

A G E N D A I T E M

BUSINESS OF THE CITY COUNCIL City of Des Moines, WA

SUBJECT: City Strategic Plan & Facilitation Services- Professional Services Agreement with Raftelis

FOR AGENDA OF: July 10, 2025

DEPT. OF ORIGIN: City Manager

DATE SUBMITTED: June 12, 2025

ATTACHMENTS:

1. Professional Services Agreement between City of Des Moines & Raftelis
2. Scope of Work
3. Community Engagement and Outreach Plan

CLEARANCES:

- City Clerk _____
- Communications _____
- Community Development _____
- Courts _____
- Emergency Management _____
- Finance _____
- Human Resources _____
- Legal _____
- Marina _____
- Police _____
- Parks, Recreation & Senior Services _____
- Public Works _____

APPROVED BY CITY MANAGER

FOR SUBMITTAL: *Katherine Coffey*

Purpose and Recommendation

The purpose of this agenda item is to seek approval for the City Strategic Plan and Facilitation Services Professional Services Consultant Agreement and Scope of Work (Attach. 1 & 2) with Raftelis. The following motion will be appear on New Business.

Suggestion Motion:

Motion 1: “I move to approve the Professional Services Consultant Agreement with Raftelis for the City Strategic Plan and Facilitation Services in the amount of \$74,900, and further authorize the City Manager to sign said Contract substantially in the form as submitted.”

Background

During the City Manager's Report at the June 12, 2025 meeting, the City Manager provided the City Council with an update on the Strategic Plan and Facilitation process. Staff recommended that the consulting firm Raftelis lead public engagement, facilitate the Council goal-setting, and develop the City's Strategic Plan.

At the March 6, 2025, Study Session, the City Council was presented with a proposal from the City Manager to engage in a Strategic Plan. The Council expressed unanimous support for initiating this process. During the Council discussion, they articulated the following goals for the Strategic Plan:

- Define and document shared goals and priorities for the City over the next five years.
- Establish measurable milestones to track progress toward those goals.
- Align with the City's vision, mission, and values while outlining specific policy objectives.
- Identify key issues and set realistic, actionable steps to address them.
- Support informed decision-making and prioritize resource allocation.
- Ensure meaningful public engagement throughout the process.
- Strengthen community trust via the strategic planning process.

On March 21, 2025, the City issued a Request for Qualifications (RFQ) for Strategic Planning and Facilitation services. On April 21, 2025, the City received six responses from qualified firms. A committee of senior staff reviewed these responses and evaluated them based on the criteria established in the RFQ. The criteria included capacity to perform, demonstrated experience with City Councils and municipal government, experience with communities facing financial challenges, and approach to community engagement.

Additionally, the City Manager sought input from the City Council on what the Council felt was most important for staff to consider when evaluating the responses. Council feedback included:

- Preference for firms that have experience developing plans that are executed (rather than "sitting on the shelf").
- Mixed feedback regarding the importance of Washington state experience: Some Councilmembers felt experience in western Washington was critical, while others believed a fresh perspective would be valuable.
- A strong track record in utilizing various community engagement and communication methods, including digital and bilingual approaches, to maximize public engagement in the process.
- Preference for a firm that can guide the Council and staff through the strategic thinking process, with a desire for strategic thinking to be embedded in how the City and Council operate and make decisions.

Based on this input, along with Staff evaluation using the criteria mentioned above, three firms were interviewed. Following the interviews and contacting client references, Staff recommends that the firm Raftelis provide the strategic planning and facilitation services.

Discussion

Raftelis is a multi-disciplinary firm that focuses on municipalities and utilities, having worked with over 1,200 local governments and utilities. The firm has conducted strategic planning and management consulting work with nineteen cities in Washington. For example, Raftelis developed the Strategic Plan for Mercer Island, a local government facing similar budgetary and financial sustainability challenges due to limited growth and primarily residential land use.

The specific team assigned to the City of Des Moines for this project consists of the individuals who prepared the RFQ response and participated in the interviews. Reference checks were conducted, and the staff received universally positive reviews for their work. The project lead from Raftelis has nearly thirty years of experience as a local government management consultant and practitioner, focusing on West Coast communities.

The Council's initial discussion regarding the strategic planning process also emphasized the City's financial health and sustainability. In April, the City Council approved a contract with FCS Group for a Long-Range Financial Plan and Development Impact Analysis. That work has commenced, and we anticipate the findings from that effort will be completed by the end of 2025. We will ensure that this information is finalized and presented in time for the Council to consider when developing the strategic priorities and initiatives for this effort.

