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APRIL 29, 2020

RFP #005-20



SUBMITTED BY:

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# STRATEGIC PLANNING SERVICES

CITY OF KEY WEST, FLORIDA



April 24, 2020

Ms. Patti McLaughlin, Assistant City Manager  
 City of Key West, Office of the City Clerk  
 1300 White Street  
 Key West, Florida 33040

Dear Ms. McLaughlin:

MGT of America Consulting, LLC (MGT) is pleased to submit our proposal to the City of Key West (City) in response to RFP #005-20 to provide Strategic Planning Services.

MGT has a long history providing strategic planning and other consulting services to public sector clients. As a result of this experience, we understand the environment in which the strategic planning process will be conducted and its importance to the City. In addition, MGT is partnering with *Quest Corporation of America* (Quest). Founded in 1995, Quest is a woman-owned communications firm with over 25 years of experience providing public involvement, outreach services, and marketing and communications products to complex and controversial projects of every size. From concept to construction and well beyond, their expertise enables them to deliver high-quality solutions for clients that pave the way for long-lasting benefits to the community.

To meet the requirements outlined in your RFP, we have devised an approach that places a high premium on a series of assessment activities designed to provide information and insights necessary to inform and guide critical discussions about mission, vision, goals, objectives, and strategies. In meeting your needs for a strategic planning process that results in much different outcomes than previous efforts, we feel it is extremely important to devote the time necessary engaging the City Manager, Commission, and key stakeholders to help inform the development of strategic goals, objectives, and strategies.

Provided below are a sample of Florida clients for whom MGT has completed strategic plans.

FLORIDA CLIENTS	
▶ Bethune-Cookman College	▶ Indian River State College
▶ Edward Waters College	▶ Miami-Dade County
▶ Florida Department of Children and Families	▶ Nassau County
▶ Florida Department of Education	▶ Palm Beach State College
▶ Florida Department of General Services	▶ Seminole County
▶ Florida Department of Juvenile Justice	▶ Tallahassee Girls Choir of CHOICE
▶ Florida Department of Management Services	▶ Tallahassee Housing Authority
▶ Florida Virtual School	▶ University of North Florida

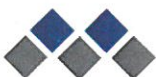
MGT's proposal shall remain in effect for a period of 120 days following the closing date (4/29/2020) of the RFP.

Thank you for the opportunity to submit our proposal. We look forward to working with the City in developing its strategic plan. Should you have any questions, please contact me at **850.212.6458** or **fseamon@mgtconsulting.com**.

Sincerely,



Fred Seamon, Ph.D.  
 Executive Vice President  
 Authorized to Legally Bind the Firm





## CITY OF KEY WEST, FLORIDA

RFP #005-20 | STRATEGIC PLANNING SERVICES

APRIL 29, 2020

### TABLE OF CONTENTS

I. SCOPE OF WORK (PROPOSAL) .....	1
PROJECT APPROACH .....	1
EXPERTISE .....	7
PROJECT MANAGEMENT .....	10
2. REQUIRED FORMS AND AFFIDAVITS .....	21
3. PRICING .....	33
4. ADDENDUM ACKNOWLEDGMENT .....	34

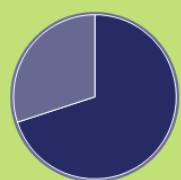
### PROPOSAL EXHIBITS

Exhibit 1. Strategic Plan Process .....	2
Exhibit 2. Project Phases .....	3
Exhibit 3. Sample of Relevant Experience .....	8
Exhibit 4. Roles and Responsibilities .....	14
Exhibit 5. Project Schedule .....	20
Exhibit 6. Cost of Services .....	33



# WHAT IS STRATEGIC PLANNING?

Strategic planning is the path we take from why we exist (mission) to what we want to become (vision).



UP TO **70 percent** of strategic plans are not effectively executed.

## THEMES

Themes are a nice way for organizations to organize their goals under broader labels.



Anything **"big picture"** is likely a theme.

## GOALS

Goals are a translation of the vision as it applies to each theme.



