for any costs associated with the preparation, transmittal, or presentation of submissions, or with any materials submitted in response to the request for bid/proposal.

16. TESTING: At the City's discretion, testing may be required prior to award of the bid/proposal or prior to delivery of goods or services. Testing shall be performed without expense to the City.

17. SAMPLES: At the City's discretion, samples may be required prior to award of the bid/proposal or prior to delivery of goods or services. Samples shall be provided at no cost to the City. Samples should not be enclosed with submission unless specifically requested.

18. QUALITY: Any catalog, brand names, or manufacturer's reference in the bid/proposal packet is merely descriptive and not restrictive and is intended to indicate the type and minimum quality level desired for comparison purposes, unless otherwise stated herein to the contrary. All products and/or optional equipment offered shall be new and of current manufacture. No items of a demonstrator, leased, reconditioned, rebuilt, repossessed or used nature shall be considered, unless otherwise specifically stated herein.

19. BID/PROPOSAL OPENINGS: All bids/proposals will be read aloud at the City's scheduled opening for the designated bid/proposal. However, the reading of an offer shall not be construed as a comment on the responsiveness of such offer, or as any indication that the City accepts such offer as responsive. Neither shall such reading be construed as a comment on the responsibility of the bidder/proposer.

The City will make a determination regarding the responsiveness of offers submitted based upon compliance with all applicable laws and the City's purchasing guidelines and project documents including, but not necessarily limited to, the bid/proposal specifications and contract documents. The City will notify the successful vendor upon award of the contract; and, according to State law all offers received will be available for inspection after award.

For processes other than low bid or best value bid, only the names of vendors will be read aloud at the scheduled opening. Pricing information will not be released until after award of the contract.

20. SUMMARY SHEET: Bid/Proposal summary results are typically published within two (2) business days after the scheduled opening. Interested parties desiring a copy of a bid/proposal summary sheet may request the same by submitting a written request to purchasing@rowlett.com. RESULTS WILL NOT BE RELAYED OVER THE TELEPHONE.
21. GRATUITIES: Gratuities in the form of entertainment, gifts, or otherwise offered or given by the vendor, or any agent or representative of the vendor, to any officer or employee of the City with a view toward securing a contract or securing favorable treatment with respect to the awarding or amending or the making or any determinations with respect to the performing of such a contract, are not permissible. In the event this contract is cancelled by City pursuant to this provision, City shall be entitled, in addition to any other rights and remedies, to recover or withhold the amount of the cost incurred by vendor in providing such gratuities.
22. ANTI-COLLUSION: In submitting an offer, vendor certifies that they have not participated in nor have they been party to any collusion, price fixing or any other illegal or unethical agreements with any company, firm or person concerning the pricing offered.
23. NO PROHIBITED INTEREST: Vendor acknowledges awareness of the laws, City Charter, and City Code of Ethics regarding conflicts of interest. No officer, employee or agent of the City shall participate in the negotiation, selection, discussion, award or administration of a contract or procurement supported by public funds if: 1) that individual has a substantial interest in a person or entity, as defined by Section 2-463 of the City's Code of Ordinances and/or Chapter 171 of the Texas Local Government Code, that is the subject of the contract or procurement; or 2) a conflict of interest, either real or apparent, would be involved, as defined therein.
24. CONFLICT OF INTEREST: In accordance with Chapter 176, Local Government Code, a person who is a vendor and has a business relationship, as those terms are defined by Section 176.001(1-a), with the City and meets requirements under Section 176.006(a) is required to file a Conflict of Interest Questionnaire with the City Secretary not later than the 7th business day after the date the person becomes aware of facts that require the statement to be filed. See Section 176.006, Local Government Code. A person commits an offense if the person knowingly violates Section 176.006, Local Government Code. An offense under this section is a Class C misdemeanor.

A complete copy of Chapter 176 of the Local Government Code may be found at <https://statutes.capitol.texas.gov/Docs/LG/htm/LG.176.htm>.

25. NON-RESIDENT BIDDERS: Texas Government Code, Chapter 2252: Non-Resident Bidders. Texas law prohibits city and governmental units from awarding contracts to a non-resident bidder/proposer unless the

amount of such bid is lower than the lowest bid by a Texas resident by the amount a Texas resident would be required to underbid the non-resident bidder/proposer on a bid/proposal for goods and services in the non-resident bidder's state.

26. DELINQUENT TAXES: Any person, firm, or corporation that is in arrears to the City for delinquent taxes or otherwise, will not be recommended for award of any bid/proposal until the arrearage has been cleared in writing. If a contractor or vendor becomes delinquent while a contract is in force, payment for goods or services provided to the City under said contract or purchase order may be withheld until the arrearage has been cleared in writing.
27. MINIMUM STANDARDS FOR RESPONSIBILITY: A prospective vendor must affirmatively demonstrate responsibility. The City of Rowlett may request representation and other information sufficient to determine vendor's ability to meet the minimum standards including but not limited to:
 - A. Have adequate financial resources, or the ability to obtain such resources as required
 - B. Ability to comply with the required or proposed delivery schedule
 - C. Have a satisfactory record of performance
 - D. Have a satisfactory record of integrity and ethics
 - E. Be otherwise qualified and eligible to receive an award
28. AWARD OF CONTRACT: The City reserves the right to award single or multiple contracts for the goods or services as stated herein, or to reject any and all bids. Furthermore, the City reserves the right to take administration costs into consideration when awarding to multiple vendors.

The City may award bids/proposals to the lowest responsive responsible vendor(s), or to the vendor(s) who provides goods or services at the best value to the City. If using the best value method, the selection criteria will be clearly identified in the bid/proposal document. The best value method may take into consideration, in whole or in part, by way of illustration and not limitation, the following criteria:

 - A. The purchase price
 - B. The reputation of the vendor and of the vendor's goods or services
 - C. The quality of the vendor's goods or services
 - D. The extent to which the goods or services meet the City's needs
 - E. The vendor's past relationship with the City
 - F. The total long-term cost to the City to acquire the vendor's goods or services
 - G. Any relevant criteria specifically listed herein
29. ACCEPTANCE: Vendor agrees that acceptance of any or all items by the City within a reasonable period of time, not to exceed one hundred twenty (120) days following the date and time designated for the receipt of the bid/proposal, shall be binding upon vendor. Vendor shall thereafter execute all documents necessary to enter into a contract in a form acceptable to and properly executed by the City to provide such goods and services.
30. CONTRACT PERIOD: Unless otherwise stated in the specifications contained herein, the contract period for this bid/proposal will be for one (1) year upon City approval, with four (4) optional one-year renewal periods at the option of the City. All contract periods, including all renewal periods, will be subject to the City's availability of funds.
31. FUNDING: The City is a home-rule municipal corporation operated and funded on a fiscal year basis from October 1 to September 30. Accordingly, the City reserves the right to terminate at any time, without liability to the City, any contract for which funding is not available in a subsequent fiscal year.

32. ASSIGNMENT: The successful vendor shall not sell, assign, transfer or convey any contract, in whole or in part, to any other person or party without the prior written consent of the City obtained through the City's Purchasing Office.
33. INTERLOCAL AGREEMENT: The successful vendor agrees to extend prices for goods and services under the same terms and conditions of this bid/proposal to all governmental entities that have entered into, or may hereafter enter into, interlocal cooperative purchasing agreements with the City
34. CHANGE ORDER: The City reserves the right to modify or change plans and specifications as deemed necessary at any time, including after the performance of the contract has commenced, to decrease or increase the quantity of work to be performed, materials, equipment or supplies to be furnished, or address other provisions of the contract as approved by the City Manager or City Council, and as appropriate under state law. No oral statement of any person shall modify or otherwise change, or affect the terms, conditions or specifications stated in the contract. All change orders or modifications to the contract shall be documented in written form by the City and acknowledged by the contracted vendor. All change orders and modifications to the contract shall be processed through the Purchasing Office only.
35. DELIVERY PROMISE – PENALTIES: Where indicated, vendors must provide the number of calendar days required to deliver goods or services to the City after receipt of order (ARO). Do not quote shipping dates. When a delivery delay can be foreseen, the vendor shall provide advance notice to the Purchasing Manager, who shall have the right to extend the delivery date if the reasons for delay are acceptable. Default in promised delivery, without acceptable reason(s), or failure to meet specifications as contained herein or in the contract documents, authorizes the Purchasing Office to purchase goods or services from an alternate source. The defaulting vendor may be subject to re-procurement costs.
36. DELIVERY TIMES: Unless otherwise specified herein, deliveries will only be accepted during normal working hours at the designated City location(s).
37. INSPECTION: Upon receipt of goods or services, the same will be inspected for compliance with the specifications contained herein or in the contract documents. If the goods or services do not pass inspection, the vendor will be required to remedy the situation at the vendor's sole expense. The vendor will be required to retrieve the rejected goods at the delivery point and provide the necessary repairs of or replacement and return of the goods in new condition to the original point of delivery; or re-perform services in accordance with the terms and conditions of the contract and to the City's satisfaction.
38. INVOICES: Invoices shall be submitted to the attention of the ordering department, P.O. Box 99, Rowlett, Texas 75088, or electronically to the appropriate department representative.
39. PAYMENT TERMS: Payment terms are net 30 days, unless otherwise specified by the City in the bid/proposal document.
40. AUDIT: The City shall have access to, and the right to examine, monitor and audit all records, documents, conditions and activities related to [the payment and invoice matters under](#) contracts awarded by the City. It shall be the responsibility of the vendor to maintain records associated with this procurement for a period of three (3) years after completion of the contract, or in the event of litigation, a claim or audit, the records shall be retained until the resolution of such litigation, claim or audit.
41. INSURANCE: The City requires vendor(s) to carry the minimum insurance as required by the greater of the requirements contained in state laws or the insurance requirements contained in the contract documents.

42. PRICE ESCALATION: Unless otherwise stated in the specifications herein, prices must remain firm for the initial term and any renewal terms of the contract, except that the contracted vendor may request an adjustment at the time of contract renewal by submitting a request in written form to the Purchasing Manager. Basis for price escalation should be based on the Consumer Price Index for the most recent twelve-month period reported for the Dallas-Fort Worth area. The contracted vendor shall provide the City with copies of the appropriate indices for verification purposes. The City reserves the right to approve or reject any and all requests for price escalations.
43. PRICE REDUCTION: If during the life of the contract, the contracted vendor's net prices to other customers for the same goods or services are lower than the City's contracted prices, an equitable adjustment shall be made in the contract price in favor of the City.

44. INDEMNITY: The bidder shall defend, indemnify and hold the City, its current, former and future officers, agents and employees harmless from ~~third party any and all costs, expenses, suits, demands, claims, liabilities, liens, encumbrances or damages, including attorneys' fees and costs of suit, of any character, name and description, that are finally determined to be incurred or resulting from any injuries or damages received or sustained by any person, persons or property on account of any the direct result of~~ intentional wrongful conduct or ~~fraudulent negligent act or~~ omission, ~~or fault~~ of the successful bidder, or of any agent, employee, subcontractor or supplier for which the successful bidder is responsible in the execution of, or performance under, any contract which may result from bid award and the bidder so agrees upon the submission of the bid. The bidder shall deliver, if so requested by the City, a written release of all liens or other proper evidence of same, to the satisfaction of the City prior to the issuance of final payment by the City.

The liability (including attorney's fees and all other costs) of Vendor and its present or former partners, principals, agents or employees related to any claim for damages relating to the services performed under this Contract shall not exceed the fees paid to Vendor for the portion of the work to which the claim relates, except to the extent finally determined to have resulted from the willful misconduct or fraudulent behavior of Vendor relating to such services. This limitation of liability is intended to apply to the full extent allowed by law, regardless of the grounds or nature of any claim asserted, including the negligence of either party. Additionally, in no event shall either party be liable for any lost profits, lost business opportunity, lost data, consequential, special, incidental, exemplary or punitive damages, delays, interruptions, or viruses arising out of or related to this Contract even if the other party has been advised of the possibility of such damages.

44.

45. INDEMNITY; PATENT RIGHTS: The bidder/proposer agrees to indemnify and hold harmless the City from any claim involving patent right infringement or copyright infringement on goods or services supplied to the City pursuant to the contract documents.
46. PROTESTS: All protests regarding the solicitation process must be submitted in written form to the Purchasing Manager within five (5) working days following the opening of bids/proposals. This includes all protests relating to legal advertisements, deadlines, bid/proposal openings, and all other related procedures under the Local Government Code, as well as any protests relating to alleged improprieties or ambiguities in the specifications contained herein or in the contract documents.

Post-award protests must be submitted in written form to the Purchasing Manager within five (5) working days after award.

The protest must include, at a minimum, the name of the protester, bid/proposal number or description of goods or services, and a statement of the grounds for the protest. The Purchasing Manager, having authority to make the final determination, will respond within ten (10) working days to each substantive issue raised in the protest. Allowances for reconsiderations shall be made only if data becomes available that was not previously known, or if there has been an error of law or regulation.

47. TERMINATION FOR DEFAULT: The City reserves the right to enforce the performance of the contract in any manner prescribed by law and deemed to be in the best interest of the City in the event of breach or default of the contract. The City reserves the right to terminate the contract immediately in the event the contracted vendor fails to meet delivery schedules or otherwise perform in accordance with the specifications contained herein or in the contract documents. Breach of contract or default authorizes the City to award the contract to another vendor, or purchase from an alternate source, and charge the full increase in cost plus any additional administrative costs incurred by the City to the defaulting contracted vendor.
48. REMEDIES: The successful vendor and the City agree that each party may have rights, duties, and remedies available as stated in the Uniform Commercial Code and any other available remedy, whether in law or equity.
49. VENUE: The validity of the contract and of any of its terms or provisions, as well as the rights and duties thereunder or under the contract documents, shall be governed by and construed in accordance with the laws of the State of Texas. Exclusive venue for any legal action shall lie in the state courts of Dallas County, Texas.
50. ENERGY BOYCOTT: In accordance with Chapter 2274, Texas Government Code (Acts 2021, 87th Leg., S.B. 13), the City may not enter into a contract with a company, excluding a sole proprietorship, with 10 or more full-time employees for goods or services valued at \$100,000 or more unless the contract contains a written verification from the company that the company: (1) does not boycott energy companies; and (2) will not boycott energy companies during the term of the contract. The signatory executing the Contract on behalf of Seller verifies Seller does not boycott energy companies and will not boycott energy companies during the term of the Contract. The foregoing verification is made solely to comply with Section 2274.002, Texas Government Code, and does not apply if the City determines the requirements of Subsection 2274.002(b) are inconsistent with the City's constitutional or statutory duties related to the issuance, incurrence or management of debt obligations or the deposit, custody, management, borrowing or investment of funds.
51. FIREARMS: In accordance with Chapter 2274, Texas Government Code (Acts 2021, 87th Leg., S.B. 19) the City may not enter into a contract with a company, excluding a sole proprietorship, with 10 or more full-time employees for goods or services valued at \$100,000 or more unless the contract contains a written verification from the company that the company: (1) does not have a practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association; and (2) will not discriminate during the term of the contract against a firearm entity or firearm trade association. The signatory executing the Contract on behalf of Seller verifies Seller does not have a practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association and will not discriminate during the term of the contract against a firearm entity or firearm trade association. The foregoing verification is made solely to comply with Section 2274.002, Texas Government Code, and does not apply if the City contracts with a sole-source provider or if the City does not receive any bids, if applicable, from a company that is able to provide the required verification.
52. CRITICAL INFRASTRUCTURE: In accordance with Chapter 2274, Texas Government Code, the City may not enter into a contract or agreement with a company, excluding a sole proprietorship, with 10 or more full-time employees for goods or services valued at \$100,000 or more (1) if the company would be granted direct or remote access to or control of critical infrastructure in Texas, excluding access specifically allowed by the City for product warranty and support purposes and (2) if the City knows the company is (A) owned by or the a majority of stock or other ownership interest of the company is held or controlled by (i) individuals who are citizens of China, Iran, North Korea, Russia, or a designated country or (ii) a company or other entity, including a governmental entity, that is owned or controlled by citizens of or is directly controlled by the government of such countries, or (B) headquartered in such countries. The signatory executing the Contract on behalf of Seller represents that neither Seller nor any of its parent companies, wholly owned subsidiaries, majority-owned subsidiaries, and other affiliates is a company of which the City may not contract pursuant to Section 2274.0102, Texas Government Code. The foregoing verification is made solely to comply with Section 2274.0102, Texas Government Code.
53. ANTI-BOYCOTT ISRAEL VERIFICATION: In accordance with Chapter 2271, Texas Government Code, the City may not enter into a contract with a company, excluding a sole proprietorship, with 10 or more full-time

employees for goods or services valued at \$100,000 or more unless the contract contains a written verification from the company that it: (1) does not boycott Israel; and (2) will not boycott Israel during the term of the contract. The signatory executing the Contract on behalf of Seller verifies that Seller and its parent company, wholly owned subsidiaries, majority-owned subsidiaries, and other affiliates, if any, do not boycott Israel and, to the extent the Contract is a contract for goods or services, will not boycott Israel during the term of the Contract. As used in the foregoing verification, "boycott Israel" means refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations specifically with Israel, or with a person or entity doing business in Israel or in an Israeli-controlled territory, but does not include an action made for ordinary business purposes. The signatory understands "affiliate" to mean an entity that controls, is controlled by, or is under common control with the signatory and exists to make a profit. This section does not apply to a Vendor which is a sole proprietorship and/or which has less than 10 full-time employees. This section does not apply to a contract valued at less than \$100,000.