Discussion:

The scope of work for the project includes five major activities. These include:

- **Understand the Context:** Comprehensive review of relevant background materials, confidential individual interviews with the Mayor and City Council, interviews with City Manager and key senior staff.
- **Engage the Community and Staff:** Over several months, conduct various outreach activities including focus groups, town hall/open house community-wide meeting, and an online survey. City staff will also increase their efforts to promote awareness of the Strategic Plan and inform residents and businesses about the plan and encourage them to provide their input. Additionally, a survey will be administered of City staff to gauge input on the strategic needs and priorities within the organization.
- **Facilitate Strategic Planning Workshops:** After collecting robust input from the community, staff and Council, the Consultant will conduct two strategic planning workshops: the first with the City staff executive team to develop draft goals for the Strategic Plan. Then, there will be a City Council strategic planning workshop in which priorities can be refined and strategic initiatives determined. The timing of the City Council workshop will take into account the transition of a new Council to ensure both current Council voices are heard as well as provide the opportunity for the new Council to collectively develop the City's plan.
- **Develop Strategic Framework:** Draft strategic plan framework and review draft with City Council.
- **Provide Deliverables and Implementation Plan:** In order to ensure the implementation of the Strategic Plan, Consultant will develop an implementation template for each goal area identified by the City Council. These templates will help staff track progress and ensure accountability; additionally, pertinent updates can be shared with the public to keep them abreast of the City's progress. Consultant will conduct a workshop with key City staff to kickstart the process for implementation and tracking performance. Finally, Consultant will develop a high-quality, public-facing planning document for the City Council to adopt. Document may be similar in depth and material covered to this: [Gresham Strategic Plan](#)

Timeline and Cost:

The entire Strategic Plan process is expected to take six to seven months and will involve both the current City Council and the new City Council after the November 2025 election. The aim is to complete the Strategic Plan in time to influence the development of the 2027-2028 biennial budget.

The total cost for the process is \$74,900, which includes all travel expenses. Staff will coordinate with the consultant to maximize travel to Des Moines, ensuring multiple activities are conducted during each trip, and

will use virtual meetings when feasible. The main cost factors are the extent of community engagement and the effort required for implementation planning; however, Council feedback indicates that both are valued and high priorities.

Based on the process and final product desired, this cost is in range and typical for similar Plans at other cities.

During the 2025/2026 budget development, \$100,000 was set aside for contract services and economic development. These funds will be used for this effort. Regarding economic development, upon further consideration, Staff recommends the City Council set its broad Strategic Plan and key priorities, which will then inform an economic development strategy. Additionally, staff are pursuing a grant that would cover contract costs for certain economic development activities.

Alternatives:

The City Council direct staff to reject this proposed scope of work and fee and issue a new Request for Qualifications to solicit firms interested in this work.

Recommendation:

Staff recommends the City Council approve this contract and proposed scope of work.



CONSULTANT SERVICES CONTRACT between the City of Des Moines and

RAFTELIS FINANCIAL CONSULTANTS, INC

THIS CONTRACT is made between the City of Des Moines, a Washington municipal corporation (hereinafter the "City"), and Raftelis Financial Consultants, Inc. organized under the laws of the State of North Carolina, located and doing business at 611 Wilshire Boulevard, Suite 900, PMB1009, Los Angeles, CA 90018 (hereinafter the "Consultant").

I. DESCRIPTION OF WORK.

Consultant shall perform the following services for the City in accordance with the following described plans and/or specifications:

As described in Exhibit "A" attached to this agreement and herein incorporated by reference

Consultant further represents that the services furnished under this Contract will be performed in accordance with generally accepted professional practices within the Puget Sound region in effect at the time those services are performed.

II. TIME OF COMPLETION. The parties agree that work will begin on the tasks described in Section I above immediately upon the effective date of this Contract. Upon the effective date of this Contract, Consultant shall complete the work described in Section I by December 31, 2026.

III. COMPENSATION.

- A. The City shall pay the Consultant, based on time and materials, an amount not to exceed \$74,900.00 for the services described in this Contract. This is the maximum amount to be paid under this Contract for the work described in Section I above, and shall not be exceeded without the prior written authorization of the City in the form of a negotiated and executed amendment to this Contract. The Consultant agrees that the amount budgeted for as set forth in Exhibit Exhibit "A" for its services contracted for herein shall remain locked at the negotiated rate(s) for a period of one (1) year from the effective date of this Contract.