Goals answer the question: **WHAT DO WE WANT?**

## OBJECTIVES

Objectives are quantifiable metrics that show the progress toward stated goals.

Use the words... **increase** **decrease**

...to ensure your objective is quantifiable.

## STRATEGIES



Strategies are the action plans that, when implemented, will achieve the objectives.

## IMPLEMENTATION PLAN



The day-to-day and week-to-week actions taken to implement strategies, meet objectives, and accomplish goals.





# I. SCOPE OF WORK (PROPOSAL)

## PROJECT APPROACH

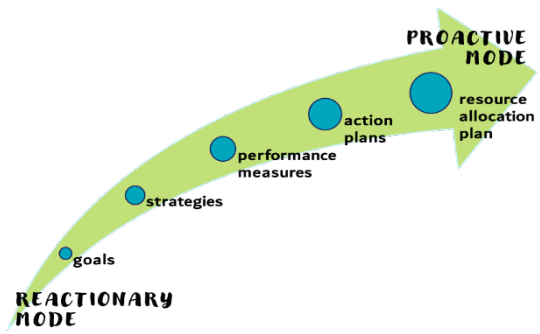
MGT’s team, which include Quest Corporation of America (Quest), will work in collaboration with the Mayor, City Commission, City Manager’s Office, City departments, and stakeholders to facilitate development of the City’s strategic plan. We believe the close collaboration and partnership between MGT and those who have an interest, investment, and commitment to the future of Key West is essential to the development of an effective and successful strategic plan. Most important, the strategic plan and its implementation must result in significantly different outcomes than previous strategic planning efforts. **We strongly believe ample collaboration and having the fingerprints of key stakeholders at appropriate touch points during strategic planning is essential to success.**

Typically, a key first step in our approach is a project initiation phase to clarify and confirm expected outcomes and key milestones. The results of project initiation will help ensure the *nuts and bolts* of the strategic plan development process meet your specific needs and expectations. MGT’s goal is to guarantee all parties have a full and complete understanding of the how MGT will meet scope of work requirements and achieve expected outcomes. We also use project initiation to begin to understand and appreciate the environment and context in which the strategic planning process will be conducted.

Following project initiation, we will conduct a series of situational assessment activities (Phase I) that focus on data gathering and data synthesis. The major outcome of the situational assessment will be a body of information and data that will be used to inform community visioning, environmental scan/SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis, and facilitated work sessions to address mission, vision, core values, goals, and objectives. The situational assessment also will factor the impact of the COVID-19 crisis and its implications for the strategic planning.

Properly designed and implemented, strategic planning is a proactive process of envisioning the future and developing the necessary strategic actions to bring that vision to fruition. Most importantly, it is a process of defining an organization’s future direction and strategy and making decisions about allocating its resources, including capital and people to achieve winning outcomes.

A successful strategic plan serves as a roadmap for keeping an organization on course. In addition, **strategic planning moves the entity from reactionary modes to proactive modes** by connecting goals, strategies, performance measures, and action plans to an overall resource allocation process. Entities that link these elements through the strategic planning process are much more likely to achieve goals and enhance their overall organizational effectiveness.



In today’s rapidly changing environment and landscape, multiple PEST (political, economic, social, technology) factors impact all organizations. An effective strategic planning process will allow the City to chart a course for the future that meets current and future needs of Key West and its residents.

The typical MGT strategic planning model includes the following major activities:

- ◆ Customize the strategic planning process.
- ◆ Examine internal processes.



- ◆ Engage key stakeholders (internal and external).
- ◆ Clarify the organization’s mission, vision, and values.
- ◆ Frame critical strategic issues.
- ◆ Identify specific strategic initiatives.
- ◆ Assess current resources and future resource requirements.
- ◆ Assess current and future programs and services.
- ◆ Formulate strategic goals.
- ◆ Link goals to the City’s mission.
- ◆ Build monitoring and evaluation plan for implementation.

Ultimately, MGT’s strategic planning process will result in the following outcomes:

- ◆ A “roadmap” that enables the City to move proactively into the future.
- ◆ Consensus on mission and a vision for the future.
- ◆ Realistic, achievable, and practical strategic goals and objectives.
- ◆ A “living” document that undergoes periodic review and adjustment to reflect progress toward achievement of goals and objectives.