54. IRAN, SUDAN, AND FOREIGN TERRORIST ORGANIZATIONS: The signatory executing the Contract on behalf of Seller represents that neither Seller nor any of its parent company, wholly-owned subsidiaries, majority-owned subsidiaries, and other affiliates is a company identified on a list prepared and maintained by the Texas Comptroller of Public Accounts under Section 2252.153 or Section 2270.0201, Texas Government Code, and posted on any of the following pages of such officer's internet website:

<https://comptroller.texas.gov/purchasing/docs/sudan-list.pdf>,
<https://comptroller.texas.gov/purchasing/docs/iran-list.pdf>, or
<https://comptroller.texas.gov/purchasing/docs/fto-list.pdf>.

The foregoing representation is made solely to comply with Section 2252.152, Texas Government Code, and to the extent such Section does not contravene applicable Federal law and excludes the entity and each of its parent company, wholly-owned subsidiaries, majority-owned subsidiaries, and other affiliates, if any, that the United States government has affirmatively declared to be excluded from its federal sanctions regime relating to Sudan or Iran or any federal sanctions regime relating to a foreign terrorist organization. The signatory understands "affiliate" to mean any entity that controls, is controlled by, or is under common control with the signatory and exists to make a profit.

City of Rowlett RFP No. 2025-166-B Strategic Planning Services

I. Introduction

The City of Rowlett ("City") is soliciting proposals from qualified and experienced consultants ("Consultant") experienced with local government or municipal organization to create a strategic plan for the City through a comprehensive, data-driven, and community-engaged planning process, in accordance with the terms, conditions, and requirements set forth in this request for proposal ("RFP") document. The resulting strategic plan should be completed by December 1, 2025. The contract will be awarded to the consultant providing the best value to the City, as determined by the evaluation criteria as stated herein.

The City reserves the right to award any or all line items, in whole or in part, to one or more consultants. Any services stated herein are an accurate reflection of the City's anticipated needs. However, due to budget contingencies, services may be adjusted prior to award, or at any time during the contract period. At no time will adjustments to the prices offered be imposed on the City. Prices will be held firm during the contract period.

The successful Consultant will be required to execute a Consultant Services Agreement. A sample Agreement is available for viewing upon request, in the Purchasing Office.

II. General Information

Rowlett is home to nearly 68,000 residents and is nestled on the shores of Lake Ray Hubbard in far east Dallas County and a portion of west Rockwall County. Rowlett is a Home Rule City subject to the State of Texas laws, rules and regulations. The City Council consists of a Mayor and six (6) Councilmembers who are elected at-large representing all residents within the City limits, with each serving a staggered three-year term.

The City operates under a system of local government called the Council/Manager form. The elected officials are the community leaders and policy makers who establish a vision for the City, and who hire the City Manager to carry out that policy and ensure that all residents are being equitably served. The City Manager leads, directs, and coordinates all City operations and staff, who help ensure the smooth and efficient delivery of services. The organizational chart for the City is as follows:



III. Pre-Proposal Conference

An online pre-proposal conference will be held for this project at 10:00am, July 23, 2025. Attendance is optional, but interested parties are strongly encouraged to attend. To participate in the pre-proposal conference, please use the following:

Meeting ID: 240 248 489 338 9

Passcode: Jj3Hd2fU

Link: https://teams.microsoft.com/l/meetup-join/19%3ameeting_Zjc0YThiNjktMWnkNS00ZGRmLWE1ZWUtOTIhNTAxNjVmYjdk%40thead.v2/0?context=%7b%22Tid%22%3a%2285803b12-c237-45fd-bc07-0d2e834e5e62%22%2c%22Oid%22%3a%227d17b5ea-5a46-4540-84b7-f45b211dff03%22%7d

IV. Public Opening

This is an informal process. Therefore, no public opening will be held for this solicitation.

V. Project Description

The City is issuing this RFP to select and engage a Consultant with proven expertise in working with local governments or municipal organizations. The purpose of this project is to develop a forward-looking, comprehensive strategic plan that will serve as a guiding document for the City's growth and evolution.

VI. Scope of Services

The following Scope of Services is envisioned for the project and should be considered when responding to the RFP. Nothing in this description shall be construed as limiting the potential scope of work to this description or to require that this description be included in the final scope of work for the project. Nothing in the following Scope of Services should be construed as limiting the types of work that a potential Consultant may address in a response to this Request for Proposals. Consultant should address all services which, based on their experience, are deemed necessary to achieving the City's goals.

A. Qualifications

1. Consultant shall have been actively engaged in strategic planning services for a minimum of five (5) years under its current name and in good standing with a track record of performance and must provide evidence of such. If name changes have occurred in the past ten (10) years, provide these name changes in chronological order. Recent start-up businesses do not meet the requirements of this solicitation.

NOTE: A start-up business is defined as a new company that has no previous operational history or expertise in the relevant business and is not affiliated with a company that has that history or expertise

2. Consultant shall operate as an independent contractor and not as an agent, representative, partner, or employee of the City, and shall control the operations at the work site, and be solely responsible for the acts of omissions of the successful consultant(s) employees or agents.
3. Consultant shall have verifiable experience specializing in local government or municipal organizations developing a strategic plan.
4. Consultant shall comply with all applicable governmental laws and regulations.

B. Services

The services listed below are not intended to be a comprehensive list of what the Consultant will provide. The final scope of services will be developed in collaboration with the selected Consultant. The scope of services will, at a minimum, include the following:

1. Strategic Plan Development:

- a. Facilitation of Planning Process: Facilitate a strategic planning process to engage key stakeholders (e.g., leadership team, staff, City Council) in the development of the strategic plan.
- b. Data Collection and Analysis: Gather, organize, and analyze relevant data to inform the strategic planning process.
- c. Vision, Mission, and Values: Assist in creating, reviewing, or refining the organization's vision, mission statement, and core values, if needed.
- d. Strategic Goals and Objectives: Facilitate the development of clear, measurable, and achievable strategic goals and objectives that align with the organizational mission and vision.
- e. Action Plan: Develop an actionable plan that outlines specific steps, timelines, responsible parties, and resource requirements for achieving the strategic goals.
- f. Communications Plan: Develop a robust communication strategy to effectively communicate the strategic plan to members and stakeholders.
- g. Performance Metrics: Define key indicators and outcomes that will serve as the basis for measuring the plan's success.
- h. Final Strategic Plan Document: Produce a comprehensive strategic plan document outlining all aspects of the plan.

VII. Insurance Requirements

ALL RESPONDENTS must submit, with the proposal, proof of insurance coverage as stipulated in Exhibit A to this proposal document. Proof shall be by submission of copies of ~~current policies or~~ current Certificates of Insurance, including the effective dates of coverage. Any provisions outlined will be required of the successful Consultant only. Prior to the execution of this contract, the successful Consultant will supply the Purchasing Office with an original certificate of insurance evidencing the stated requirements and provisions. This insurance shall be effective for the contract duration and renewal certificates shall also be supplied upon expiration.

VIII. Submittals

In order for your proposal to be considered responsive, the following information should be submitted in the order outlined below. Failure to provide requested information may cause your proposal to be deemed as non-responsive.

A. Transmittal Letter (Label as Section A)

1. Include a transmittal letter summarizing your understanding of this engagement, and why you believe yourself to be the best Consultant for this project.

B. Consultant Information (Label as Section B)

1. Consultant information should include a cover letter containing legal company name, address, telephone number, and number of years in business. Also include acknowledgement of all Addendums issued for this solicitation.

2. Include name of contact person authorized to submit a proposal and negotiate a contract on behalf of your firm, including telephone number and email address.
 3. If name changes have occurred in the past ten (10) years, provide these name changes in chronological order, if applicable.
- C. Qualifications of Team Members (Label as Section C)
1. Identify the key professionals that will be actively involved in this engagement and describe their area of expertise and what role they will perform on the project team. Include an organizational chart showing the structure of the project team.
 2. Provide resumes for key team members, including name, educational background, professional qualifications, time with the firm, and a list of relevant projects and their role in each.
- D. Project Approach and Methodology (Label as Section D)
1. Describe the firm's philosophy, approach, and methodology to strategic planning in general.
 2. Describe methodology for project management, research, stakeholder engagement, and plan development, and address how each demonstrates innovation, utilizes data-driven analysis, and aligns with the objectives of the City.
 3. Describe successful methods used to engage a diverse range of stakeholders and the public, including communication plans, community dashboards, and training programs, while ensuring inclusivity and transparency.
 4. Provide an example of a recently completed project(s) and provide details outlining your project management plan. Specifically, explain how you met deadlines and remained within budget.
- E. Implementation, Monitoring and Reporting (Label as Section E)
1. Describe the proposed implementation strategy for this engagement, which should include quantifiable objectives, responsibility, oversight systems, and reporting frameworks to guarantee the success and flexibility of the plan.
- F. Project Timeline (Label as Section F)
1. Submit a project timeline outlining each proposed phase and the associated deliverables for this engagement.
- G. Experience and References (Label as Section G)
1. Provide a list of recently completed and currently active projects, along with a statement regarding your firm's current workload. Provide descriptions of several projects that are most similar to the work your firm may perform for the City and best exemplify your qualifications for this work, including location, client name, scope, total cost, and key team members and their roles.
 2. Provide a recently completed strategic plan document for a local government or municipal organization similar to the scope of services outlined in this RFP.

3. Provide at least three (3) references for organizations of similar size, and same or similar scope of work as described in this RFP document. List a contact person for each reference and include full name, title, telephone number and email address.

H. Fee Schedule (Label as Section H)

1. Please submit a Fee Schedule outlining project phases, milestones, and pricing to provide all services as outlined in this RFP. All fees associated with providing the services must be included in order to be considered.

I. Additional Information (Label as Section I)

1. Proof of Insurance
2. List any exceptions to the Standard Terms and Conditions of Procurement or the RFP requirements for the City's consideration. If none, please include a statement indicating there are no exceptions.
3. Proposal Certification Form

IX. Evaluation Criteria

A review committee will judge the merit of proposals received in accordance with the requirements defined herein. Failure of vendor to provide in their proposal any information requested in this RFP may result in disqualification of the proposal. The sole objective of the review committee will be to select the Consultant(s) that provides the best value to the City. The contract will be awarded based on the following evaluation criteria:

Criteria	Description	Points
EXPERIENCE & QUALIFICATIONS	Proven proficiency in strategic planning for local government, along with pertinent project examples and the qualifications of essential personnel. This includes references and a clear comprehension of municipal challenges, as evidenced in Article VIII. Submittals, Sections C and G.	30
PROJECT APPROACH & METHODOLOGY	The proposed methodology for project management, research, stakeholder engagement, and plan development exhibit high quality and clarity. Demonstrates innovation, utilizes data-driven analysis, and aligns with the objectives of the City, as evidenced in Article VIII. Submittals, Section D.	25
IMPLEMENTATION, MONITORING & REPORTING	Practicality and comprehensiveness of the implementation strategy, which encompasses quantifiable objectives, responsibility, oversight systems, and reporting frameworks to guarantee the success and flexibility of the plan, as evidenced in Article VIII. Submittals, Section E.	20
PROJECT TIMELINE	Ability to comply with the City's deadlines and resource accessibility. This includes the clarity and sensibility of the schedule, as evidenced in Article VIII. Submittals, Section F.	15
COST	The total cost to provide all services, as evidenced in Article VIII. Submittals, Section H.	10
TOTAL POINTS		100

X. Interviews and Presentations

In fairness to all firms, requests for interviews prior to the closing time and date will not be permitted. Interviews with selected vendors may or may not be requested by the City after the closing date.

Selection may be made strictly from the information provided in the RFP. However, the City reserves the right to conduct interviews with and request presentations from any respondents.

XI. Best and Final Offer

The City reserves the right to request a best and final offer from any or all vendors. The City also reserves the right to reject any or all proposals, with or without cause, re-issue the RFP, or proceed in any manner determined to be in the best interest of the City.

XII. Questions Deadline

The City requires that all questions relating to this RFP be submitted in writing through bidnet, the City's eProcurement system, or to January Calhoun, Purchasing Manager, at jcalhoun@rowlett.com by 12:00pm on July 24, 2025. No questions will be answered over the phone. Questions in regard to the scope of services will only be accepted until the stated deadline. Any changes to the RFP Documents will be made by City in the form of a written Addendum. Any changes made in any other manner will not be binding upon the City, and proposer may not rely upon them.

XIII. Submission or Delivery of Proposal

Proposals are due no later than July 31, 2025, at 2:00pm. Submissions will be received online, or in hard copy.

Submitting a proposal constitutes understanding and acceptance of all terms, conditions, instruction, glossary, specifications, forms and statements contained in this RFP document.

The date/time stamp located in the Purchasing Office serves as the official time clock. Late Submissions will not be considered. Submissions received after the stated deadline shall be refused and returned unopened. The City is not responsible for issues encountered with methods of delivery.

A. Online Submission

1. Proposals may be submitted online through bidnet, the City's eProcurement system, at the following link: <https://www.bidnetdirect.com/texas/cityofrowlett>.
2. Please ensure that you provide all required information, including attachments, combined and uploaded where indicated in bidnet.

B. Mailed/Delivered Submission

1. Proposal must be submitted with the RFP number and the respondent's name and address clearly indicated on the front of the envelope.
2. Please submit one (1) unbound original of your proposal and one (1) electronic copy on a thumb drive in a sealed envelope or package to the address listed below:

Delivery Address

City of Rowlett
Attn: Purchasing Manager
4000 Main Street
Rowlett, TX 75088

Mailing Address

City of Rowlett
Attn: Purchasing Manager
PO Box 99
Rowlett, TX 75030-0099

RFP 2025-166-B
STRATEGIC PLANNING SERVICES
PROPOSAL CERTIFICATION FORM

By submitting a proposal, the Consultant certifies that the Standard Terms and Conditions for Procurements, the RFP requirements, and all issued Addendums have been read and are fully understood, and it's the Consultant's intent to enter into negotiations for a contract for Strategic Planning Services. Consultant agrees to abide by the terms and statutory requirements governing the solicitation process.

All addenda shall be issued in written form by the Purchasing Office. The City is not bound by any oral representations, clarifications, or changes made in connection to the RFP by the City's employees, agents or consultants unless in the form of a properly issued Addendum.

The failure of the Consultant to contact the Owner to determine the issuance of any Addenda, or to acknowledge receipt of any and all of the Addenda issued in connection with this project, shall entitle the City, at its sole discretion, to (i) reject the proposal of the Consultant as being non-responsive, or (ii) to accept the proposal of the Consultant, in which event the Consultant agrees to be bound by all of the terms and conditions of each unacknowledged Addendum.

A. FIRM INFORMATION

Legal Name of Vendor: _____

Tax ID Number: _____ Telephone No: _____

State of Formation: _____ Year of Formation: _____

Address: _____

Contact Name and Title: _____

Contact Phone No: _____

Contact Email Address: _____

B. CERTIFICATION

I certify that I have the legal authority to bind the Consultant listed above, and I further certify that there are no objections to any of the terms and conditions listed in this RFP document, except as noted in Article VIII. Submittals, Section I. Additional Information, Item 2. (if applicable).

Signature of Authorized Representative: _____

Printed Name and Title of Authorized Representative: _____

Date of Certification: _____



EXHIBIT A STANDARD INSURANCE REQUIREMENTS

Company shall procure and maintain for the duration of the contract, insurance coverages outlined herein which may arise from or be in connection with the performance of the work hereunder by the Company, his agents, representatives, employees or subcontractors. Any exceptions to the requirements or provisions herein shall be submitted in writing to the City's Risk Manager for consideration and approval. The decision of the City will be final. The cost of such insurance shall be borne by the Company.