- B. The Consultant shall submit monthly payment invoices to the City for work performed, and a final bill upon completion of all services described in this Contract. The City shall provide payment within forty-five (45) days of receipt of an invoice. If the City objects to all or any portion of an invoice, it shall notify the Consultant and reserves the option to only pay that portion of the invoice not in dispute. In that event, the parties will immediately make every effort to settle the disputed portion.

IV. INDEPENDENT CONTRACTOR. The parties intend that an Independent Contractor-Employer Relationship will be created by this Contract and that the Consultant has the ability to control and direct the performance and details of its work; however, the City shall have authority to ensure that the terms of the Contract are performed in the appropriate manner.

V. CHANGES. The City may issue a written change order for any change in the Contract work during the performance of this Contract. If the Consultant determines, for any reason, that a change order is necessary, Consultant must submit a written change order request to the person listed in the notice provision section of this Contract, section XVI(C), within fourteen (14) calendar days of the date Consultant knew or should have known of the facts and events giving rise to the requested change. If the City determines that the change increases or decreases the Consultant's costs or time for performance, the City will make an equitable adjustment. The City will attempt, in good faith, to reach agreement with the Consultant on all equitable adjustments. However, if the parties are unable to agree, the City will determine the equitable adjustment as it deems appropriate. The Consultant shall proceed with the change order work upon receiving either a written change order from the City or an oral order from the City before actually receiving the written change order. If the Consultant fails to require a change order within the time specified in this paragraph, the Consultant waives its right to make any claim or submit subsequent change order requests for that portion of the contract work. If the Consultant disagrees with the equitable adjustment, the Consultant must complete the change order work; however, the Consultant may elect to protest the adjustment as provided in subsections A through E of Section VI, Claims, below.

The Consultant accepts all requirements of a change order by: (1) endorsing it, (2) writing a separate acceptance, or (3) not protesting in the way this section provides. A change order that is accepted by Consultant as provided in this section shall constitute full payment and final settlement of all claims for contract time and for direct, indirect and consequential costs, including costs of delays related to any work, either covered or affected by the change.

VI. CLAIMS. If the Consultant disagrees with anything required by a change order, another written order, or an oral order from the City, including any direction, instruction, interpretation, or determination by the City, the Consultant may file a claim as provided in this section. The Consultant shall give written notice to the City of all claims within fourteen (14) calendar days of the occurrence of the events giving rise to the claims, or within fourteen (14) calendar days of the date the Consultant knew or should have known of the facts or events giving rise to the claim, whichever occurs first. Any claim for damages, additional payment for any reason, or extension of time, whether under this Contract or otherwise, shall be conclusively deemed to have been waived by the Consultant unless a

timely written claim is made in strict accordance with the applicable provisions of this Contract.

At a minimum, a Consultant's written claim shall include the information set forth in subsections A, items 1 through 5 below.

FAILURE TO PROVIDE A COMPLETE, WRITTEN NOTIFICATION OF CLAIM WITHIN THE TIME ALLOWED SHALL BE AN ABSOLUTE WAIVER OF ANY CLAIMS ARISING IN ANY WAY FROM THE FACTS OR EVENTS SURROUNDING THAT CLAIM OR CAUSED BY THAT DELAY.

- A. Notice of Claim. Provide a signed written notice of claim that provides the following information:
 - 1. The date of the Consultant's claim;
 - 2. The nature and circumstances that caused the claim;
 - 3. The provisions in this Contract that support the claim;
 - 4. The estimated dollar cost, if any, of the claimed work and how that estimate was determined; and
 - 5. An analysis of the progress schedule showing the schedule change or disruption if the Consultant is asserting a schedule change or disruption.

- B. Records. The Consultant shall keep complete records of extra costs and time incurred as a result of the asserted events giving rise to the claim. The City shall have access to any of the Consultant's records needed for evaluating the protest.

The City will evaluate all claims, provided the procedures in this section are followed. If the City determines that a claim is valid, the City will adjust payment for work or time by an equitable adjustment. No adjustment will be made for an invalid protest.

- C. Consultant's Duty to Complete Protested Work. In spite of any claim, the Contractor shall proceed promptly to provide the goods, materials and services required by the City under this Contract.