Illustrated in **Exhibit 1** is the process MGT proposes for consideration by the City in developing a strategic plan based upon a comprehensive strategic assessment process. The process is premised on assessing the City environment in order to develop strategic goals and objectives.

*Exhibit 1. Strategic Plan Process*



This project will be conducted in four phases as illustrated in **Exhibit 2**. To conduct each phase and meet all requirements and deliverables specified in the Scope of Work, MGT has developed a set of key tasks/activities. Based on the initial project initiation meetings, MGT will revise and finalize the work plan and schedule, which will become the tool used to navigate and monitor completion of each phase. Please note that it may be possible to perform some tasks and activities simultaneously while others must be performed sequentially due to the nature of the activities involved.



Exhibit 2. Project Phases



At this stage our proposed work plan is a high-level work plan. Based on the initial project initiation meetings, MGT will prepare a more detailed work plan that aligns with discussions about expectations, deliverables, roles and responsibilities, and the participation of the City Commission, employees, and key stakeholders who will be involved in the strategic planning process. MGT will revise and finalize the work plan and schedule, which will become the tool used by MGT and the City to navigate and monitor completion of each phase.

**PHASE I: SITUATION ANALYSIS**

**TASK 1.0: CONDUCT PROJECT INITIATION**

**ACTIVITIES**

- 1.1 Schedule and conduct initial project kickoff meeting(s) with the City.
- 1.2 Review project objectives, expectations, communication protocols, and reporting requirements.
- 1.3 Discuss timing and execution of project activities relative to City commitments, events, initiatives, and the roles and responsibilities of the City and MGT.
- 1.4 Collect and review data, reports, plans, and other source documents pertinent to the strategic planning process. MGT will submit a documents requests for source documents that are not available on the City’s website or other sources.
- 1.5 In collaboration with the City, discuss MGT’s plan and approach to gathering community and stakeholder input.
- 1.6 Discuss and finalize schedule for the different components of the strategic planning process.
- 1.7 Revise work plan and corresponding timelines (if necessary) and submit final work plan.

**DELIVERABLES**

- ◆ Final work plan and project schedule.
- ◆ Onsite project initiation meeting(s).

**TASK 2.0: CONDUCT ENVIRONMENTAL SCAN/SWOT ANALYSIS**

**ACTIVITIES**

- 2.1 Review MGT’s environmental scan/SWOT analysis protocol and revise if needed.
- 2.2 Review and assess relevant data, information, strategic initiatives that may impact the City over the next three to five years.
- 2.3 Schedule and conduct interviews with the Mayor, City Manager, City Commission, and department heads.



- 2.4 Schedule and conduct at least four City staff focus groups.
- 2.5 Design and launch employee online survey.
- 2.6 Collect and analyze data on trends and issues that may impact the City over the next three to five years.
- 2.7 Prepare a summary that encompass the results of Activities 2.1-2.5 and the community visioning results in Task 3.0.
- 2.8 Submit summary for review and comment.
- 2.9 Finalize summary including identifying key issues to consider in developing the City’s strategic plan.

**DELIVERABLE**

- ◆ Environmental Scan/SWOT Summary.

**TASK 3.0: COMMUNITY VISIONING**

**ACTIVITIES**

- 3.1 Plan and organize stakeholder community visioning process.
- 3.2 Establish community-based/stakeholder-based Community Planning Teams (CPTs) to assist in gathering input on priority issues and vision for the future.
- 3.3 Plan and conduct community visioning input sessions using multiple methods agreed upon in Task 1.0. Such methods may include online surveys, public, forums, polling, focus groups, charettes, etc. Depending on the methods, CPTs will assist with input gathering for specific community or stakeholder groups.
- 3.4 Prepare community visioning summary for use in preparing the environmental scan/SWOT summary .

**DELIVERABLE**

- ◆ Community Visioning Summary.