1.0 GENERAL PROVISIONS

- 1.1 The Company shall obtain and maintain the minimum insurance coverage set forth in this section. By requiring such minimum insurance, the City of Rowlett shall not be deemed or construed to have assessed the risk that may or may not be applicable to the Company. The Company shall assess its own risks and if it deems appropriate and/or prudent, maintain higher limits and/or broader coverage. The Company is not relieved of any liability or other obligation assumed or pursuant to the Contract by reason of its failure to obtain or maintain insurance in sufficient amounts, duration, or types. The insurance requirements listed below do not replace any warranty or surety (performance, payment, or maintenance) bonds if required by preceding or subsequent sections of this contract.
- 1.2 Company shall cause each subcontractor employed by Company to purchase and or maintain insurance of the type specified herein or cover such subcontractor under its insurance coverage.
- 1.3 The Company agrees that the insurance requirements specified in this section do not reduce the liability Company has assumed in any indemnification/hold harmless section of this contract.
- 1.4 City reserves the right to approve the security of the insurance coverage provided pursuant to this section by insurers including terms, conditions and the Certificate of Insurance. Failure of the Company to fully comply with requirements of this section during the term of this contract will be considered a material breach of contract and will be cause for immediate termination of the contract at the option of City.
- 1.5 Insurance coverage required by this section shall:
 - 1.5.1 Be on a primary basis, non-contributory with any other insurance coverage and/or self-insurance carried by City.
 - 1.5.2 Be with an insurer possessing an A-VII A. M. Best Rating or equivalent.

2.0 MINIMUM INSURANCE COVERAGE & LIMITS

- 2.1 Commercial General Liability. Company shall maintain commercial general liability and, if necessary, commercial umbrella or excess liability (umbrella or excess liability should be provided on follow-form policy).
- 2.2 Commercial general liability insurance shall be written on an ISO occurrence form CG 00 01 (or a substitute form providing equivalent coverage) and shall cover liability arising from premises, operations, independent Company's, product-completed operations, personal and advertising injury and liability assumed under an insured contract (including the tort liability of another assumed in a business contract).

2.3 City shall be included as an additional insured under the commercial general liability using ISO additional insured endorsement CG 20 10 07 04 and CG 20 37 07 04 or their equivalent, including coverage for City with respect to liability arising out of the completed operations of Company.

2.4 Limits of Insurance

Contracts between \$0 and \$1,000,000		
Type of Insurance	Amount of Insurance	Provisions
1. Commercial General (Public) Liability to include coverage for: a) Premises/Operations b) Products/Completed Operations c) Independent Contractors d) Personal Liability e) Contractual Liability	\$1,000,000 each occurrence \$2,000,000 general aggregate \$2,000,000 Umbrella/ Excess Liability (follow-form)	City to be listed as additional insured and provided 30-day notice of cancellation or material change in coverage by Vendor City to be provided a waiver of Subrogation
2. Business Auto Liability	\$1,000,000 per occurrence \$1,000,000 aggregate or; \$1,000,000 combined single limits	City to be named as additional insured
3. Workers' Comp & Employers' Liability	- Statutory Limits \$1,000,000 per occurrence each-accident	City to be provided a waiver of subrogation
4. Builders Risk Policy	100% of construction total	If Applicable
5. Other Coverages a) Professional Liability b) E & O coverage c) Cyber Liability	To be determined by the City's Risk Manager on a per project basis	If Applicable

Contracts between \$1,000,000 and \$8,000,000		
Type of Insurance	Amount of Insurance	Provisions
1. Broad Form Commercial General Liability to include coverage for: a) Premises/Operations b) Products/Completed Operations c) Independent Contractors d) Personal Liability e) Contractual Liability	\$2,000,000 each occurrence \$4,000,000 general aggregate \$4,000,000 Umbrella/ Excess Liability (follow-form)	City to be listed as additional insured and provided 30-day notice of cancellation or material change in coverage City to be provided a waiver of Subrogation
2. Business Auto Liability	\$1,000,000 per occurrence \$2,000,000 aggregate or; \$2,000,000 combined single limits	City to be named as additional insured

3. Workers' Comp & Employers' Liability	• Statutory Limits • \$1,000,000 each accident	City to be provided a waiver of subrogation
4. Builders Risk Policy	• 100% of construction total	If Applicable
5. Other Coverages a) Professional Liability b) E & O coverage c) Cyber Liability	• To be determined by the City's Risk Manager on a per project basis	If Applicable

- 2.4.1 If vendor is performing service-related work on City fleet, Garage Keeper Liability is required at a limit of not less than \$1,000,000 per occurrence on a special form basis.
- 2.4.2 If contract has exposure for environmental hazards contact City's Risk Manager for specifications. (Including MCS-90).
- 2.4.3 Contracts for construction projects taking place in a high-risk flood zone area may require additional coverage requirements.
- 2.4.4 Insurance specifications for Contracts in excess of \$8,000,000 will be determined by the City's Risk Manager.
- 2.5 Commercial Automobile Liability. Company shall maintain business automobile liability insurance and, if necessary, commercial umbrella liability insurance with a limit of not less than \$1,000,000 per occurrence.
- 2.6 Such automobile liability insurance shall cover liability arising out of any auto (including owned, hired, and non-owned automobiles).
- 2.7 Commercial automobile coverage shall be written on ISO form CA 00 01, CA 00 05, CA 00 12, CA 00 20, or a substitute form providing equivalent liability coverage. If necessary, the policy shall be endorsed to provide contractual liability coverage equivalent to the amount provided in ISO form CA 00 01.
- 2.8 Company waives all rights against City and its agents, officers, directors and employees for recovery by the commercial automobile liability or commercial umbrella liability insurance obtained by Company pursuant to this section or under any applicable automobile physical damage coverage.
- 2.9 Workers' Compensation & Employer's Liability. Company shall maintain workers' compensation insurance with a limit of no less than \$1,000,000 per occurrence each incident. The employers' liability limit and, if necessary, commercial umbrella coverage, shall not be less than \$1,000,000 each accident for bodily injury by accident or \$1,000,000 each employee for bodily injury by disease.
- 2.10 Company waives all rights against City and its agents, officers, directors and employees for recovery of damages under Company's workers' compensation and employers' liability in connection with scope of contract and completed operations.

3.0 EVIDENCE OF INSURANCE

- 3.1 Prior to commencement of work, and thereafter upon renewal or replacement of coverage required by this section, Company shall furnish City a certificate(s) of insurance, executed by a duly authorized representative of each insurer, showing compliance with this section. Company shall furnish copies of all endorsements as required by each section.
- 3.2 Failure of City to demand such certificate(s) or other evidence of full compliance with these insurance requirements or failure of City to identify a deficiency from evidence that is provided shall not be construed as a waiver of Company's obligation to maintain such insurance.
- 3.3 City shall have the right, but not the obligation, of prohibiting Company or any subcontractor from entering the project site until such certificates or other evidence that insurance has been placed in complete compliance with these requirements is received and approved by the City.
- 3.4 Failure to maintain required insurance may result in termination of this contract at sole option of the City.
- 3.5 All Certificates of Insurance need to reference job or contract number in comments section.
- 3.6 Certificate Holder shall be listed as follows: City of Rowlett, 4000 Main St., Rowlett, TX 75088

RFP 2025-166-B
STRATEGIC PLANNING SERVICES
PROPOSAL CERTIFICATION FORM

By submitting a proposal, the Consultant certifies that the Standard Terms and Conditions for Procurements, the RFP requirements, and all issued Addendums have been read and are fully understood, and it's the Consultant's intent to enter into negotiations for a contract for Strategic Planning Services. Consultant agrees to abide by the terms and statutory requirements governing the solicitation process.

All addenda shall be issued in written form by the Purchasing Office. The City is not bound by any oral representations, clarifications, or changes made in connection to the RFP by the City's employees, agents or consultants unless in the form of a properly issued Addendum.

The failure of the Consultant to contact the Owner to determine the issuance of any Addenda, or to acknowledge receipt of any and all of the Addenda issued in connection with this project, shall entitle the City, at its sole discretion, to (i) reject the proposal of the Consultant as being non-responsive, or (ii) to accept the proposal of the Consultant, in which event the Consultant agrees to be bound by all of the terms and conditions of each unacknowledged Addendum.

A. FIRM INFORMATION

Legal Name of Vendor: Baker Tilly Advisory Group, LP

Tax ID Number: 99-1405547 Telephone No: +1 (312) 729 8098

State of Formation: Illinois Year of Formation: 1931

Address: 12221 Merit Dr, Suite 1200, Dallas, TX 75251

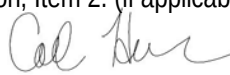
Contact Name and Title: Caitlin Humrickhouse, Principal

Contact Phone No: +1 (312) 729 8098

Contact Email Address: caitlin.humrickhouse@bakertilly.com

B. CERTIFICATION

I certify that I have the legal authority to bind the Consultant listed above, and I further certify that there are no objections to any of the terms and conditions listed in this RFP document, except as noted in Article VIII. Submittals, Section I. Additional Information, Item 2. (if applicable).

Signature of Authorized Representative: 

Printed Name and Title of Authorized Representative: Caitlin Humrickhouse, Principal

Date of Certification: July 31, 2025

A. TRANSMITTAL/COVER LETTER



July 31, 2025

David Hall
City Manager
City of Rowlett

Dear Mr. Hall:

On behalf of the Mejorando Group, I am pleased to offer our expertise to the City of Rowlett as a partner engaged in assisting with your efforts aimed at creating the inaugural Strategic Plan to ensure it reflects the newly minted governing body's vision and direction. Maintaining a healthy balance between the status quo and innovation is hard work. Striking the right balance between sustaining a legacy organization and building for the future requires judgment.

As a result of the enormity and pace of change along with the evolving role of local government as the advocate for a better quality of life, convening elected officials and executive leadership team members in a strategic planning process to determine organizational priorities into the foreseeable future, is beneficial. Assembling these groups allows City leaders, in a collaborative manner, to make fundamental decisions that guide them to a developed vision of the future. An effective and robust strategic planning process will fortify relationships among members and increase a shared understanding about the future of Rowlett, help guide staff in building budgets, serve to prioritize services and resources, ensure alignment about expectations between elected officials and staff and determine the optimal path forward in the collective quest to deliver high quality public services and programs towards a stronger community over the next several years.

Described in detail further in this proposal, our process will:

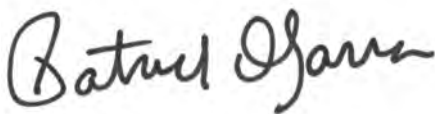
- ☑ Guide the governing body and executive leadership team members through a credible and modern process necessary to execute an *effective* and *sustainable* strategic plan.
- ☑ Obtain input from key stakeholders on the challenges facing the city and potential strategies to effectively address them.
- ☑ Facilitate the development of Vision, Mission, Core Values, Strategic Focus Areas, Goals, Performance Measures and an Implementation Plan.
- ☑ Synthesize inputs into a 'living' Strategic Plan which serves as a *roadmap* for success and a *tool* used for future budgeting and policy; and
- ☑ Develop a framework for communicating goals and progress City-wide.

Our qualifications are highly relevant in terms of performing your specific tasks and providing quality deliverables that will be useful. The Mejorando Group, a Certified Minority-Business Enterprise (MBE) – Hispanic owned, has **extensive experience and in-depth expertise designing and facilitating Strategic Planning processes** and has performed several similar engagements for cities of comparable size to Rowlett including Bismarck (ND - pop. 75,092), Flower Mound (TX - pop. 78,854) , Mooresville (NC - pop. 53,721), Pico Rivera (CA - pop. 64,001), Pittsburg (CA - pop. 72,141) and Queen Creek (AZ - pop. 66,146). Moreover, we have partnered with a number of cities in the Dallas Metroplex area, providing a range of services including Strategic Planning - Carrollton (pop. 135,834), Coppell (pop. 41,404), Denton (pop. 158,349), Highland Park (pop. 8,642), Hurst (pop. 39,304), Lewisville (pop. 112,944), McKinney (pop. 213,509), and North Richland Hills (pop. 70,658). The Mejorando Group considers [Strategic Planning facilitation services](#) to be one of our core competencies of our overall consulting practice.

Established in 2002, my firm offers consultation, facilitation, and training, supported by fresh thinking, innovation and “next practices” to help governments succeed in the 21st century. We take our name from the Spanish word, Mejorando, which means “Getting Better All the Time.” This reflects our commitment to our approach with clients who are seeking new ways to improve constantly. **As a former city manager, and a person who invested over 15 years of my career in local government and including as a team member Kim Newcomer of Slate Communications, with a deep background in local government strategic planning, particularly in the area of effective marketing and community outreach,** we are extremely familiar with the issues and constraints confronted by those dedicated individuals, within organizations who choose daily to recommit themselves to high quality public service. Based on our experience and expertise, we bring government leaders a valuable perspective and offer practical advice and contributions enabling them to lead their organizations more effectively.

If you have any questions regarding the content of this proposals or need more information, please contact me at 925-518-0187 or via e-mail at patrick@gettingbetterallthetime.com.

Sincerely,



Patrick Ibarra
Co-Founder and Partner

EXECUTIVE SUMMARY

Local government directly affects the daily existence and quality of life for residents within the community. The political leadership of local government is about making things happen that might not otherwise happen and preventing things from happening that ordinarily might happen. It is a process that helps transform intentions into positive actions and visions into reality. The role of government is evolving, in particular for the City of Rowlett, but the question is what direction is it moving? The actions that position Rowlett for the future differ from a “we’ve always done it that way” approach. In fact, strategic planning will ensure City leaders make changes before you have to instead of because you have to. More than a project, strategic planning capitalizes on the community’s strengths and serves as a catalyst to marshal precious resources towards the desired goals.

The Strategic Plan will be used to capture the Council’s strategic priorities and City management’s understanding of municipal operations and service delivery while gathering input which crystalizes long-range priorities and initiatives as the community approaches the future. Our proposed process includes the Council’s strategic direction, feedback from City employees, public input (optional), and relevant documents such as the City’s Budget, CIP, and other long-range planning devices. These initiatives are a critical product of the planning process as they will shape the City Manager’s decisions in structuring the organization and assigning resources toward goals. Similarly, departments will use the initiatives and goals defined to shape City operations and services over the coming years.

This process will result in decisions that determine:

- What is the City’s role in addressing emerging trends? The City’s most precious resource isn’t money, it’s time; what do the Mayor, Winget and City Council want staff to devote their time, effort and energy towards achieving?
- How the Vision and Mission statements need to be established to reflect the City’s evolving role as a community builder.
- Goals are performance magnets so that being said, establishing goals and performance measures to clarify direction and monitor progress.
- A meaningful approach to monitor the progress of completing objectives.
- A contemporary means by which to keep residents and businesses apprised of the status of the Strategic Plan.

The intent for this undertaking is to enlist key members in a collaborative process to pursue Rowlett’s potential. Not a deficit closing strategy, the purpose is to capitalize on the community’s strengths and establish priorities for the near- and short-term. Every community has identical ingredients, but what differentiates them is their recipe and that’s where priority setting comes into play. A robust and well-designed set of priorities that emphasize execution is the equivalent of the community’s recipe for success and serves as a means of community insurance.

Conversations among members will deal with two worlds – the world of facts and data, and the world of ideas and perceptions. Dialogue, conversation quality, and engagement will allow them to experiment with ideas and perceptions by taking facts and data into imagined or speculative worlds for the future of your community.

The outcome of these discussions is to help decision-makers construct and evaluate an array of options that offer a broader view of the landscape and possibilities for success. Exploring the community through various lenses helps decision-makers build their capacity to be agile – possessing the balance and capability that enable them to shift focus, priorities, and resources to meeting changing circumstances.

Our view is that strategic planning must be seen as both **a process and a product**. Regarding the **process**, strategic planning is to obtain input from a broad range of stakeholders and equip policy makers with the ability to toggle between being responsive and proactive while recognizing the limited capacity for City finances and staff time. It's a priority-setting process to enhance the quality of life for your residents and operationalizing intent into action. Concerning the **product**, the Strategic Plan is a document that once adopted by the governing body is shared with the public and updated periodically to demonstrate progress on various items. While not entirely a budget-centric document, a strategic plan is intended to provide a link between authorized spending and broad organizational goals. Operationalizing the various elements of the Strategic Plan into the relevant City departments' portfolio of services via an Implementation Plan is essential for successful execution.

Our **Work Plan/Methodology** is comprised of Five Phases:



Execution is the strategy so our results-based approach will ensure a genuinely collaborative process for prudent and thoughtful risk-taking by elected officials and executives in their desire to build a more vibrant community, while maintaining a strong emphasis on creating a meaningful outcome – a credible road map that accelerates your upward trajectory towards an even better future.

A number of **deliverables** will be generated throughout the Strategic Planning process including a clear description of the organization's internal capacities (strengths and weaknesses) and of the external forces that will likely have an impact on its ability to seize future opportunities, a compelling vision that is widely shared throughout the organization along with a practical mission statement that employees can use every day to guide their decision making and actions, a strategic agenda that will drive departmental, work unit, and team actions toward the organization's vision and for each item on the agenda, target outcomes and goals that have been determined to ensure

organizational accountability, and finally a comprehensive operational plan that translates the strategic vision and the strategic agenda into actions. There is also a built-in mechanism to periodically assess the plan's effectiveness and relevance and a method to integrate flexible innovation into the plan.

B. CONSULTANT INFORMATION

Legal Name: Patrick Ibarra, dba The Meiorando Group

Address: 13 Muirfield Road Cumberland, Maine 04021

Telephone Number: (925) 518-0187

Number of Years in Business: 23. Established in 2002.