- D. Failure to Protest Constitutes Waiver. By not protesting as this section provides, the Consultant also waives any additional entitlement and accepts from the City any written or oral order (including directions, instructions, interpretations, and determination).

- E. Failure to Follow Procedures Constitutes Waiver. By failing to follow the procedures of this section, the Consultant completely waives any claims for protested work and accepts from the City any written or oral order (including directions, instructions, interpretations, and determination).

VII. LIMITATION OF ACTIONS. CONSULTANT MUST, IN ANY EVENT, FILE ANY LAWSUIT ARISING FROM OR CONNECTED WITH THIS CONTRACT WITHIN 120 CALENDAR DAYS FROM THE DATE THE CONTRACT WORK IS COMPLETE OR CONSULTANT'S ABILITY

TO FILE THAT CLAIM OR SUIT SHALL BE FOREVER BARRED. THIS SECTION FURTHER LIMITS ANY APPLICABLE STATUTORY LIMITATIONS PERIOD.

VIII. TERMINATION. Either party may terminate this Contract, with or without cause, upon providing the other party thirty (30) days written notice at its address set forth on the signature block of this Contract. After termination, the City may take possession of all records and data within the Consultant's possession pertaining to this project, which may be used by the City without restriction. If the City's use of Consultant's records or data is not related to this project, it shall be without liability or legal exposure to the Consultant.

IX. DISCRIMINATION. In the hiring of employees for the performance of work under this Contract or any subcontract, the Consultant, its subcontractors, or any person acting on behalf of the Consultant or subcontractor shall not, by reason of race, religion, color, sex, age, sexual orientation, national origin, or the presence of any sensory, mental, or physical disability, discriminate against any person who is qualified and available to perform the work to which the employment relates.

X. INDEMNIFICATION. Consultant shall defend, indemnify and hold the City, its officers, officials, employees and volunteers harmless from any and all claims, injuries, damages, losses or suits including attorney fees, arising out of or resulting from the acts, errors or omissions of the Consultant in performance of this Contract, except for injuries and damages caused by the sole negligence of the City.

The City's inspection or acceptance of any of Consultant's work when completed shall not be grounds to avoid any of these covenants of indemnification.

Should a court of competent jurisdiction determine that this Contract is subject to RCW 4.24.115, then, in the event of liability for damages arising out of bodily injury to persons or damages to property caused by or resulting from the concurrent negligence of the Consultant and the City, its officers, officials, employees, and volunteers, the Consultant's liability, including the duty and cost to defend, hereunder shall be only to the extent of the Consultant's negligence.

IT IS FURTHER SPECIFICALLY AND EXPRESSLY UNDERSTOOD THAT THE INDEMNIFICATION PROVIDED HEREIN CONSTITUTES THE CONSULTANT'S WAIVER OF IMMUNITY UNDER INDUSTRIAL INSURANCE, TITLE 51 RCW, SOLELY FOR THE PURPOSES OF THIS INDEMNIFICATION. THIS WAIVER HAS BEEN MUTUALLY NEGOTIATED BY THE PARTIES.

The provisions of this section shall survive the expiration or termination of this Contract.

XI. INSURANCE. The Consultant shall procure and maintain for the duration of the Contract, insurance against claims for injuries to persons or damage to property which may arise from or in connection with the performance of the work hereunder by the Consultant, its agents, representatives, or employees.

No Limitation. Consultant's maintenance of insurance as required by the Contract shall not be construed to limit the liability of the Consultant to the coverage

provided by such insurance, or otherwise limit the City's recourse to any remedy available at law or in equity.

A. Minimum Scope of Insurance. Consultant shall obtain insurance of the types and coverage described below:

1. Automobile Liability insurance covering all owned, non-owned, hired and leased vehicles. Coverage shall be at least as broad as Insurance Services Office (ISO) form CA 00 01.
2. Commercial General Liability insurance shall be at least as broad as ISO occurrence form CG 00 01 and shall cover liability arising from premises, operations, stop-gap independent contractors and personal injury and advertising injury. The City shall be named as an additional insured under the Consultant's Commercial General Liability insurance policy with respect to the work performed for the City using an additional insured endorsement at least as broad as ISO endorsement form CG 20 26.
3. Workers' Compensation coverage as required by the Industrial Insurance laws of the State of Washington.
4. Professional Liability insurance appropriate to the Consultant's profession.