**PHASE II: CITY MISSION, VISION, CORE VALUES**

**TASK 4.0: DEVELOP MISSION, VISION, VALUES**

**ACTIVITIES**

- 4.1 Prepare agenda and materials for facilitated work session(s) to address City mission, vision, and core values.
- 4.2 Schedule and conduct facilitated work session(s).
- 4.3 Based on the outcomes of the facilitated work session(s) prepare draft mission, vision, and core values statements for review and comment.
- 4.4 In collaboration with the City prepare final mission, vision, and core values statements.

**DELIVERABLE**

- ◆ Mission, Vision, Core Values.





## PHASE III: DEVELOPMENT OF THE PLAN

### TASK 5.0: PREPARE STRATEGIC PRIORITIES SUMMARY

#### ACTIVITIES

- 5.1 Consolidate input into the following categories:
  1. Community vision.
  2. Stakeholder perceptions.
  3. Perceptions of other key issues in the planning process.
  4. Perceptions of goals and objectives that should be included in the strategic plan.
- 5.2 Based on the results of Task 5.1, develop a short list of major strategic priorities.
- 5.3 Conduct work session to reach consensus on strategic priorities. The strategic priorities that are agreed upon will be used to develop strategic plan goals and objectives.

#### DELIVERABLE

- ◆ Strategic issues/priorities summary.

### TASK 6.0: PREPARE DRAFT STRATEGIC PLAN

#### ACTIVITIES

- 6.1 Prepare a draft strategic plan document based on the results and outcomes of former activities that include an executive summary, mission, vision, values, and goals and objectives.
- 6.2 Submit draft of strategic plan document for review and comment.
- 6.3 If necessary, schedule and conduct work session to discuss draft and determine necessary revisions.
- 6.4 Revise strategic plan.
- 6.5 Plan and conduct facilitated work session.

#### DELIVERABLE

- ◆ Draft strategic plan.

### TASK 7.0: PREPARE FINAL STRATEGIC PLAN

#### ACTIVITIES

- 7.1 In consultation with the City, make final revisions to draft strategic plan as needed.
- 7.2 Finalize strategic plan document and supplementary materials and submit to the City Project Officer.

#### DELIVERABLE

- ◆ Final strategic plan.



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## PHASE IV: MONITORING AND TRACKING

### TASK 8.0: DEVELOP IMPLEMENTATION/MONITORING FRAMEWORK

#### ACTIVITIES

- 8.1 Prepare draft implementation framework that assigns responsibility, accountability, resource requirements, key milestones, and performance metrics (key indicators/benchmarks) for strategic plan implementation.
- 8.2 Prepare recommendations related to structure, operations, and systems to support implementation.
- 8.3 Conduct organizational capacity and capability analysis and change readiness assessment that addresses implementation challenges and critical success factors.
- 8.4 Submit framework for review and comment.
- 8.5 Finalize implementation/monitoring framework including a calendar for tracking progress.
- 8.6 Provide technical support as needed to “roll-out” implementation.

#### DELIVERABLE

- ◆ Strategic plan implementation/monitoring framework.

### TASK 9.0: DEVELOP TEMPLATE FOR ACTION PLAN(S)

#### ACTIVITIES

- 9.1 Using the implementation/monitoring framework as a guide, develop an action plan template that can be used by the City to develop department-level action plans.
- 9.2 Submit action plan template for review and comment.
- 9.3 Finalize action plan template that becomes the mechanism to ensure implementation at the department level.
- 9.4 Provide support and technical assistance as needed.
- 9.5 Schedule and conduct quarterly and annual progress monitoring according to the calendar in Task 8.0. **(Optional)**
- 9.6 Provide annual report on implementation progress. **(Optional)**

#### DELIVERABLE

- ◆ Action Plan Template.



## EXPERTISE

In recent years MGT has conducted dozens of strategic planning projects similar to the City's requirements. Previous MGT strategic planning projects have featured organizing and facilitating meetings to address mission, vision, values, and other strategic plan components. Key stakeholders were engaged using multiple methods including key informant interviews, focus groups, community meetings, public workshops, surveys, and social media. MGT utilizes community and stakeholder engagement to solicit broad and diverse input to help inform mission, vision, and values as well as strategic priorities, goals, objectives, and strategies. Stakeholders included elected officials, staff, administrators, department heads, employees, board members, clients, the business community, and residents.