Acknowledging all Addendums (#1 and #2)

Contact Person: Patrick Ibarra

Telephone Number: (925) 518-0187

Email Address: patrick@gettingbettrallthetime.com

No name changes have ever been made since the firm was established.

C. QUALIFICATIONS OF TEAM MEMBERS

Based in Cumberland, Maine and founded in 2002, the Mejorando Group, a Hispanic owned and Certified Minority-Business Enterprise (MBE), is a consulting practice focused on improving the management and operation of government organizations. Offering consultation, facilitation, and training services the Mejorando Group values building and sustaining customer relationships by helping align your most important resource – your people – so that your organization moves faster and more successfully toward accomplishing your goal of high-quality public service. **We take our name from the Spanish word, Mejorando, which translated means “Getting Better All The Time.” This reflects our commitment to our approach with clients who are seeking new ways to improve constantly.**

We have partnered with leaders from hundreds of local governments across the nation, helping translate the headwinds of change into a tailwind. In particular, designing and facilitating strategic planning processes for governments of all sizes. We design a productive process, create a thought-provoking, enjoyable environment, with a blend of practicality and imagination, where leaders can exchange ideas and increase their capability to effectively toggle between being responsive and proactive in their pursuit to build a stronger community. Our purpose is to help the City of Rowlett continue to succeed by choice. We are fortunate to have several repeat clients with whom we have partnered over the course of several years. Our firm’s name, Mejorando, is translated from Spanish into “getting better all the time” and describes our mission to help leaders serious about continuous improvement in their quest to build stronger, more vibrant communities.

Against a backdrop of changing mission requirements, shifting workforce demographics and increased public expectations of what the government can deliver, local governments are striving to attain the next level of performance – incorporating mission changes while they implement new technologies, equip an emerging workforce, adapt operating practices, and maintain stable budgets and respond to fluctuating budgets. These multiple challenges are having a profound effect on the resources public sector agencies require, creating a need for organizations to adjust the size and mix of their workforce and strengthen workforce capabilities.

We have earned a national reputation by delivering quality work products to our clients, helping them accelerate high performance. We feature a proven record of partnering with organizations through the myriads of issues influencing individual performance, group/team interactions, and overall organizational effectiveness. Our “hands-on” approach and ability to collaborate with all levels, from field personnel to executive management, enable us to integrate strategy, structure, process, quality, and culture to the desired end: optimal performance.

The Mejorando Group is comprised of professionals that have served as executives and managers in organizations from both the public and private sectors and together have

several years of experience working in all aspects of local government management. As a result, we bring you extensive experience, breadth of expertise, strong people management skills, seasoned judgment and a valuable perspective that provides for an immediate connection with your organization's employees.

Our full range of services includes the following:

- **Facilitation Services** – Our approach to facilitation, from group development to strategic planning, enables a group to focus on future conditions and generate progressive strategies and innovative tactics to effectively anticipate and respond to those often-changing circumstances. This results in a proactive and dynamic approach to sustaining a high-quality, high-performance organization. We are certified in Facilitation Skills from Development Dimensions International (DDI).
- **Talent Management Programs and Services:**
 - o **Succession Planning Programs** – We are one of the country's leading experts in effectively addressing the impacts from the changing workforce and designing succession planning programs. We design and implement all aspects of a robust Succession Planning Program which focuses on establishing job-level Competencies and recommending targeted improvements to Recruitment, Selection, Leadership Development, Workforce Learning/Training, and Promotional processes – in which all are synchronized towards equipping an agency's workforce with the skills and capabilities to maintain high-quality service delivery and effective local government.
 - o **Learning/Training – Design and Delivery** - Our "instructor-led, participant centered" approach to training limits lecture and focuses on using a variety of instructional methods (e.g., discussions, video-clips, case studies, small group exercises, handouts to complete, skill-practices, and group discussions) to maximize the use of Adult Learning. Our goal is for participants to master the knowledge, skills and behaviors emphasized in the training program and apply them to their day-to-day activities. We feature over 25 competency-based training workshops for workforce members from all areas of your organization, front-line to executives.
- **Organizational Analysis and Process Improvement** – We review and analyze various functional areas within an organization to help discover more effective ways to manage and perform management and organizational activities. The Mejorando Group helps organizations succeed in their efforts to excel by utilizing a results-oriented approach that assesses the current effectiveness of existing strategies, structures, programs, work processes, and measurement systems. Strategies and tactics are provided to disrupt the status quo, and breakthrough practical solutions are implemented to align the organization's people and work processes toward high performance.

Ours is a virtual consulting firm in which we blend our expertise and experience with that of other boutique-type firms to benefit our clients. This arrangement generates multiple dividends, including the application of extensive subject-matter experts and seasoned organizational development practitioners combined with the vast experience and expertise of former local government executives. Together, we help to effectively disrupt the status quo and bring leading-edge solutions to improve employee performance and organizational effectiveness.

Patrick Ibarra

Co-Founder and Partner, The Mejorando Group

As co-founder and partner, Patrick Ibarra is responsible for Strategic Planning Processes and Facilitation, Talent Management (i.e., Succession Planning), and Organizational Effectiveness services. As a Consultant and Manager in both public and private sector organizations, **including as a city manager**, Mr. Ibarra brings organizations over 40 years of experience, and a shared understanding of the particular demands and constraints placed on government organizations and their employees.

Patrick has **designed and facilitated strategic planning processes since 2022** for the following local governments:

Arizona

1. Chandler (pop. 249,146)
2. Kingman (pop. 29,726)
3. Queen Creek (pop. 66,146)

California

4. Alhambra (pop. 84,647)
5. Artesia (pop. 15,944)
6. Bakersfield (pop. 407,715)
7. Banning (pop. 30,273)
8. Calabasas (pop. 22,227)
9. Claremont (pop. 36,090)
10. Coalinga (pop. 17,369)
11. Concord (pop. 129,183)
12. Costa Mesa (pop. 110,750)
13. Downey (pop. 108,816)
14. Fillmore (pop. 16,496)
15. Kingsburg (pop. 12,662)
16. Monterey Park (pop. 60,439)
17. Norwalk (pop. 106,084)
18. Palmdale (pop. 169,450)
19. Pico Rivera (pop. 64,001)
20. Pinole (pop. 18,821)
21. Pittsburg (pop. 72,141)
22. Placentia (pop. 51,274)
23. San Pablo (pop. 31,124)
24. San Ramon (pop. 75,648)
25. South Pasadena (pop. 26,314)

Colorado

26. Durango (pop. 19,223)
27. Rifle (pop. 9,650)

Florida

28. Pasco County (pop. 584,067)

Illinois

29. Lake Forest (pop. 19,253)

Kansas

30. Hutchinson (pop. 39,712)

Maine

31. Augusta (pop. 19,066)

32. Franklin County (pop. 30,828)

Michigan

33. Ingham County (pop. 284,034)

North Carolina

34. Mooresville (pop. 53,721)

North Dakota

35. Bismarck (pop. 75,092)

Oklahoma

36. Bartlesville (pop. 36,412)

Texas

37. **Arlington (pop. 395,477)**

38. **Carrollton (pop. 135,834) - 2025**

39. **Denton (pop. 136,195)**

40. **Flower Mound (pop. 78,854)**

41. **Georgetown (pop. 96,312)**

42. **Highland Park (pop. 8,642) - 2025**

43. **Hutto (pop. 30,855) - 2025**

44. **Laredo (pop. 257,602) - 2025**

45. **Lewisville (pop. 112,944)**

46. **Pearland (pop. 125,990) - 2025**

Patrick utilizes thought-provoking and relevant exercises to actively engage the group, uses consensus decision-making techniques, guides group discussions to stay on track, manages conflict using a collaborative approach, and creates an environment where members enjoy a positive, growing experience while they work to attain group goals.

Employment History

- The Mejorando Group Consulting Practice, Co-Founder and Partner
- City of Port Angeles, Washington City Manager
- City of Mason, Ohio Assistant City Manager/Human Resource Director
- City of Emporia, Kansas, Management Assistant, Office of the City Manager
- City of Phoenix, Arizona, Management Assistant, Public Works Department

Education

- Master of Human Resources and Organization Development, University of San Francisco
- Master of Public Administration, Arizona State University
- Bachelor of Science degree, Political Science, Central Missouri State University
- Graduate of the University of Virginia Senior Executive Institute for Public Service
- Certified Facilitator, Development Dimensions International

Publications (recent)

- “The Prescription for Curing Leadership Malpractice” – June 2025 issue of Public Management published by ICMA.
- “Comprehensive Guide to Succession Planning: The Time is Right Now! – January 2024 issue of Public Management published by ICMA
- “Break Glass: 10 Emergency Ways to Combat the Hiring Crisis” – February 2023 issue of Public Management published by ICMA.
- “Help Wanted Part Two: The Rapidly Changing Role of Human Resources” – August 2022 issue of Public Management published by ICMA.
- “Help Wanted Part One: Turning Your Workplace into a Talent Magnet” – June 2022 issue of Public Management by ICMA
- “A Healthy Workplace Culture is the “Secret Sauce” for Success, Part 2” – September 2021 issue of Public Management by ICMA
- “A Healthy Workplace Culture is the “Secret Sauce” for Success, Part 1” – August 2021 issue of Public Management by ICMA
- “We’ve Always Done It That Way Is Over: Part Four – Innovating Your Future” December 2020 issue of Public Management by ICMA
- “We’ve Always Done It That Way Is Over: Part Three – Reimagining Your Community” August 2020 issue of Public Management by ICMA
- “We’ve Always Done It That Way Is Over: Part Two - Building a Talent Centric Workforce” May 2020 issue of Public Management by ICMA
- “We’ve Always Done It That Way Is Over: Part One - What’s Next; Leading Change is a Process, not an Event” February 2020 issue of Public Management by ICMA

Conference Presentations - 2025

1. Illinois City/County Management Association
2. International City/County Management Association (ICMA)
3. Maine Municipal Association Human Resources
4. Maine Town and City Managers Association
5. **Texas Municipal Human Resource Association**

Kim Newcomer

Co-Founder, Slate Communications

Kim Newcomer has spent her entire 30-year career in communications and marketing. After serving in a key leadership role, managing the Communications and Public Involvement Office for the City of Fort Collins, Colorado, she founded Slate Communications, a marketing and PR firm. Slate is a communications and marketing firm that works to positively impact communities by providing communications and engagement expertise to local governments.

Kim and her team have helped countless communities with engagement and outreach campaigns. For example:

- *Strategic Planning* in Bartlesville (OK), Franklin County ME), Ingham County (MI), Kingsburg (CA), and Lake Forest (IL). Services include co-creating community outreach strategies and creating Strategic Plan Final Report formats.
- *Community Branding in Salida, CO* – Brands are more than just a logo. Our effort in Salida, CO, included a comprehensive engagement approach to truly define what makes the community unique and how to highlight its strengths. Surveys, community focus groups, social media outreach, and staff workgroups were all used to inform the process.
- *Strategic Communications Plan, Tax Campaign, and Outreach in Corinth, TX* – Using surveys, social media, MyCorinth.com (i.e., Bang the Table platform), animated explainer videos, we were able to build an understanding of and support for a new tax on car rentals to fund a public park.

As a result of her broad-based experience in local government and extensive experience facilitating groups of internal and external stakeholders, Kim will offer insight and proficiency in crafting and implementing a modern community outreach effort. Additionally, she will assist in the various functions of the entire project.

Employment History

- Slate Communications, Founder and CEO
- City of Fort Collins, Communications and Public Involvement Manager
- Operation Healthy Communities, Executive Director

Education

Bachelor of Science degree, Business Administration and Marketing, University of Denver, CO

A. PROJECT APPROACH AND METHODOLOGY

1. Background and Understanding

Organizations, such as the City of Rowlett, are continually presented with unexpected opportunities and unanticipated problems. Hard choices must be made, sometimes quickly, often under conditions in which little is certain. It can be easy to become distracted by these challenges expending time, money, and energy on activities that divert people's attention from the organization's principal goals.

According to the RFP *"the City of Rowlett is soliciting proposals from qualified and experienced consultants experienced with local government or municipal organization to create a strategic plan for the City through a comprehensive, data-driven, and community-engaged planning process, in accordance with the terms, conditions, and requirements set forth in this request for proposal ("RFP") document."*

Rowlett, Texas is a vibrant lakeside city nestled in both Dallas and Rockwall counties, just about 30 miles east of downtown Dallas. It's known for its scenic charm, strong community spirit, and rapid growth. Rowlett is home to nearly 68,000 residents and is a Home Rule City subject to the State of Texas laws, rules and regulations. Rowlett blends small-town warmth with big-city access, making it a standout choice for families, professionals, and lake lovers alike.

The Rowlett community isn't static, it's highly dynamic with lots of change. This is where convening members of the governing body along with the executive leadership team, and members of the community (optional), in a process to determine organizational priorities into the foreseeable future is beneficial. An effective and robust process will fortify relationships, clarify roles, increase a shared understanding about the future of Rowlett, serve to prioritize services and resources, and determine the best path forward in the collective quest to deliver high quality public services.

In brief, the process shall include gathering input from the public, staff and elected officials, facilitating the input (i.e. information gathering) process, assisting the City with evaluating the top themes gathered from that input, facilitating group meetings to identify the City's top strategic priorities, developing and finalizing a strategic plan document.

There are several purposes for undertaking this process:

- *Increased effectiveness.* The City's performance is enhanced, the mission is furthered, mandates are met, values are honored, and real public value is created. In addition, local government responds effectively and plans for rapidly changing circumstances.
- *Increased efficiency.* The same or better results are achieved with fewer resources.
- *Improved understanding and better learning.* The city understands its situation far more clearly. Leaders are able to re-conceptualize the situation and establish an interpretive framework that can guide strategy development and implementation.

- *Better decision making.* A coherent, focused and prudent basis for decision making is established, and today's decisions are made in light of their future consequences.
- *Enhanced organizational capabilities.* Broadly based organizational leadership is improved, and the capacity for further strategic thought, action and learning is enhanced.

Creating a shared understanding about the future of Rowlett and activating a path towards its realization is the ultimate outcome. Moreover, for any organization, the ability to concurrently run the business (i.e., government is in the business of public service) and reinventing it has become a determinant of long-term success.

2. Our Approach to Strategic Planning

We honor the history and heritage of a community and tailor our approach according to what best suits their needs. Our role during the process is to serve as a “flashlight” and a “mirror” helping City officials identify the impacts of trends on the vitality of the community, incorporate feedback from the various sources into themes, share how other municipalities are addressing similar issues/challenges and helping craft a Strategic Plan that achieves Cohesion among elected officials and staff, Clarity about priorities and Commitment to implementation. We pride ourselves on the ability to effectively disrupt the status quo thinking of the “we’ve always done it that way” approach and replace it with a forward-looking mindset on how community leaders can realize their community’s potential.

Strategic planning is crucial because it helps to create a long-term vision, allocate resources effectively, and respond to changing needs and circumstances. Here are some key reasons why local governments pursue strategic planning:

- 1) Vision and Direction: Strategic planning allows local governments to define clear goals and objectives. This helps to provide direction and a sense of purpose, ensuring that all efforts are aligned with the community's long-term vision.
- 2) Resource Allocation: By identifying priorities and setting goals, strategic planning helps local governments to allocate resources—such as budgets, personnel, and infrastructure—more effectively. This ensures that funds are directed towards the most critical areas and that resources are used efficiently.
- 3) Community Engagement: Strategic planning involves input from various stakeholders, including residents, businesses, and community organizations. This engagement fosters a sense of ownership and collaboration, leading to more inclusive and well-informed decision-making.
- 4) Adaptability: A strategic plan provides a framework for local governments to respond to changes and unforeseen challenges, such as economic shifts, natural disasters, or demographic trends. It allows for flexibility and adaptability while maintaining focus on long-term goals.

- 5) Performance Measurement: Strategic planning includes setting measurable objectives and key performance indicators (KPIs). This enables local governments to track progress, evaluate outcomes, and make data-driven decisions to improve performance over time.
- 6) Accountability and Transparency: Strategic planning promotes transparency by clearly communicating the goals, priorities, and progress to the public. It also holds elected and appointed officials accountable for achieving the objectives set out in the plan.

Overall, strategic planning helps local governments to be proactive rather than reactive, ensuring that they are better equipped to meet the needs of their communities and achieve long-term success.

Increasingly, local governments are reconsidering their approach to strategic planning by referencing the following shift in mindset:

Old Mindset	Modern Mindset
• Adoption of the plan is strategy. • Deficit closing strategy. • Change is dangerous. • An event. • Wish list – the longer the better. • Arithmetic - sequential • Assumption that existing advantages will persist. • Community is static. • Conversations that reinforce existing perspectives. • Precise but slow. • Prediction oriented. • Extending a trajectory	• Execution of the strategy. • Capitalize on strengths. • Stability is dangerous. • A process. • Prioritize list – less is more. • Calculus – lots of moving parts • Assumption that existing advantages will come under pressure. • Community is dynamic. • Conversations that candidly question the status quo. • Fast and roughly right • Discovery driven. • Promoting continual shifts

Strategic thinking requires looking forward critically at how future events could potentially impact the community and how the community's leaders should prepare for and address future challenges when they occur.