B. Minimum Amounts of Insurance: Consultant shall maintain the following insurance limits:

1. Automobile Liability insurance with a minimum combined single limit for bodily injury and property damage of \$1,000,000 per accident.
2. Commercial General Liability insurance shall be written with limits no less than \$2,000,000 each occurrence, \$2,000,000 general aggregate.
3. Professional Liability insurance shall be written with limits no less than \$2,000,000 per claim and \$2,000,000 policy aggregate limit.

C. Other Insurance Provisions.

1. The Consultant's Automobile Liability and Commercial General Liability insurance policies are to contain, or be endorsed to contain that they shall be primary insurance as respect the City. Any insurance, self-insurance, or self-insured pool coverage maintained by the City shall be excess of the Consultant's insurance and shall not contribute with it.
2. The Consultant's insurance shall be endorsed to state that coverage shall not be cancelled by either party, except after thirty (30) days prior written notice by certified mail, return receipt requested, has been given to the City.

D. Acceptability of Insurers. Insurance is to be placed with insurers with a current A.M. Best rating of not less than A: VII.

E. Verification of Coverage Consultant shall furnish the City with original certificates and a copy of the amendatory endorsements, including but not

necessarily limited to the additional insured endorsement, evidencing the insurance requirements of the Contract before commencement of the work.

F. Notice of Cancellation. The Consultant shall provide the City with written notice of any policy cancellation within two business days of their receipt of such notice.

G. Failure to Maintain Insurance. Failure on the part of the Consultant to maintain the insurance as required shall constitute a material breach of contract, upon which the City may, after giving five business days notice to the Consultant to correct the breach, immediately terminate the Agreement or, at its discretion, procure or renew such insurance and pay any and all premiums in connection therewith, with any sums so expended to be repaid to the City on demand, or at the sole discretion of the City, offset against funds due the Consultant from the City.

H. City Full Availability of Consultant Limits. If the Consultant maintains higher insurance limits than the minimums shown above, the City shall be insured for the full available limits of Commercial General and Excess or Umbrella liability maintained by the Consultant, irrespective of whether such limits maintained by the Consultant are greater than those required by this Agreement or whether any certificate of insurance furnished to the City evidences limits of liability lower than those maintained by the Consultant.

XII. EXCHANGE OF INFORMATION. The City will provide its best efforts to provide reasonable accuracy of any information supplied by it to Consultant for the purpose of completion of the work under this Contract.

XIII. OWNERSHIP AND USE OF RECORDS AND DOCUMENTS. Original documents, drawings, designs, reports, or any other records developed or created under this Contract shall belong to and become the property of the City. All records submitted by the City to the Consultant will be safeguarded by the Consultant. Consultant shall make such data, documents, and files available to the City upon the City's request. The City's use or reuse of any of the documents, data and files created by Consultant for this project by anyone other than Consultant on any other project shall be without liability or legal exposure to Consultant.

XIV. CITY'S RIGHT OF INSPECTION. Even though Consultant is an independent contractor with the authority to control and direct the performance and details of the work authorized under this Contract, the work must meet the approval of the City and shall be subject to the City's general right of inspection to secure satisfactory completion.

XV. WORK PERFORMED AT CONSULTANT'S RISK. Consultant shall take all necessary precautions and shall be responsible for the safety of its employees, agents, and subcontractors in the performance of the contract work and shall utilize all protection necessary for that purpose. All work shall be done at Consultant's own risk, and Consultant

shall be responsible for any loss of or damage to materials, tools, or other articles used or held for use in connection with the work.

XVI. MISCELLANEOUS PROVISIONS.

A. Non-Waiver of Breach. The failure of the City to insist upon strict performance of any of the covenants and agreements contained in this Contract, or to exercise any option conferred by this Contract in one or more instances shall not be construed to be a waiver or relinquishment of those covenants, agreements or options, and the same shall be and remain in full force and effect.

B. Resolution of Disputes and Governing Law.

1. Alternative Dispute Resolution. If a dispute arises from or relates to this Contract or the breach thereof and if the dispute cannot be resolved through direct discussions, the parties agree to endeavor first to settle the dispute in an amicable manner by mediation administered by a mediator under JAMS Alternative Dispute Resolution service rules or policies before resorting to arbitration. The mediator may be selected by agreement of the parties or through JAMS. Following mediation, or upon written agreement of the parties to waive mediation, any unresolved controversy or claim arising from or relating to this Contract or breach thereof shall be settled through arbitration which shall be conducted under JAMS rules or policies. The arbitrator may be selected by agreement of the parties or through JAMS. All fees and expenses for mediation or arbitration shall be borne by the parties equally. However, each party shall bear the expense of its own counsel, experts, witnesses, and preparation and presentation of evidence.