The range of strategic planning projects completed by MGT that have included similar requirements is diverse. For example, MGT's development of Miami-Dade County's (FL) first county-wide strategic plan included developing the County's mission, vision, values, goals, strategies, and objectives and required extensive coordination with eight internal teams and committees. At the time, the strategic plan MGT developed for Miami-Dade County was the largest strategic plan developed by a municipal government and included the County's 25,000 employees and over 100 incorporated and unincorporated cities and towns in the County. To facilitate input gathering, MGT established Community Planning Teams (CPTs) to help gain access and acceptance in Miami's diverse communities. Over 70 community outreach meetings were conducted throughout the County in English, Spanish, and Creole. MGT worked closely with eight strategic planning teams comprised of county staff to develop eight strategic master plans. Both the master plans and countywide strategic plan were designed to align with the County's budget. The Miami-Dade project featured MGT's largest-ever community and stakeholder input process including a community-wide event to solicit input on vision, mission, values, and strategic priorities that was attended by over 2,500 citizens. Although not on the same scale as the Miami-Dade County project, several years ago MGT conducted Nassau County's (FL) county-wide visioning process that involved extensive stakeholder and community input to reach consensus on a vision for the future and strategic priorities for addressing a diverse group of quality of life issues that impact work and play in Nassau County.

One of the distinct advantages MGT brings to a strategic planning project is the fact we are a full-service management consulting and research firm. As a result, there is no aspect of an organization's structure, operations, systems, and processes that we have not assisted organizations with, in order to improve operations functions and service delivery. Organizations we have developed strategic plans for have significantly benefited from our operations expertise in multiple areas. Some of the plans we have developed have focused on improving operations efficiency and effectiveness as a strategic goal or priority, which enabled MGT to utilize our business process re-engineering and process improvement expertise to shape goals, strategies, and performance metrics associated with operations efficiency and effectiveness. Similarly, we have used our extensive financial services expertise and experience to address resource allocation that impact administrative and program operations goals and strategies. Our IT expertise has been leveraged to address everything from cybersecurity to data management in support of technology related strategic plan goals and strategies. We've used our human capital expertise to address areas that impact operations such as professional development, compensation and classification, and reorganization to achieve greater operations efficiency and effectiveness.

To demonstrate the breadth of our experience, we provide a *sample* of MGT's strategic planning projects in **Exhibit 3**. Additional information is available on any of the projects.