3. Work Plan

The Mejorando Group is uniquely qualified to provide professional facilitation services for the City of Rowlett. Our approach and accompanying work plan in developing the strategic plan satisfies the criteria by which successful strategic planning efforts are evaluated, and the city is seeking:

- Evaluates current conditions to identify opportunities to maximize and potential issues to mitigate.

- Leads to action that is both innovative and effective.
- It is an inclusive, participatory process (including obtaining input from citizens) in which elected officials and City staff take on a shared ownership role.
- Establishes Vision and Mission statements.
- Goals for the time frame identified.
- Measurable objectives for each goal.
- Implementation plan that includes timelines and group or individual assignments.

Our **Work Plan/Methodology** is comprised of Five Phases:



1. Engage – Initiate Process

The purpose is to address several critical questions prior to launching the process including:

- Initiate Project:** The Mejorando Group will begin with a meeting with the City Administrator to ensure that we have a clear understanding of the objectives. During this meeting the work plan and schedule will be finalized.
- Role of the Mejorando Group.** We are experts at striking a healthy balance between our two roles: content and process. Based on our in-depth experience in local government and our extensive record of consulting with governments we will provide substantive content to City leaders as they seek practical and imaginative solutions (i.e., content) to embed in the Strategic Plan. In regard to the process, we are well-versed in all facets of strategic planning including effective ways to guide groups through the various phases and facilitating meetings of both internal and external stakeholders and preparing summaries for review leading to the adoption of an overall Strategic Plan.

Based on the specific strategic planning needs of the City of Rowlett and the scope of work, a high-quality team of seasoned consultants would be assembled. This team will be led

by Patrick Ibarra and include Kim Newcomer of Slate Communications. Kim combines a deep background in local government communications and marketing with expertise in designing contemporary approaches to strategic planning for municipalities.

Each of our team members possesses significant local government experience, serving in senior leadership and management positions, and we blend this with excellent client-relations skills, strong analytical capabilities, being well-versed in offering leading edge solutions, and effective communication techniques which results in helping our clients move forward in all directions. Patrick will be the project manager and be responsible for actively participating in all facets of the project and Kim will focus her efforts primarily on creating and implementing the Community Outreach efforts.

- c) **Creation of Steering Committee (SC) - optional.** Steering Committees are beneficial in ensuring the timely creation of a Strategic Plan. Most recently, with the cities of Lake Forest (IL) and Mooresville (NC), a select group of the City Manager and several department directors were assembled to serve as the Steering Committee. Currently, in the City of Bismarck (ND) a group including one City Commissioner, Assistant City Administrator and several department directors comprise their SC. A discussion with the City Manager will take place about the value of the Steering Committee brings to the Strategic Planning process.
- d) **Identify resource materials for the Steering Committee (SC).** Gain consensus on what documents SC members should become familiar with as the project ensues. The purpose is to discover the issues that confront the community, see where they overlap, and address them concurrently.

2. Enlist - Obtain Input

A Launch/Kick-Off Meeting with Mayor Winget and the City Council and members of the City's Executive Leadership Team will be held. The purpose of this kick-off meeting is to enlist the participation of these key stakeholders in the strategic planning process.

Essential to ensure the content of the Strategic Planning process is aligned with the expectations of the governing body, **individual interviews/meeting** will be held with each member. The purpose of each one-on-one meeting is to elicit their perspectives about a variety of issues that will/may serve as the focus of the strategic planning process, specifically their expectations and opinions about what he/she would like to be accomplished.

The same process – interview(s) - will be replicated with the City Manager, Assistant City Manager, Deputy City Manager and department directors - to obtain their perspective about a variety of issues that will/may serve as the focus of the strategic planning process. Interviews with key stakeholders will reveal opinions, facts, experiences, beliefs, history, and more. Most important, interviews reveal what members are concerned about. Evoking, addressing, and highlighting these concerns is a requirement for strategic planning to be effective.

Specific questions may include:

- What are the desired outcomes from pursuing the creation of a Strategic Plan?

- What are the Strengths and Opportunities for improvement?
- What community-related topics/subjects need to be addressed in the near, short- and long-term?
- How will success of this process affect the organization and community?
- What do you want to achieve the end of the advance/retreat?

Relying on the “participation breeds commitment” approach the intent is for each elected official and all city employees to “have skin in the game” about the success of the actual strategic planning process.

Employee focus groups will also be facilitated. Input from employees can be extremely valuable. Here's a breakdown of the key benefits resulting from gathering input from employees: uncovering operational insights about core services, generating ideas and innovation, enhancing support and advocacy, challenging leadership assumptions, and strengthening internal workplace culture.

The following services are Optional. As stated in the RFP, public input is not being obtained.

Community involvement and stakeholder engagement are critical to developing an effective Strategic Plan. An understanding of community priorities, challenges, needs, and concerns provides the necessary foundation to ensure all segments of the City of Rowlett are working toward the same goals.

Successful engagement must be designed to meet the needs of the community. We will invest the time to understand what has been successful in Rowlett in the past and then add our own experience and best practices to the plan. Three principles guide our efforts:

- Meet people where they are – both online and in-person – to make engagement easy and accessible.
- Segment and target outreach to ensure that we gather a wide variety of perspectives from across the community. This requires using various tools from social media and digital platforms to print collateral and in-person discussions.
- Consistent communication and progress reports help build buy-in to the plan document and the work needed to implement.

Consequently, we will partner with City staff members assigned to Public Information and social media to **craft a Communications/Community Outreach Plan**. The Communication Plan developed will enlist as many residents and other external stakeholders as possible and obtain significant input from these same sources. The Mejorando Group is recommending the **inclusion of a segment on the City's [website](#)**. The use of social media, primarily [Facebook](#) is becoming increasingly important for local governments to establish and reinforce their “social currency” with citizens. **Either in-person or held virtually, we have experience facilitating in both formats, “Community Conversations”** in which members of the community are invited to attend and participate in focus group meetings will also be scheduled. A great advantage of strategic planning is that it can be used to engage the entire community and create enthusiasm for the future.

An online questionnaire may also be administered to obtain community input. Please refer to a [strategic planning](#) process we completed in 2022 with the City of Bartlesville, Oklahoma to review our approach in particular to the [Community survey](#) of residents. The effort included extensive community outreach including a branding process to distinguish the approach:



3. Examine the Present and Future by conducting a Situation Analysis

The intent of Phase 3 is to examine the potential impact resulting from emerging trends on the community and organization. While trends can't be fixed per se, it's vital to acknowledge their possible influence. In particular, it will help make the distinction between problems that can be fixed and those which can only be addressed.

There are two aspects of the **Situation Analysis** - an Environmental Scan and resulting SWOC (Strengths, Weaknesses, Opportunities, and Challenges) determination.

A. Environmental Scan: An environmental scan is an inventory of the political, technological, social, legal, socio-cultural and economic forces that influence the way the City operates. It will include an analysis of the current environment and the trends that may affect it. In examining various trends, at least three categories will be explored: Emerging Trends, Existing Trends and Disappearing Trends. Some examples of trends and forces to assess may include:

- ☒ What are the relevant population trends for the next two to five years? Five to 10 years?
- ☒ What is our direction and response to these shifts?
- ☒ How can we be responsive and proactive?
- ☒ How will we enlist residents on our journey? What is our interpretation of the feedback received via the community meetings and social media?
- ☒ What types of services will residents require in the future that are not already provided? What might be required to fund and staff these services?
- ☒ How will we describe our desired results in measurable terms?
- ☒ What types of infrastructure additions or expansions will be required to handle our anticipated growth? What financial resources are required to fund this work?
- ☒ How reliable are funding sources?

B. SWOC (Strengths, Weaknesses, Opportunities, and Challenges) Analysis: After thoroughly analyzing the environment, Steering Committee members will undertake a SWOC Analysis. The SWOC technique, a simple and effective tool for collecting information, helps focus the process by dividing it into four broad categories:

- S - Determine the organization's internal **Strengths** to include identification of the City's distinctive competencies (those abilities that enable the city to perform well against key performance indicators).
- W - Identify and describe the organization's internal **Weaknesses** and options to minimize or overcome each.
- O - Identify and describe the organization's **Opportunities** and options to take advantage of each.
- C - Identify and describe the organization's **Challenges** and options to overcome each.

The end product of this discussion will result in the identification of strategic issues – the fundamental challenges that affect City mandates, its mission and values, its service level and mix, its costs, its financing, its structure, its processes and its management. The Steering Committee will then create a draft master list of strategic issues. The draft list will be reviewed a bit later in the process before being finalized.

The process recommended to conduct the Situation Analysis is:

1. Obtain input via interviews of key stakeholders and City employees.
2. Convene the Steering Committee to review an aggregated summary prepared by the Mejorando Group of input gathered in Step 1. The Steering Committee will review the Summary and participate in their own version of a Situation Analysis by completing the Environmental Scan and SWOC Analysis.

Subsequent to session, a **Deliverable** will be prepared - a clear description of the organization's internal capacities (strengths and weaknesses) and of the external forces that will likely have an impact on its ability to seize future opportunities – as a written summary and will be provided to the governing body and the executive leadership team (i.e. City Manager and department directors). The results of the Situation Analysis completed are the backdrop for the next Phase of the Strategic Planning process.

4. Explore – Create Components of the Strategic Plan

A. Create Vision, Mission and Values

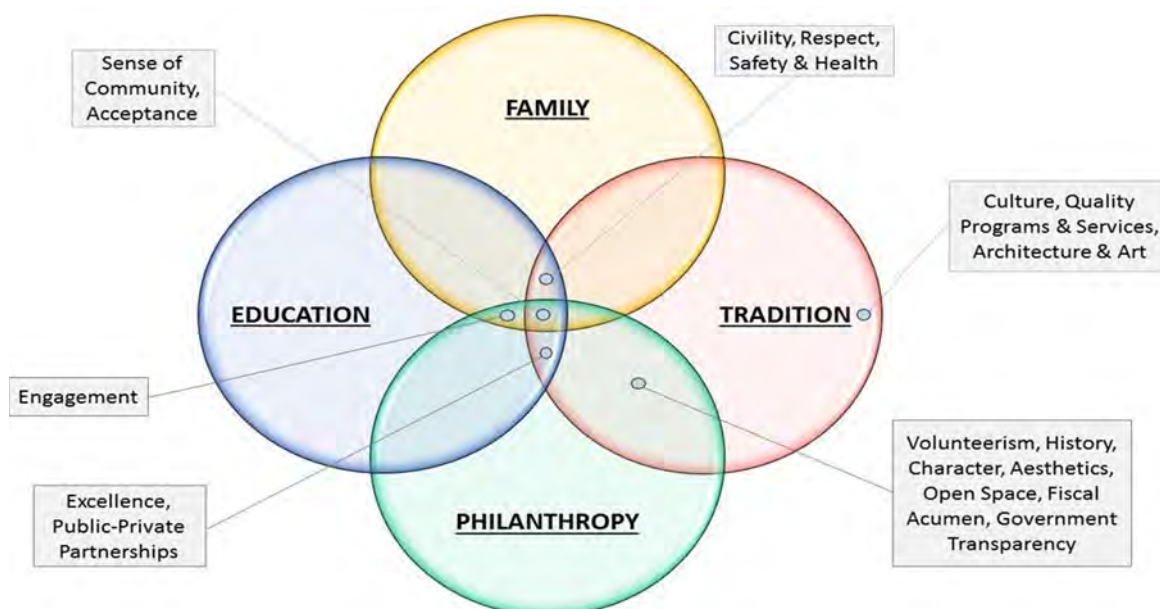
The outcome of the Situation Analysis provides the context necessary for establishing a Mission, Vision and set of Values. **This Phase will be completed by the Steering Committee participating in a session facilitated by Patrick Ibarra of the Mejorando Group.**

Step 1. Identify Core Values

The values of will provide the foundation on which the strategic plan is constructed. They are the basis for all decisions and actions. Provided as a reference for how another local government has approached creating Values, the following is from the City of Lake Forest, Illinois:

CORE VALUES: LAKE FOREST'S FOUR CORNERSTONES

FAMILY, EDUCATION, TRADITION & PHILANTHROPY



The Steering Committee will create a set of values which will provide the foundation on which the strategic plan is constructed. They are the basis for all decisions and actions.

Step 2. Establish the Vision

Vision statements reflect the collective understanding of the ideal situation. They may reflect a certain standard of living, the pleasantness of the environment, or the general vibrancy of the community. In local government strategic plans, the vision statement typically represents a view of the ideal community toward which the group is working.

The vision is a description of Rowlett's "desired future". In other words, where do the stakeholders believe the community will be in five to ten years? The emphasis is on the future as it describes the organization as the stakeholders would like it to become – in the future.

The following is an example of a recent Vision Statement created by one of our clients, [Town of Mooresville, North Carolina](#):



This sample is being provided simply for reference purposes.

The entire strategic plan starts with and must consistently relate to the vision statement. The ideal view of Rowlett sets the tone for the process and plan. It is important to recognize that because the vision reflects an ideal, it is unlikely that it will ever be fully and definitely achieved. The best vision statements for communities are broad without being so broad as to be common and are expressive of the ideal without being inane.

Step 3. Create the Mission Statement

The mission statement identifies the role of the city in pursuing the community's vision. Based on the values clarification and vision creation that occurred in the previous steps, the intent here is to verify the accuracy of the existing mission statement and make changes where needed. Other questions which will be answered that will help modify the existing mission statement are:

- What are the needs and wants of citizens?
- What challenges exist the mission must address?
- What are the needs and wants of business owners?
- What is the role of the city in mitigating risk and optimizing opportunity?

The basic question to address in the mission statement will be, "What is the business of the City of Rowlett and who do we serve?" An accurate description of the organization's purpose will drive the strategic plan. It will embody in a few words or sentences what Rowlett is. Why does it exist at all? What is its function? Who does it serve (customers or stakeholders)? The mission statement shall be crafted so it's clear, credible and understandable, flexible but focused, and brief.

A well-worked-out mission statement provides everyone involved with a sense of purpose, direction, significance, and achievement. In short, it will communicate the purpose of the City of Rowlett organization to the community. The Steering Committee will craft a Mission Statement to ensure that it propels the vision forward.

Again, a sample is provided simply as a reference point – [City of Bartlesville, Oklahoma](#):



Ongoing Communication and Validation

Subsequent to the adoption of the Mission, Vision and Values, we recommend they be shared with the various stakeholders as a means to obtain feedback. Concise summaries, social media outreach, and updates online will all play an essential role to ensure credibility, throughout the entire process.

B. Develop Strategic Areas of Focus and Goals

The outcome of adopting a Mission, Vision and Values provides the context necessary for creating the Goals and Objectives along with Action Plans enabling their achievement. This **Phase will be completed by the Steering Committee participating in a session facilitated by Patrick Ibarra of the Mejorando Group.**

In cities of any size, there are dozens or hundreds of competing and often conflicting priorities. The discipline of honing priorities down to a handful can force leaders to surface, discuss, and make a call on the most consequential trade-offs the organization faces in the next few years. When leaders make hard calls and communicate them, they provide clear guidance on the contentious issues likely to arise when executing strategy. But making trade-offs among competing priorities is difficult — they are dubbed “tough calls” for a reason.

This phase encourages Steering Committee members to expand their imaginations and envision a wider range of possible futures and consequently, be much better positioned to take advantage of the unexpected opportunities that will come along. Discussions about the various ways the City’s potential can be realized will include a blend of practicality and imagination. In particular for each Strategic Area of Focus the various goals, department action plans and desired schedule for progress and/or completion as determined by Steering Committee members.

The emphasis of these discussions will revolve around the existing strategic areas of focus, goals and objectives. What progress has been realized for each goal since the Strategic Plan was adopted? How relevant is it going forward? What’s not in the current Strategic Plan that should be considered?

Additionally, the Steering Committee will evaluate the master list of strategic issues created earlier this process and explore the role of the City in addressing them. In these discussions, they will:

- Describe why each subject is an issue and how it relates to organizational strengths, weaknesses, opportunities, challenges, mission and mandates.
- Compare and contrast issues as operational versus strategic.
- Identify consequences of not addressing the issue.

Setting Strategic Priority Areas (SPAs)

The adoption of Strategic Priority Areas accompanied by Goals will allow the city to accomplish the mission and advance the vision. Essentially, the setting of Goals and Objectives will serve to manage the gap between the present and desired future (i.e., the Vision) by defining where the city wants to be and establishing the steps needed for the desired outcome.

Strategic Priority Areas are typically in place for several years. What differs from year to year are specific objectives which support the successful execution of the strategic initiatives.

A sample of Strategic Priority Areas from one of our clients, the City of Durango, Colorado:



Goals usually address both short and long-term areas. Goals, then, are generalized statements of where the city wants to be at some point in the future.