2. Applicable Law and Jurisdiction. This Contract shall be governed by the laws of the State of Washington. Although the agreed to and designated primary dispute resolution method as set forth above, in the event any claim, dispute or action arising from or relating to this Contract cannot be submitted to arbitration, then it shall be commenced exclusively in the King County Superior Court or the United States District Court, Western District of Washington as appropriate. In any claim or lawsuit for damages arising from the parties' performance of this Contract, each party shall pay all its legal costs and attorney's fees incurred in defending or bringing such claim or lawsuit, in addition to any other recovery or award provided by law; provided, however, nothing in this paragraph shall be construed to limit the City's right to indemnification under Section X of this Contract.

C. Written Notice. All communications regarding this Contract shall be sent to the parties at the addresses listed on the signature page of this Contract, unless notified to the contrary. Any written notice hereunder shall become effective three (3) business days after the date of mailing by registered or certified mail, and shall be deemed sufficiently given if sent to the addressee at the address stated in this Contract or such other address as may be hereafter specified in writing.

D. Assignment. Any assignment of this Contract by either party without the written consent of the non-assigning party shall be void. If the non-assigning party gives its consent to any assignment, the terms of this Contract shall continue in full force and effect and no further assignment shall be made without additional written consent.

E. Modification. No waiver, alteration, or modification of any of the provisions of this Contract shall be binding unless in writing and signed by a duly authorized representative of the City and Consultant.

F. Entire Contract. The written provisions and terms of this Contract, together with any Exhibits attached hereto, shall supersede all prior verbal statements of any officer or other representative of the City, and such statements shall not be effective or be construed as entering into or forming a part of or altering in any manner this Contract. All of the above documents are hereby made a part of this Contract. However, should any language in any of the Exhibits to this Contract conflict with any language contained in this Contract, the terms of this Contract shall prevail.

G. Compliance with Laws. The Consultant agrees to comply with all federal, state, and municipal laws, rules, and regulations that are now effective or in the future become applicable to Consultant's business, equipment, and personnel engaged in operations covered by this Contract or accruing out of the performance of those operations.

H. Business License. Contractor shall comply with the provisions of Title 5 Chapter 5.04 of the Des Moines Municipal Code.

I. Counterparts. This Contract may be executed in any number of counterparts, each of which shall constitute an original, and all of which will together constitute this one Contract.

J. Records Retention and Audit. During the progress of the Work and for a period not less than three (3) years from the date of completion of the Work or for the retention period required by law, whichever is greater, records and accounts pertaining to the Work and accounting therefore are to be kept available by the Parties for inspection and audit by representatives of the Parties and copies of all records, accounts, documents, or other data pertaining to the Work shall be furnished upon request. Records and accounts shall be maintained in accordance with applicable state law and regulations.



June 27, 2025

Katherine Caffrey, City Manager
City of Des Moines
21630 11th Avenue S, Suite A
Des Moines WA 98198

Subject: Scope of Work and Cost Proposal for a Citywide Strategic Plan

Dear Ms. Caffrey:

Thank you for considering Raftelis for this engagement. Per your request, I have provided a scope of work and price proposal based upon our discussions.

Please contact me with any questions. We look forward to assisting the City with this important work.

Sincerely,

A handwritten signature in black ink that reads 'Nancy Hetrick'.

Nancy Hetrick, *Vice President*

P: 408.674.3369 / E: nhetrick@raftelis.com

Scope of Work

THE FOLLOWING OUTLINES OUR PROPOSED SCOPE OF WORK FOR DEVELOPING A STRATEGIC PLAN WITH THE CITY.

Activity 1: Understand the Context

A successful process will benefit from a collaborative relationship between the consultant and City project teams from the very beginning of the process. This task is intended to begin building that relationship.

At the start of the engagement, our team will conduct a virtual kick-off meeting with the City Manager and other key staff on the City’s project team to discuss the project, schedule, and communication and engagement strategies.

We will provide the City with a document/data request for background information such as prior survey results, existing planning documents, demographic information, and more. We will carefully review the information to learn about the City’s operating context and key projects and initiatives over the next several years.

Next, Raftelis will confidentially and individually interview the Mayor and City Councilmembers remotely to learn about their expectations for the strategic plan, as well as insights into the City’s strengths, weaknesses, opportunities, challenges, and planned initiatives for the future. In addition, Raftelis will interview new council members – those who are elected to the body in November – to ensure all voices are included in the engagement themes.

Our team will incorporate the information from our document review and interviews into the development of an Environmental Scan. The Environmental Scan will provide helpful background information about the City’s current state and potential future impacts. To finalize the Environmental Scan, we will gather existing data about the community, such as financial trends, demographic data, statistics about housing, business, and jobs, and other relevant information. This information will provide important context and a foundation upon which the strategic plan can be developed. We will review the Scan with the City’s project team, perform any necessary follow-up work, and finalize it.

Throughout the project, our team will provide regular status updates to the City and both formal and informal opportunities to discuss the process and make any necessary adjustments.

Activity 1 Meetings	Activity 1 Deliverables
<ul style="list-style-type: none"> • Project kick-off meeting • Interviews with Mayor and City Council members 	<ul style="list-style-type: none"> • Kick-off meeting agenda • Draft and final project schedule • Document/data request • Draft and final Environmental Scan

Activity 2: Engage the Community and Staff

A strategic plan is best when touched by as many people as possible. In this activity, we will solicit input from community and staff stakeholders. We will first review and finalize the engagement plan with the City’s project team and discuss and affirm key activities and methods early in the process.

We will plan for and lead a series of engagement activities to obtain input from community stakeholders. This includes focus groups, a Town Hall/Open House, and an online survey. We will also provide support and guidance to city staff to conduct addition outreach through community events and at city facilities.

In consultation with the City’s project team, we will plan for and facilitate up to six focus groups. We will work with the City to identify key stakeholders, such as community associations, business groups, and representatives on boards and commissions to participate in these sessions. One of the outcomes of the process that we are recommending is the spirit of community that is developed among participants. With a sound process and facilitation, participants will develop ownership of, and a commitment to, the strategic planning process and its implementation. In addition to the focus groups, we will work with the City to plan for an engaging Town Hall/Open House that invites community members to share their perspectives, priorities and vision for the future of Des Moines.

In collaboration with the City, our team will also develop an online survey for community stakeholders. We will draft the survey for staff review, administer the survey online, and analyze and summarize all input received. The survey can be posted on the City’s website or distributed directly using a QR code. We use the online survey platform Zoho™ which maintains confidentiality; all survey responses come directly to Raftelis from the respondent.

To engage City staff in the process, we will develop and administer an online employee survey for all City staff. Through a series of targeted questions, we will learn about staff perceptions of mission and values for the City and ask about City strengths, weaknesses, opportunities, and challenges (SWOC). We will identify themes and summarize responses for the City.

Following these activities, Raftelis will prepare a “Sense of Stakeholders” document that summarizes all input and identifies key themes. We will review the draft with the City’s project team and finalize it based upon their input. This summary of engagement activities will be especially helpful to aid new council members who join the elected body following the election in November.

Activity 2 Meetings	Activity 2 Deliverables
<ul style="list-style-type: none"> • Six community focus group meetings • Town Hall/Open House 	<ul style="list-style-type: none"> • Draft and final online staff survey • Draft and final online community stakeholder survey • Sense of Stakeholders document

Activity 3: Facilitate Strategic Planning Workshops

Following the engagement activities, our team will prepare for and facilitate a workshop with the City’s executive team. During this session, we will review the Sense of Stakeholders document, reflect on the City’s existing mission, vision and values, and begin to draft goals and strategies for the City.

Next, we will plan and facilitate a strategic planning workshop with the City Council to finalize the City’s strategic planning framework and answer the fundamental questions, “What is our vision of the future” and “How do we get there?” This workshop will again review the Sense of Stakeholders to consider the input from the broader community, reflect on the City’s Vision, review draft goals and strategies, and provide the opportunity to identify strategic initiatives that will guide implementation so the Vision can be realized. The timing of the City Council workshop will take into account the transition of a new council to ensure new voices are active in the development of the city’s plan.

This workshop will include activities that will allow everyone to actively participate and engage in the process. Our visual facilitator will transform your conversations into live graphic form, before participants leave the room, promoting a sense of shared understanding.