Here is a sample of Goals and Objectives as set by the City of Lake Forest during their recent Strategic Plan revision:

OBJECTIVE ONE: Continue to utilize the annual five-year Capital Improvement Program Plan as a budgeting and prioritization tool for all City infrastructure, assets, and facility-related improvement, enhancement, and replacement projects.

Initiatives:

- Provide funding for studies of infrastructure, assets, and facilities to assist in prioritizing and forecasting costs related to future needs and to minimize accelerating expenditures resulting from the deferred maintenance.
- Develop a forward looking and ongoing assessment and evaluation process for City facilities, parking lots, bike and walking paths, and parks.
- Recognize that the cost of supporting infrastructure and facilities will likely continue to outpace available dollars. Continue to explore grant opportunities, public/private partnerships, and other outside funding sources to help finance priority projects and special initiatives desired by the community.
- Continue to use funding targets to assure that available dollars are allocated to a wide range of infrastructure and facility needs including, but not limited to roads, bridges, buildings/facilities, ravines, storm sewers, water and sanitary systems, operating equipment and vehicles.



The number of goals the Steering Committee determines cannot be predicted. Strategic plans may concentrate on four or five goals, or they may list dozens of areas that will component parts

of the focus for the city during the next several years. The plan must consist of what the Steering Committee feels comfortable with and believes the city can implement over time.

Each of the goal statements in the strategic plan will be followed by one or more objectives. There is no set number of objectives that are appropriate for each goal. Some goal statements may have few objectives attached to them, while some goal statements could have 10 or more objectives.

Operationalizing the Goals into action through objectives, accompanied by various performance measures will be addressed by the Council with assistance from City staff. Performance management in the public sector is an ongoing, systematic approach to improving results through evidence-based decision making, continuous organizational learning, and a focus on accountability for performance. Performance management is integrated into all aspects of an organization's management and policy-making processes, transforming an organization's practices so it is focused on achieving improved results for the public. Better information enables elected officials and managers to recognize success, identify problem areas, and respond with appropriate actions – to learn from experience and apply that knowledge to better serve the public.

Factoring in the notion that this undertaking is the City's inaugural Strategic Plan, it is essential to recognize that adopting performance measures will likely be an iterative process that may require a few years of implementing the goals. Our past experience with other local governments has revealed that a level of staff proficiency is necessary to adopt and execute meaningful performance measures.

Our role during this segment, as has been through all phases, is to facilitate thoughtful and productive discussions grounded in reality and pragmatism mixed with offering content from our experience partnering with local governments around the nation and how they are addressing similar issues. Far from a "cut and paste" approach, we respect the heritage and history of Rowlett and tailor our approach to ensure its compatible with your preferences.

A Draft Strategic Plan (deliverable) will be created and include:

- Results of the Situation Analysis SWOC Analysis and Environmental Scan
- Summary of public input
- Values
- Vision
- Mission Statement
- Strategic Areas of Focus
- Goals and Objectives
- Implementation Schedule

5. Execute the Strategic Plan

The Meiorando Group, in consultation with the City Manager, will convene to review comments/feedback from the governing body and collaborate on making any revisions and

adjustments to the Draft Report and culminate in the Council adopting the Final version of the Strategic Plan (deliverable).

Sharing the final results of the Strategic Planning process is an opportunity for elected officials, City staff, residents, businesses, community leaders and stakeholders to celebrate the effort and set sight on the future. Creative design of the [Strategic Plan](#), [animated explanatory videos](#), and an overall [presentation](#) that matches the City of Rowlett brand (i.e. reputation) can help the community quickly understand the final product. The following are samples from four of our clients:



Once adopted, execution of the Strategic Plan will commence and it is recommended at least quarterly updates be provided on the status of goals, to the governing body and community.

Overall, the strategic planning process will be a disciplined effort by Steering Committee members that builds on past efforts, captures a compelling vision, creates a modern mission, foundational values, produces goals, and actions that will enhance the present and future of Rowlett. The Mejorado Group approach is focused on achieving the outcomes expected: to create a strategic

plan that enables decision-making to be consistent with the desired outcomes. With a Strategic Plan in place, Rowlett will be poised for continued success, now and in the future.

4. Approach to Facilitation

Taking control of uncertainty and successfully steering the organization and community through frequent bends in the road is the fundamental leadership challenge of our time. And it will call for a distinctly different type of leadership than traditionally expected. The advantage now goes to those who don't just learn to live with change, but who create change and fashion themselves as catalysts. The most effective leaders anticipate where their community is headed and see changes before others do.

The benefits of our approach to successful strategic planning are to address the key ingredients:

- **Council management** – Is a springboard for helping the governing body be intentional, purposeful, and deliberate.
- **Group Relationships** – Strengthen the relationships among members.
- **Goals and Objectives** – Are a plan for what to do.
- **Decision aid** – Serves as a guide for making tough decisions in difficult situations such as where to invest energy, where to invest capital, and how to adjust to a rapidly changing environment.
- **Inspiration** – Acts as a tool for generating organization and community motivation and excitement.

As a **former city manager** who invested over fifteen years in local government management, and consultant for over twenty-three years collaborating with leaders of public-sector agencies nationwide, I consider myself extremely effective as a catalyst partnering with groups by utilizing my in-depth understanding about local government operations with a highly interactive, stimulating, and practical approach to group facilitation. The result is a group recommitted to tackling, with a laser-like focus, today's toughest challenges confronting local government leaders.

Beyond meeting facilitation, I bring expertise partnering with city managers and elected officials in navigating team building/group development and priority-setting processes – blending a productive process with valuable and contemporary insight on how local governments nationwide are leveraging the headwinds of change into a tailwind.

We refer to the gatherings of elected and appointed officials we design and facilitate as an **Advance** as opposed to a retreat the commonly referred term applied to these types of meetings. Our work is aimed at helping governing bodies perform better while satisfying individual needs at the same time.

My role as **meeting facilitator** is an essential element to a successful process and achieving desired outcomes. These key skill sets reflect my philosophy and approach:

- ✓ Effective facilitation skills and meeting management
- ✓ Extensive knowledge of local government
- ✓ Add value during the discussion and throughout the process.

- ✓ Fair, objective, and impartial to all participants
- ✓ Stimulate and encourage discussion and creative ideas.

I will facilitate the meetings by utilizing an approach that encourages the full participation of attendees, creates a relaxed and productive meeting environment, and keeps the group on-track with accomplishing agreed upon objectives.

E. IMPLEMENTATION, MONITORING & REPORTING

As stated in our proposal, “execution is the strategy.” That being said, several clients of ours have adopted a mix of practices comprised of quantitative metrics, qualitative insights, and transparency.

For example, many cities will **reference the relevant item(s) from the Strategic Plan when presenting a staff report to their governing body**. While not every item presented at a City Council meeting is related to the Strategic Plan, those which are should be referenced as such.

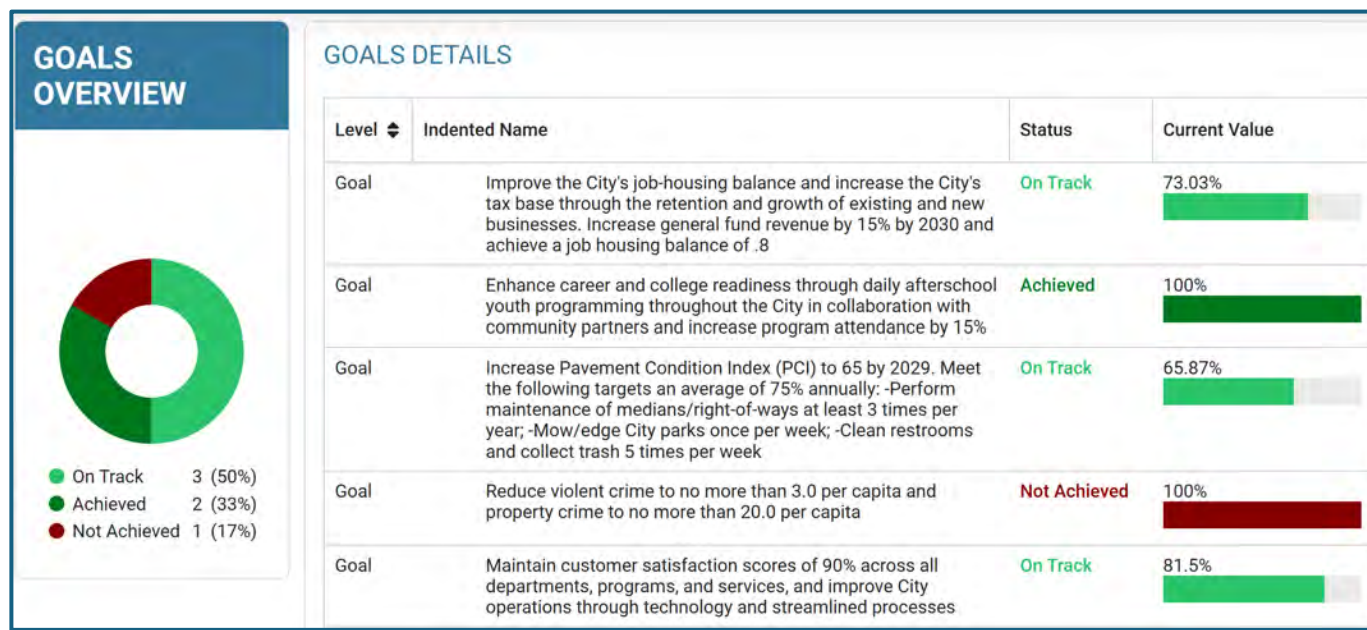
There is an agreed upon principle of “what gets measured gets done.” In addition to that approach, we believe that “what gets talked about gets done”; conversations are the oxygen of priorities. Therefore, **it is essential for the Strategic Plan to be fully integrated into the City’s “operating system” and serve as a decision-making guide for both the governing body and staff**.

Several of our clients engage our firm to facilitate **a biannual or annual review to assess where the city is on track, behind, or ahead**. Periodic check-ins are valuable to pause and determine what has been accomplished, what’s in the queue and permit new elected officials to actively engage in a refresh/update to the Strategic Plan.

Two specific examples from clients we would like to share include the City of Pittsburg, California which uses a live or regularly updated **performance dashboard to track progress**. This could be internal (for staff) or external (for public transparency).

[City of Pittsburg, California](#)





A second example is from the [City of Lake Forest, Illinois](#) which features a number of Objectives and Measures to support their various goals.

OBJECTIVE ONE: Continue to utilize the annual five-year Capital Improvement Program Plan as a budgeting and prioritization tool for all City infrastructure, assets, and facility-related improvement, enhancement, and replacement projects.

Initiatives:

- Provide funding for studies of infrastructure, assets, and facilities to assist in prioritizing and forecasting costs related to future needs and to minimize accelerating expenditures resulting from the deferred maintenance.
- Develop a forward looking and ongoing assessment and evaluation process for City facilities, parking lots, bike and walking paths, and parks.
- Recognize that the cost of supporting infrastructure and facilities will likely continue to outpace available dollars. Continue to explore grant opportunities, public/private partnerships, and other outside funding sources to help finance priority projects and special initiatives desired by the community.
- Continue to use funding targets to assure that available dollars are allocated to a wide range of infrastructure and facility needs including, but not limited to roads, bridges, buildings/facilities, ravines, storm sewers, water and sanitary systems, operating equipment and vehicles.



Our intent for the City of Rowlett is to partner with elected and appointed officials to develop a meaningful and practical approach to ensure the Strategic Plan is being successfully implemented and communicated in an effective manner.

F. PROJECT TIMELINE

The following schedule is a proposal for consideration. Based on additional input by the city, customization will ensue. The Mejorando Group has the resources to begin this project in August. We have provided a proposed project schedule that results in a Strategic Plan by, as per the RFP, December 1, 2025, assuming that all necessary information is made available to the Mejorando Group in a timely manner and that members of the city are available for meetings as needed by the schedule. We pride ourselves on our responsiveness to clients, and our proven track record in the ability to complete our projects on schedule and within budget and quality assurance/quality control.

Date	Activity
August	1. Engage – Initiate the Process
September	2. Enlist – Conduct interviews, gather input from employees and community (optional) and hold launch/kick-off meeting.
October	3. Examine – Design and facilitate with Steering Committee to complete Situational Analysis.
October/ November	4. Explore –Design and facilitate sessions with Steering Committee to: a. Create Mission, Vision and Values b. Develop Goals, Objectives and Implementation Schedule Present Draft Strategic Plan Prepare a draft of the Strategic Plan and present it to the Mayor and Winget at a work session for their review and discussion.
November	Review of Draft Strategic Plan and comments submitted to finalize Strategic Plan.
December	5. Execute : City Council adopts the Strategic Plan and implementation begins.

G. EXPERIENCE AND REFERENCES – THE MEJORANDO GROUP

City of Bismarck, North Dakota (pop. 75,077)

Currently providing Strategic Planning services for a community experiencing rapid growth. A Steering Committee comprised of both elected and appointed officials are convening to revise Vision, Mission, Values, Strategic Focus Areas and Goals. Expected to wrap up late Summer. **Reference:** Doug Wiles, Assistant City Administrator, 701-355-1303 dwiles@bismarcknd.gov Fee - \$26,000.

City of Lake Forest, Illinois (pop. 19,253)

In 2024, we designed and facilitated a revision to the existing strategic plan. A Steering Committee of city staff oversaw the process. Extensive public outreach sessions were held to refresh and slightly reset the focus for the governing body as they pursue the community's future. Mission and vision were reaffirmed, goals were adjusted and new objectives were included in the revised [Strategic Plan](#). **Reference:** George Issakoo, Assistant City Manager, (847) 810-3680 issakoog@cityoflakeforest.com Fee - \$46,200.

City of Kingsburg, California (pop. 12,662)

In 2023, we designed and facilitated a revision to the existing Strategic Plan. The processes involved developing a vision statement, mission for the organization, set of values, multi-year goals, strategies to achieve the goals, and preparation of an implementation action plan. Stakeholder input was gathered from various sources including members of the governing body, employees, management staff and the public. The process resulted in a revised [Strategic Plan](#) which reflects the community's aspirational focus of moving forward in all directions. **Reference:** Alex Henderson, City Manager, ahenderson@cityofkingsburg-ca.gov, (559) 897-5821. Fee - \$20,600.

City of Mooresville, North Carolina (pop. 53,721)

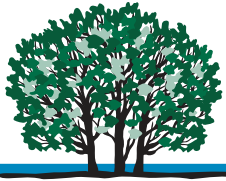
In mid-20024, significant turnover among the five-member governing body and a recently appointed Town Manager prompted the creation of a Strategic Plan for a rapidly growing community. A Steering Committee comprised of Town staff was established. The processes involved developing a vision statement, mission for the organization, set of values, multi-year goals, strategies to achieve the goals, and preparation of an implementation action plan. Stakeholder input was gathered from various sources including members of the Commission, employees, staff and the public. The [Strategic Plan](#) was adopted by the Town Commission. **Reference:** Tracey Jerome, Town Manager, tjerome@moorevillenc.gov, 704-663-3800 Fee - \$72,500.

City of Durango, Colorado (pop. 18,588)

In 2021, designed and facilitated a Strategic Planning process, including community outreach to clarify direction and prioritize initiatives to accelerate the transition of a newly appointed city manager. Facilitated annual updates each year since resulting in the existing [Strategic Plan](#). **Reference:** Jose Madrigal, jose.madrigal@durangogov.org City Manager, 970.375.5009. Fee - \$25,000.

City of Bartlesville, Oklahoma (pop. 36,412)

In 2022, designed and facilitated the city's inaugural strategic plan. Extensive community outreach was a high priority including an online questionnaire and "community conversations" (i.e., focus groups). The [Strategic Plan](#), currently being implemented, includes a Vision, Values and Mission accompanied by goals, objectives and a schedule. **Reference:** Mike Bailey, City Manager, (918) 338-4282 mlbailey@cityofbartlesville.org. Fee - \$65,000



THE CITY OF
LAKE FOREST
CHARTERED 1861



2025-2030 Strategic Plan



Priority Areas



FISCAL STEWARDSHIP

Implement an operating budget and capital improvement strategy that is balanced over the long-term.



INFRASTRUCTURE & CITY FACILITIES

Invest in and maintain infrastructure and facilities to ensure they are safe, reliable, and capable of meeting current and future needs of the community.



PUBLIC SAFETY

Ensure the safety and security of all residents by providing efficient and effective police, fire, and emergency services while promoting community-based crime prevention initiatives.



RECREATION AND COMMUNITY WELL-BEING

Promote a healthy and active community by providing diverse recreational opportunities, maintaining parks and open spaces, and supporting programs that enhance residents' quality of life.



COMMUNITY'S VISUAL CHARACTER AND DEVELOPMENT

Enhance the aesthetic appeal of Lake Forest by balancing preservation of historic buildings, distinct streetscapes and landscapes with being open to opportunities and new ideas.