During the session, the primary role of the facilitator is to ensure that the environment is respectful and conducive to open and constructive dialogue so that the established objectives are ultimately met. While the agenda provides the structure to accomplish the tasks, we also know how important it is to pay attention to the group and make sure that conversations that need to happen actually happen, so we are flexible and in tune with the group during the process.

Activity 3 Meetings	Activity 3 Deliverables
<ul style="list-style-type: none"> • Executive team workshop • Strategic planning workshop with City Council 	<ul style="list-style-type: none"> • Workshop materials and PowerPoint slide decks

Activity 4: Develop Strategic Framework

Based upon workshop outcomes, Raftelis will prepare a draft strategic plan framework, including vision, mission, values, and strategic goals. We will meet with the City’s project team to review the draft framework and incorporate their feedback.

Our team will conduct a study session with the City Council to review the strategic framework and finalize it.

Activity 4 Meetings	Activity 4 Deliverables
<ul style="list-style-type: none"> • Meeting with City’s team to review draft framework • Study session with City Council to review framework 	<ul style="list-style-type: none"> • Draft and final strategic plan framework

Activity 5: Provide Deliverables and Implementation Plan

In order to ensure the implementation of the strategic plan, our team will prepare a custom implementation template for each Goal area identified during the City Council workshop. These templates will help to create consistency across the organization and to enhance accountability to ensure that progress is made on the City’s strategic objectives.

Our team will plan for and facilitate a workshop with key staff from each City department to review the goals, identify key strategies to achieve them, and align existing City programs and initiatives with strategic outcomes. We will work with staff to fill out the implementation templates for each Goal in order to identify who is accountable, the estimated timeline, the resources required, and to identify several “key performance indicators” (KPIs) to be used to measure achievement toward each goal. This workshop will result in an initial implementation plan to be used as a living document for tracking progress toward the achievement of strategic plan goals.

In our final activity, Raftelis will prepare a high-quality, public-facing strategic planning document for review by the City. Based upon feedback received, our team will finalize the strategic plan document and present it to the City Council for adoption.

Activity 5 Meetings	Activity 5 Deliverables
<ul style="list-style-type: none"> • Staff workshop to prepare implementation plan • City Council presentation 	<ul style="list-style-type: none"> • Draft implementation plan • Draft and final strategic plan

Cost/Fees

The total fixed fee to complete the scope of work outlined in this proposal is \$74,900, which includes all professional fees and expenses, including travel.

A breakdown of costs by project activity is provided in the table below.

Activity	Description	Cost
1	Understand the Context	\$9,500
2	Engage the Community and Staff	\$21,400
3	Facilitate Strategic Planning Workshops	\$21,250
4	Develop Strategic Framework	\$5,500
5	Provide Deliverables and Implementation Plan	\$17,250
TOTAL		\$74,900

It is our practice to invoice clients for monthly progress payments based upon work completed.

Community Engagement and Outreach Plan Associated with City Strategic Plan and Facilitation Services

- Raftelis will take the lead on the overall strategy for community engagement and the primary activities including developing and leading the six focus groups, leading the Town Hall/Open House community-wide meeting, and developing the online community survey and employee survey.
- City staff's role will include:
 - Collaborating with City Council to establish the focus group participation structure and select participants.
 - Develop dedicated webpage on City's website with information on Strategic Plan
 - Advertise the Town Hall and Community Survey through a variety of methods including but not limited to:
 - Signage in multiple languages throughout the City
 - Targeted outreach via existing events such as downtown Trick or Treating, What's Up Des Moines, youth sports at Fieldhouse, etc.
 - Targeted outreach to existing groups including City boards and commissions including the CAB, neighborhood groups, Wesley, Judson Park, etc.
 - Paid social media and regular social media posts
 - Utilize existing City communication channels including City mailing list and City Manager Report
 - Flyers and posters at City facilities
 - Email signature with link to survey and advertising town hall during campaign
 - Share information and news with Waterland Blog
 - Specifically how we will reach out to underserved areas and populations:
 - Strategic Plan "Pop Up" for the survey and process at apartment complex meeting rooms
 - Survey in multiple languages (English, Spanish, Dari)
 - Leverage community relationships with Community Services Officer
 - Consider direct mail postcards to underserved areas
 - Reach out to community non-profits for in-roads to certain groups (i.e. Food Bank, Lighthouse, etc)
 - Partner with KCLS to include survey and visual input opportunities at both Library branches
 - Reach out to schools in nearby areas—both public, private and charter