BUSINESS & ECONOMIC VITALITY

Enhance the business community so that it remains economically viable, enticing to visit, and meets the needs of the community and visitors.



COMMUNITY ENGAGEMENT

Encourage active participation and communication between the City government and residents, fostering a sense of community and ensuring that voices are heard in the decision-making process.



2025-2030 Strategic Plan

The City of Lake Forest has a long history of Strategic Planning, beginning in the early 1990's and with the most recent plan that ran from 2017-2020. Due to the extended challenges presented during the Covid-19 pandemic, and the changing dynamics and priorities of the community, the new strategic planning process was postponed until the Community-Wide Survey was conducted in 2023.

The 2025-2030 Strategic Plan represents a community-wide effort that reaffirms the mission, vision and values established through previous Strategic Planning processes, but also takes a balanced approach to looking into the future.

It is a refreshed look at the City's strategic priorities, incorporating feedback collected through the Community-Wide Survey, focus group discussions with community leaders and stakeholders, public engagement feedback sessions, and online surveys.

Strategic Planning Process



Reaffirmed Mission, Vision and Values

Throughout the planning process, it was established that this new Strategic Plan will not be a reset, but rather a refreshed approach to the City's Strategic Plan. With that, it was established that the City's mission, vision and values would stay true and unchanged as they were developed in the past, honoring that work and commitment made by previous partners of the City's Strategic Planning Process.

MISSION STATEMENT

“Be the best-managed, fiscally-responsible and appealing community and promote a community spirit of trust, respect and citizen involvement.”

VISION FOR THE CITY OF LAKE FOREST

The City will preserve its character and quality of life and be responsive to the changing needs of the residents in a fiscally responsible manner.

The City will be an outstanding example of a well-managed, planned community which protects and enhances its rich heritage, architecturally significant buildings, residential neighborhoods, natural resources, open spaces and recreational areas. The City will continue in its efforts to be a community of cultural diversity, and maintain a variety of residential options, including single and multi-family housing. The City will foster well-planned business districts, encompassing a variety of retail shops, restaurants and other service establishments.

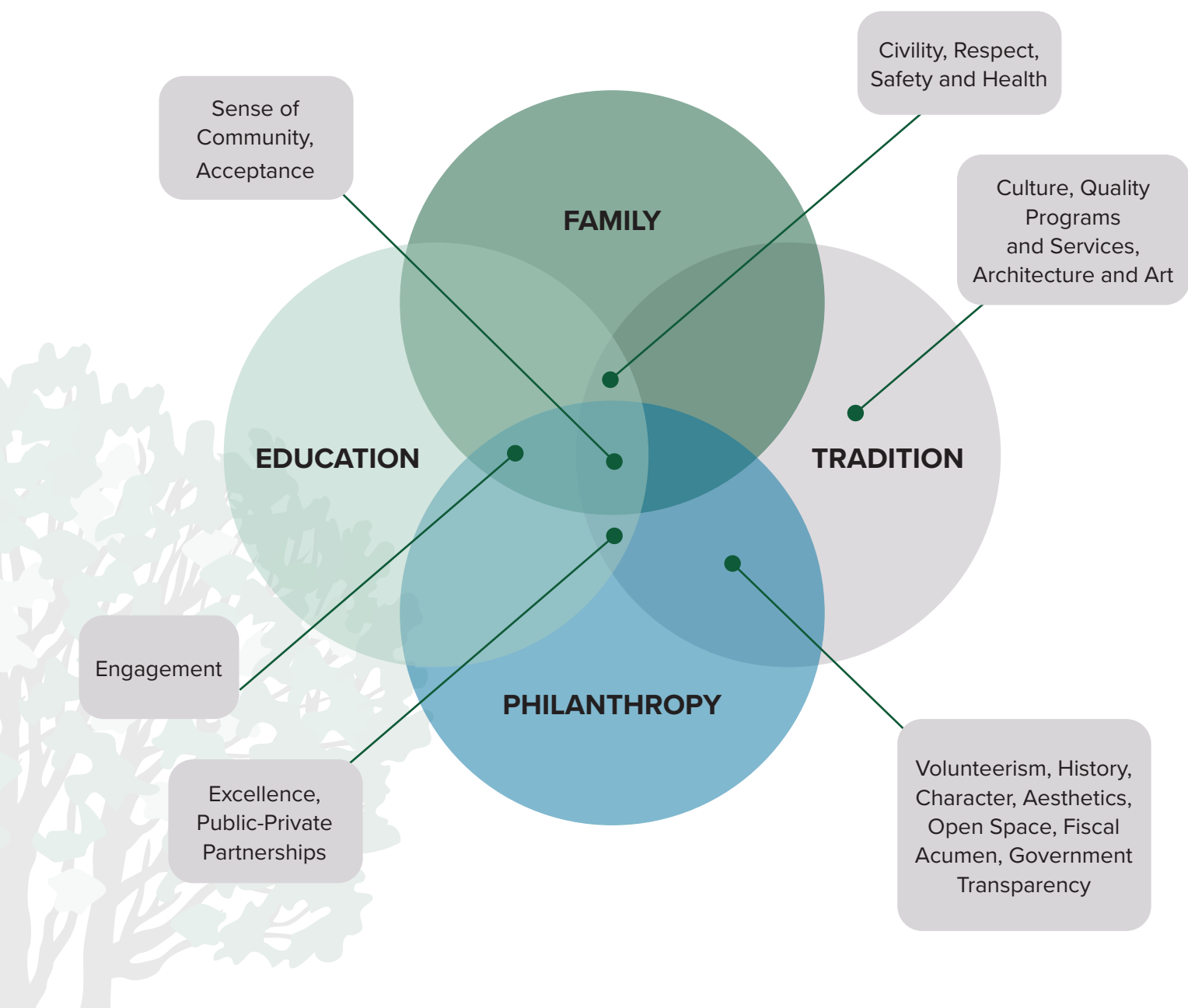
A strong commitment will be made to public health and safety, the maintenance of our infrastructure, and the conservation of our open spaces and natural resources. Community, educational and recreational services will be distinguished by a strong commitment to quality, efficiency and outstanding public facilities, supported by one of the North Shore's most reasonable property tax rates.

The City will be known for its responsiveness, commitment to public health and safety, sensitivity to quality of life and conservation, fiscal responsibility, and promotion of cooperation and respect among residents, businesses and government.



Core Values: Lake Forest's Four Cornerstones

Family, Education, Tradition, and Philanthropy



Fiscal Stewardship



Implement an operating budget and capital improvement strategy that is balanced over the long-term.

OBJECTIVE ONE: Implement an operating budget and capital improvement strategy that is balanced over the long-term.

Initiatives:

- Continue the tradition of considering the long-term time horizons that guide decision making when developing financial forecasts that predict future revenue and expenditure trends.
- Based on the financial forecasts developed annually, proactively take steps to address anticipated problems in a timely fashion.
- Identify potential internal and external challenges that may impact the City's ability to remain flexible and responsive in managing City finances.
- Retain and attract a high-quality workforce through competitive salaries, benefits, training, and development opportunities with an emphasis on succession planning.
- Explore opportunities for continuous improvements to the cost effectiveness and efficiency of City programs, activities, and services with particular focus on those identified by residents as being highly valued.



OBJECTIVE TWO: Continue to pursue alternative sources of revenue while thoughtfully reducing expenditures and exploring public and private partnerships and special service agreements, which have served the City well in the past.

Initiatives:

- Create a revenue diversification plan.
- Continue emphasis on pursuit of grant opportunities to supplement the City's Capital Improvement Program.
- Pursue consortiums and shared service agreement opportunities with neighboring municipalities to reduce expenditures.
- Further steward relationships between the City and community stakeholders to identify potential public/private partnerships to support capital projects, community events, and unique initiatives.
- Create opportunities for residents, family foundations, and businesses to make "legacy contributions" - donations for specific purposes or to support the General Fund.
- Explore opportunities to increase volunteer efforts to reduce City operational costs.



OBJECTIVE THREE: Ensure the public is well informed and understands the financial condition of the City and the proactive efforts to continue to keep the budget in balance.

Initiatives:

- Publicize the Comprehensive Fiscal Plan, cost-savings initiatives and staff reductions that have been implemented.
- Utilize multiple modes of media and communication to inform the community with an emphasis on presenting complex financial information in an easy-to-understand format.
- With the goals of both transparency and keeping residents informed, publicize monthly updates to track financial performance and deviations from projected budgets.

OBJECTIVE FOUR: Continue to actively encourage and support economic development.

Initiatives:

- Explore opportunities to create jobs, enhance economic diversification within the community, and promote income growth.
- Develop a dedicated Fund and/or revenue to allocate for business/economic development initiatives.
- Develop and implement options for incentive programs targeted toward sites, business types, or other development identified by City officials as essential to maintaining thriving business districts.



Infrastructure and City Facilities



Invest in and maintain infrastructure and facilities to ensure they are safe, reliable, and capable of meeting current and future needs of the community.

OBJECTIVE ONE: Continue to utilize the annual five-year Capital Improvement Program Plan as a budgeting and prioritization tool for all City infrastructure, assets, and facility-related improvement, enhancement, and replacement projects.

Initiatives:

- Provide funding for studies of infrastructure, assets, and facilities to assist in prioritizing and forecasting costs related to future needs and to minimize accelerating expenditures resulting from the deferred maintenance.
- Develop a forward looking and ongoing assessment and evaluation process for City facilities, parking lots, bike and walking paths, and parks.
- Recognize that the cost of supporting infrastructure and facilities will likely continue to outpace available dollars. Continue to explore grant opportunities, public/private partnerships, and other outside funding sources to help finance priority projects and special initiatives desired by the community.
- Continue to use funding targets to assure that available dollars are allocated to a wide range of infrastructure and facility needs including, but not limited to roads, bridges, buildings/facilities, ravines, storm sewers, water and sanitary systems, operating equipment and vehicles.



OBJECTIVE TWO: Identify and pursue road, sidewalk, and bike/pedestrian path improvements to promote mobility, safe and efficient movement of various transportation modes, and interconnectedness throughout the community.

Initiatives:

- Develop and implement an ongoing process to identify and prioritize future transportation enhancement projects throughout the City.
- Take steps necessary to advance and complete the intersection improvements at both Waukegan and Everett Roads and Waukegan and Westleigh Roads through partnership with IDOT.

OBJECTIVE THREE: Research, develop, and implement innovative and modern solutions for all City infrastructure repairs and improvements that promote efficiency, cost effectiveness, and environmental sustainability.

Initiatives:

- Continue to evaluate and implement new technologies, means, and methods to improve infrastructure in areas that may present both funding and construction challenges/limitations. These may include but are not limited to stormwater management, facility improvements, road resurfacing, parking lot replacement, and street lighting.
- Protect waterways and ravines by maintaining and improving storm water and sanitary infrastructure, and stream system health.
- Continue to explore opportunities to include features such as rain gardens, pervious pavement, and bioswales where appropriate in infrastructure projects.



Public Safety



Ensure the safety and security of all residents by providing efficient and effective police, fire, and emergency services while promoting community-based crime prevention initiatives.

OBJECTIVE ONE: Improve the effectiveness of joint police, fire, and emergency management response through enhanced coordination, integrated training programs, new protocols, and the development of best practices for critical incidents and planned events.

Initiatives:

- Ensure public safety agencies have the training, equipment and resources needed to deliver timely and effective services and develop ways to measure and report on the quality of those services.
- Continue joint efforts to plan for and respond to significant community safety events through combined training and utilization of emergency operation plans.
- Enhance the community's ability to prevent, protect against, mitigate, respond to, and recover from critical incidents and large-scale events.
- Evaluate and project major capital expenses to responsibly maintain a high level of service and response to emergencies.



OBJECTIVE TWO: In partnership with the community, professionally and efficiently deliver high-quality law enforcement services; foster a feeling of safety and security; and provide outreach and educational programs to enrich all persons in the City of Lake Forest.

Initiatives:

- Research and implement new training, technology, processes, facilities, and equipment that support the mission of the Police Department.
- Increase police department transparency through new tools and growing current practices.
- Continue efforts to support industry-leading police/community strategies that will support the community and strengthen public trust.
- Expand social services throughout the community by increasing the use of the police social worker and other crisis intervention programs.



OBJECTIVE THREE: Provide a safe environment through efficient and effective fire rescue and EMS services for the residents, businesses, and visitors.

Initiatives:

- Ensure the seamless operation and continual enhancement of fire rescue services, emergency medical services, life safety code enforcement, and 911 operations to advance public safety.
- Identify and adapt to public safety service models that support ever evolving changes in service delivery expectations and opportunities.
- Continue implementation of progressive fire and injury prevention activities (i.e. Citizen's Fire Academy, Risk Watch, Public Education Initiatives).
- Explore, implement, and integrate technological innovations and advancements.

OBJECTIVE FOUR: Plan for, design, and build updated police and fire headquarters facilities in a manner that is both fiscally responsible and meets the current and future needs of the community and our public safety employees.

Initiatives:

- Convert the vacant office building at 1925 Field Court to a new Police Headquarters.
- Explore various funding mechanisms, public/private partnerships, and other revenue streams to offset buildout and ongoing operational costs for the Police Headquarters.
- Develop a plan for renovation of the existing Public Safety Building to meet the needs of the Fire Department in the short term, and over the longer term.
- Assess the impact the new police headquarters location will have on law enforcement operations, Police-Fire cooperation, community relations, and other metrics and plan for and implement appropriate strategies.



Recreation and Community Well-Being



Promote a healthy and active community by providing diverse recreational opportunities, maintaining parks and open spaces, and supporting programs that enhance residents' quality of life.



OBJECTIVE ONE: Identify opportunities to enhance recreational programs and facilities to better serve the needs and interests of residents and to continue to attract new families to the community.

Initiatives:

- Identify opportunities to enhance existing offerings and develop new programs to meet the expressed needs and ever-changing interests of all community members.
- Begin to develop a long-term plan for the enhancing, renovating, or replacing the Recreation Center. Consider scope, timing, and financial strategies.

OBJECTIVE TWO: Offer community events and educational opportunities that address the diverse needs and interests of Lake Forest residents and increase the sense of community.

Initiatives:

- In addition to larger community events, support grass-roots initiatives for localized gatherings within subdivisions and neighborhoods to build community and strengthen neighbor to neighbor relationships.



OBJECTIVE THREE: Encourage and promote community use of the City's natural assets including neighborhood and community parks and preserved and protected natural areas.

Initiatives:

- Continue to maintain City parks and open spaces at a high level making them safe, comfortable, and inviting to residents.
- Evaluate opportunities to improve pedestrian (both walkers and runners) and bicycle access to parks and open spaces.
- Promote and celebrate the community's unique natural assets, the beach, parks, prairies, and woodlands.
- Provide information on regulations that apply to the use of parks, the beach, and preserved open spaces in order to enhance the experience for all residents.
- Continue to promote programs including the award-winning Rethink Recycle Program, use of the City's Compost & Recycling Center, curbside compost collection service, and the exploration of other environmentally friendly initiatives.
- Provide public education opportunities with the goal of increasing awareness of the benefits of protecting and preserving the extraordinary natural environment in the City.



OBJECTIVE FOUR: Create opportunities to partner with schools, the hospital, the Library, Gorton Center, religious institutions, and other not for profit groups to support the success and well-being of children, youth, seniors, and families.

Initiatives:

- Assure that the City organization, elected and appointed officials and City staff lead by example in accordance with the City's Values – Trust, Respect, Integrity and Excellence.
- Strive to create an environment of civility at public meetings by encouraging an openness to listening and understanding diverse points of view.
- Continue to support, promote, and enhance the services and programs offered by CROYA to respond to current interests and needs of the community's youth.
- Continue to support, promote, and enhance the services and programs provided by Dickinson Hall to respond to current interests and needs of the community's aging population.
- Cultivate partnerships with School Districts 67 and 115, community groups and organizations to enhance opportunities for collaboration and building trust while promoting physical and emotional well-being for all residents.
- Continue to hold events that provide opportunities for the Police Department, including the Department's Social Worker, to interact in a positive way with community members with a focus on providing opportunities for interactions with youth and seniors.
- Identify and promote resources that are available in the community through local and regional agencies that support physical and mental health awareness.

Community's Visual Character and Development



Enhance the aesthetic appeal of Lake Forest by balancing preservation of historic buildings, distinct streetscapes and landscapes with being open to opportunities and new ideas.

OBJECTIVE ONE: Maintain the established development review processes and public input opportunities which have historically served the community well.

Initiatives:

- Respect the decisions of the various Boards and Commissions, recognizing that each has a specific purview and charge and recognizing the Council's responsibility for taking a broader perspective.
- Evaluate proposals holistically: what is in the best interest of the entire community over the long term.
- Continue to adhere to the review processes that have served the City well for decades.



OBJECTIVE TWO: Recognize, respect, and preserve significant buildings, landscapes, and distinct streetscapes carrying on the tradition of actively working to preserve the community's unique character while at the same time, being open to development and redevelopment that introduces appropriate new ideas and opportunities.

Initiatives:

- Recognize and celebrate the historic and unique aspects of the community to raise awareness about and remind people of what makes the community special.
- Consider development and redevelopment plans in a careful and deliberate manner as has traditionally occurred in the community.
- Develop guiding parameters for "opportunity areas" that exist in the business districts to serve as a road map for developers who may have interest in Lake Forest and to set realistic expectations for all stakeholders.
- Avoid following "trends of the day" without careful due diligence about unintended consequences and impacts, positive or negative, on the community's character over the long term.



OBJECTIVE THREE: Support construction that is safe, durable, of high quality, and responsible.

Initiatives:

- Continually adopt updated National and State Life Safety and Building Codes.
- Review and reduce local Building and Life Safety Codes, relying on the well-researched State and National Codes to provide clarity and consistency for contractors and design professionals and to further streamline review processes.
- Evaluate new materials and methods that take advantage of new technology or are more environmentally responsible.
- Support quality development that will stand the test of time.

OBJECTIVE FOUR: Recognize the key role preserved open space, streetscapes, and well landscaped public spaces play in the community's visual character.

Initiatives:

- Continue to partner with Lake Forest Open Lands as the appropriate long-term use of the limited remaining vacant land in the community is considered.
- Consider appropriate lighting levels for different areas of the community to provide for comfort and safety while respecting the community's character.



Business and Economic Vitality



Enhance the business community so that it remains economically viable, enticing to visit, and meets the needs of the community and visitors.



OBJECTIVE ONE: Maintain a focus on the health and vibrancy of the Central Business District and the Waukegan Road/Settlers' Square Business District.

Initiatives:

- Maintain and upgrade essential infrastructure as needed to provide safe, functional, and welcoming business districts.
- Try out new ideas. Implement pilot projects that require minimal investment at the outset and observe community reaction, evaluate pros and cons.
- Continue to offer events to draw people, both residents and visitors, into both business districts.
- Welcome visitors by providing clear parking information through various means and provide adequate parking capacity in appropriate locations.
- Actively work to support existing and new businesses through initial site selection, an efficient and responsive development/redevelopment process, on site problem solving (in particular to support adaptive reuse of historic buildings), and as may be appropriate, considering unique incentives for exemplary projects.

OBJECTIVE TWO: Support a mix of uses in the business districts including retail (everyday necessities and specialty retail), a variety of restaurants at various price point, service businesses, residential options, and community gathering spaces, small and larger.

Initiatives:

- Welcome both national brands and local businesses.
- Promote shopping and eating locally.
- Implement the recommendations in the Comprehensive Plan pertaining to both business districts: develop parameters for “opportunity areas” and consider amendments to zoning regulations if needed to support the parameters.

OBJECTIVE THREE: Promote Conway Park locally, regionally and beyond as a premier office opportunity.

Initiatives:

- Engage with regional agencies to promote Conway Park.
- Evaluate the need for re-establishing a shuttle service from the train stations to Conway Park as an amenity for employees in collaboration with the Conway Park Owners’ Association. (Prior service was discontinued during Covid.)



Community Engagement



Encourage active participation and communication between the City government and residents, fostering a sense of community and ensuring that voices are heard in the decision-making process.

OBJECTIVE ONE: Increase the usefulness and accessibility of current communication channels, as highlighted in the Community-Wide Survey.

Initiatives:

- Utilize survey results on communication preferences to better understand demographic data and how best to focus on unreached groups.
- Identify the top five sources used by residents and explore how to best leverage those channels to continue to increase information retention.
- Reassess the lower utilized channels and work to better understand an appropriate reallocation of resources or reimagining of those tools.
- Be a trusted messenger for community information. Proactively anticipate and address questions.



OBJECTIVE TWO: Enhance access to community engagement opportunities for residents in all stages of life.

Initiatives:

- Clearly inform community members about how they can interact with the City and provide easily accessible ways to be involved.
- Organize regular meetings and forums to solicit feedback and foster dialogue between residents and City leadership.
- Continue using pulse surveys to gather feedback from residents on specific projects or initiatives.
- Increase use of intercept surveys as a tool to reach key stakeholder groups where they are at.

OBJECTIVE THREE: Enhance sense of community by encouraging communication and collaboration between community partners (schools, non-profit organizations, institutions, businesses, etc.)

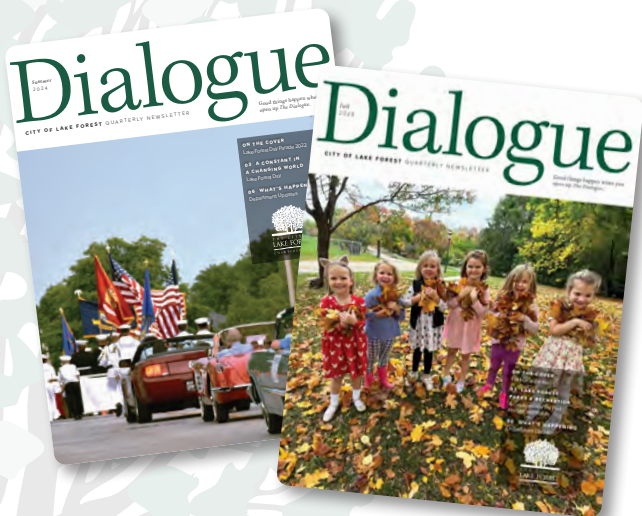
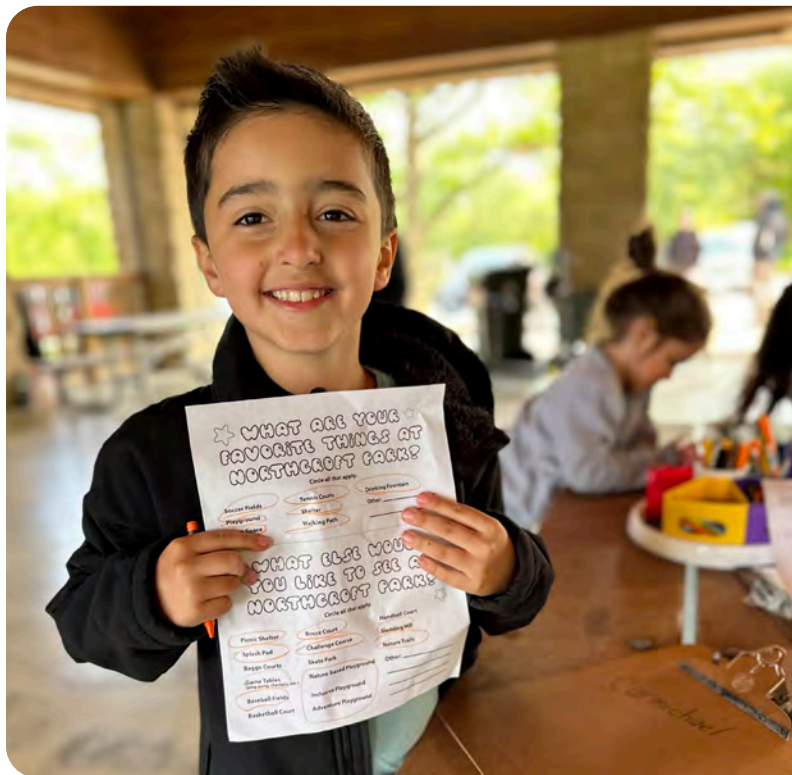
Initiatives:

- Facilitate events and opportunities to increase visibility for local businesses and organizations.
- Share information about volunteer opportunities.
- Foster strong relationships between the City and community organizations, businesses, and institutions.

OBJECTIVE FOUR: Continue to optimize openness in City decisions, actions, and decision-making processes.

Initiatives:

- Increase awareness of the City's transparency portal and access to City Council, Boards and Commissions activity and documentation.
- Through existing technologies, improve the City's transparency portal by providing a central location for publicly available information.
- Improve the user experience for watching live-streamed City Council Meetings.
- Utilize Agenda Management software to increase accessibility and synchronization between agenda management and recorded videos of City business.





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H. FEE SCHEDULE – THE MEJORANDO GROUP

Activity	Fee
1. Engage – Initiate the Process	\$ 3,500
2. Enlist – Conduct interviews, gather input and hold launch/kick-off meeting.	\$13,000
3. Examine – Design and facilitate with Steering Committee to complete Situational Analysis.	\$11,100 • Hourly services = \$6,000 • Full-day session = \$5,100
4. Explore –Design and facilitate sessions with Steering Committee to: a. Create Mission, Vision and Values b. Develop Goals, Objectives and Implementation Schedule Present Draft Strategic Plan Prepare a draft of the Strategic Plan and present it to the Mayor and Council at a work session for their review and discussion.	\$24,100 • Hourly services = \$8,800 • Three full-day sessions = \$15,300
Review of Draft Strategic Plan and comments submitted to finalize Strategic Plan.	\$3,500
5. Execute: Council adopts the Strategic Plan and implementation begins.	
Total Fee	\$55,200*

*Includes optional services for Community Outreach which totals \$7,000.

Travel reimbursement is in addition to the Fee.

I. 1. ADDITIONAL INFORMATION

The Mejorando Group
Sample Certificate of Insurance from a client.
If selected, a Certificate of Insurance would be prepared for the City of Rowlett.

ACORD®		CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY) 06/13/2025			
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 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 rights to the certificate holder in lieu of such endorsement(s).							
PRODUCER A J GALLAGHER RISK MGMT SVCS/PHS 83554656 The Hartford Business Service Center 3600 Wiseman Blvd San Antonio, TX 78251			CONTACT NAME: PHONE (888) 920-6259 FAX (A/C, No, Ext): E-MAIL ADDRESS:				
INSURED THE MEJORANDO GROUP 13 MUIRFIELD RD CUMBERLAND CENTER ME 04021			INSURER(S) AFFORDING COVERAGE INSURER A: Twin City Fire Insurance Company NAIC# 29459 INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:				
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	COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR ☒ General Liability	X	X	83 SBM AF3103	07/07/2024	07/07/2025	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						
GEN'L AGGREGATE LIMIT APPLIES PER: POLICY ☐ PRO-JECT ☒ LOC OTHER:					GENERAL AGGREGATE \$2,000,000	PRODUCTS - COMP/OP AGG \$2,000,000	
	AUTOMOBILE LIABILITY ☐ ANY AUTO ☐ ALL OWNED AUTOS ☐ HIRED AUTOS ☐ SCHEDULED AUTOS ☐ NON-OWNED AUTOS						COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)
	UMBRELLA LIAB EXCESS LIAB ☐ OCCUR CLAIMS-MADE DED RETENTION \$						EACH OCCURRENCE AGGREGATE
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A				PER STATUTE E.L. EACH ACCIDENT E.L. DISEASE -EA EMPLOYEE E.L. DISEASE - POLICY LIMIT
A	PROFESSIONAL LIABILITY			83 SBM AF3103	07/07/2024	07/07/2025	Occurrence \$1,000,000 Aggregate \$2,000,000
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) Those usual to the Insured's Operations.							
CERTIFICATE HOLDER City of Calabasas 601 CARMEN DR CAMARILLO CA 93010				CANCELLATION 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 <i>Susan F. Castaneda</i>			

ACORD 25 (2016/03)

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I. 2. EXCEPTIONS TO THE CONTRACT

No exceptions to the City's Standard Terms and Conditions of Procurement.

I. 3. PROPOSAL CERTIFICATION FORM

RFP 2025-166-B STRATEGIC PLANNING SERVICES PROPOSAL CERTIFICATION FORM

By submitting a proposal, the Consultant certifies that the Standard Terms and Conditions for Procurements, the RFP requirements, and all issued Addendums have been read and are fully understood, and it's the Consultant's intent to enter into negotiations for a contract for Strategic Planning Services. Consultant agrees to abide by the terms and statutory requirements governing the solicitation process.

All addenda shall be issued in written form by the Purchasing Office. The City is not bound by any oral representations, clarifications, or changes made in connection to the RFP by the City's employees, agents or consultants unless in the form of a properly issued Addendum.

The failure of the Consultant to contact the Owner to determine the issuance of any Addenda, or to acknowledge receipt of any and all of the Addenda issued in connection with this project, shall entitle the City, at its sole discretion, to (i) reject the proposal of the Consultant as being non-responsive, or (ii) to accept the proposal of the Consultant, in which event the Consultant agrees to be bound by all of the terms and conditions of each unacknowledged Addendum.

A. FIRM INFORMATION

Legal Name of Vendor: Patrick Ibarra, dba The Mejorando Group

Tax ID Number: Provided upon selection Telephone No: 925 518 0187

State of Formation: California

Year of Formation: 2002

Address: 13 Muirfield Road

Cumberland, Maine 04021

Contact Name and Title: Patrick Ibarra, Owner

Contact Phone No: 925 518 0187

Contact Email Address: patrick@gettingbetterallthetime.com

B. CERTIFICATION

I certify that I have the legal authority to bind the Consultant listed above, and I further certify that there are no objections to any of the terms and conditions listed in this RFP document, except as noted in Article VIII. Submittals, Section I. Additional Information, Item 2. (if applicable).

Patrick Ibarra

Signature of Authorized Representative:

Printed Name and Title of Authorized Representative: Patrick Ibarra, Owner

Date of Certification: 7/28/2025

Meeting Date: 1/5/2026

Agenda Item: 5.B.

Title

Receive Short Term Rental Subcommittee Report and Recommendations.

Staff Representative

Kristoff Bauer, Deputy City Mgr

Executive Summary

The Council appointed a subcommittee to consider revisions to the City's Short Term Rental (STR) regulations. Those recommendations will be presented for discussion by the City Council.

Strategic Priority and Goal(s)

Strategic Priority	Strategic Goal
 GOVERN TRANSPARENTLY & INCLUSIVELY	1.8 Provide accurate and timely information to policy-makers and the public.

Background Information

The Council discussed Short-Term Rentals (STRs) and Long-Term Rentals (LTRs) during a Council Work Session on September 15, 2025. The Mayor appointed a Council Subcommittee consisting of Councilmembers Reaves, Gibbs, and J. Bowers III. The Subcommittee has met and will bring forward their recommendations for consideration by the entire Council.

Discussion

The STR/LTR Council Subcommittee makes the following recommendations:

1. Limit STRs to one per every 1,000 feet
 - a. Current STRs to be “grandfathered” or rather legally non-conforming
 - b. City Attorney concerns regarding enforcement can be mitigate by operational procedures or ordinance changes
 - c. Condo buildings will allow no more than 2 STR units within one building
 - d. Consider exempting Sapphire Bay
2. Require placement of a plaque by front door
 - a. 24/7 contact (property owner or management company)

- b. Response within 1 hour of complaint (failure to respond a violation)
 - c. Link to City regulations
- 3. Conversion to LTR permitted after revocation of STR if all City LTR registration and inspection requirements met
- 4. Prohibit double bookings
- 5. Explore LTR detection and management software with cost recovery permit fee
- 6. Change sex offender registration requirement to a shorter period of stay
 - a. Place burden on property owner to prevent rental by sex offender within restricted areas

Financial/Budget Implications

N/A

Recommended Action

This item is for discussion only.

Attachments

None

Meeting Date: 1/5/2026

Agenda Item: 5.C.

Title

Presentation on Residential Lighting Standards and a Comparative Analysis and Code Review.

Staff Representative

Derek Hull, Director of Community Development

Executive Summary

The Rowlett Development Code (RDC), Section 77-510, provides general guidance for residential exterior lighting requirements. Community Development staff conducted a comparative analysis to ascertain the lighting standards of neighboring municipalities and will summarize findings and will provide proposed text amendments to the Code.

Strategic Priority and Goal(s)

Strategic Priority	Strategic Goal
 Strengthen Neighborhood Livability	3.1 Value existing neighborhoods. 3.2 Sustain a community that is appealing to people at all stages of life. 3.3 Invest in enjoyable places of lasting value and distinctive character. 3.4 Support efficient development patterns and communicate clear policy guidance. 3.5 Ensure that the Comprehensive Plan is observed and followed.

Background Information

Contained within RDC Section -77-510, entitled Exterior Lighting, the intent of the code section is to require outdoor lighting that is adequate for safety and convenience; in scale with the activities to be illuminated and its surroundings; directed to the surface or activity to be illuminated; and designed to clearly render people and objects and contribute to a pleasant nighttime environment.

Specific to residential lighting standards in Section 77-510 B 1 (b), the RDC states the following lighting standards are exempt for compliance: Soffit or wall-mounted luminaries that are permanently attached to single-family residential dwellings, not to exceed the height of the eave, and that do not produce glare onto adjacent properties or public streets. This is the extent of the RDC's summary of residential lighting standards.

Discussion

Staff will provide a presentation on the comparative analysis of lighting standards with neighboring municipalities.

Financial/Budget Implications

No impact.

Recommended Action

Provide staff direction on proposed code amendments regarding residential lighting standards.

Attachments

None