Exhibit 3. Sample of Relevant Experience

CLIENT   PROJECT	STRATEGIC PLAN DEVELOPMENT	STRATEGIC PLAN IMPLEMENTATION	IMPLEMENTATION MONITORING AND EVALUATING
Alabama A&M University <i>Strategic Planning</i>	■	■	■
American Bible Society (NY) <i>Update of Strategic Plan</i>	■	■	
Appomattox Regional Library (VA) <i>Strategic Planning for Library System</i>	■		
Bethune-Cookman College (FL) <i>Strategic Planning and Organizational Review</i>	■	■	■
Black Belt Community Foundation (AL) <i>Organizational Priority Setting/Annual Board Retreats</i>	■	■	■
California Department of Child Support Services <i>Strategic Planning</i>	■	■	
California Department of Motor Vehicles <i>Strategic Planning</i>	■	■	
California High-Speed Rail Authority <i>Strategic Plan</i>	■		
California Secretary of State <i>Strategic Planning Services</i>	■		
Central Texas College District <i>Strategic Planning</i>	■		
Charlottesville City Schools (VA) <i>Strategic Planning</i>	■	■	
Council of New Jersey Grantmakers <i>Strategic Planning</i>	■	■	
County of Kaua'i (HI) <i>Facilitation, Strategic Planning, and Market Research and Analysis</i>	■	■	■
Delaware Health and Social Services <i>Development of a Five-Year Strategic Plan</i>	■	■	■
Edward Waters College (FL) <i>Strategic Planning/Organizational Review</i>	■	■	■
Edwards Aquifer Authority (TX) <i>Strategic Planning Services</i>	■		
Federation of Southern Cooperatives (GA) <i>Strategic Planning</i>	■	■	■
Florida A&M University <i>Strategic Plan Development</i>	■		
Florida Department of Children and Families <i>Stamp Out Hunger Five-Year Strategic Plan</i>	■	■	■
Florida Department of Juvenile Justice <i>Strategic Planning, Development of Statewide Prevention Plan</i>	■	■	■
Florida Division of Colleges and Universities <i>Strategic Planning Process</i>	■	■	
Georgia Technology Authority <i>Strategic Planning and SWOT Analysis</i>	■	■	■
Housing Authority of New Haven (CT) <i>Strategic Planning</i>	■	■	■
Housing Authority of Savannah (GA) <i>Strategic Planning</i>	■	■	■
Indianapolis Public Transportation Commission (IN) <i>Strategic Planning</i>	■	■	■
Indian River State College (FL) <i>Five-Year Strategic Plan for Banner Center for Homeland Security &amp; Defense</i>	■	■	
Jessie Ball duPont Fund (FL) <i>Strategic Planning/Technical Assistance to Community Advisory Committee</i>	■		■
Lyon County School District (NV) <i>Strategic Planning</i>	■		
Miami-Dade County (FL) <i>Comprehensive Strategic Plan</i>	■		
Napa County Library (CA) <i>Strategic Plan Development</i>	■		
Nassau County (FL) <i>Community Visioning</i>	■		
New Mexico Human Services Department <i>Strategic Planning</i>	■		
Norfolk State University (VA) <i>Strategic Planning</i>	■		■
Richmond Department of Economic Development (VA) <i>Strategic Plan</i>	■		



CLIENT   PROJECT	STRATEGIC PLAN DEVELOPMENT	STRATEGIC PLAN IMPLEMENTATION	IMPLEMENTATION MONITORING AND EVALUATING
Rochester Community and Technical College (MN) Strategic Plan	■		
Seminole County (FL) Strategic Planning	■		
Stockton-San Joaquin County Public Library System (CA) Strategic Planning	■	■	■
Tallahassee Girls Choir of CHOICE (FL) Board Strategic Planning Services	■	■	■
Tallahassee Housing Authority (FL) Board of Directors Retreat	■	■	■
The Piney Woods School (MS) Strategic Planning and Meeting Facilitation	■	■	■
University of Arkansas at Pine Bluff Strategic Plan Development	■	■	■
Virginia State University Strategic Planning	■	■	
Wakulla County Health Department (FL) Strategic Plan Technical Assistance	■		

REFERENCES

Client-to-client communication is always a valuable tool when determining the quality of services a firm offers. Below we offer contact information from previous clients and encourage City staff to contact these individuals to discuss the quality of service MGT offers.

<b>Earline Wesley Davis, Executive Director</b> Housing Authority of Savannah Strategic Planning	1407 Wheaton Street Savannah, GA 31404 912.235.5800   davis@savannahpha.com
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MGT facilitated development of the Housing Authority of Savannah’s (HAS) five-year strategic plan. To deliver on the HAS’s objective of developing a five-year strategic plan, MGT worked in collaboration with the HAS Board of Commissioners and staff to ensure successful completion of the project. Throughout the strategic planning process, MGT collected and analyzed a variety of data and information and soliciting input from stakeholders. The results of the data collection and input gathering resulted in a comprehensive SWOT analysis that was used in development of HAS’s strategic plan. Following successful completion of MGT’s work plan, the HAS has a comprehensive five-year strategic plan that identifies and addresses key issues and goals of the HAS, as well as an executive summary for public review and a final presentation. In addition, MGT provided an implementation framework for monitoring and reporting progress and updating the strategic plan.

<b>Julian Marsh, Executive Director</b> Gary Housing Authority Strategic Planning	578 Broadway, 2nd Floor Gary, IN 46402 219.881.6422   jmarsh@garyhousing.org
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MGT was engaged by the Gary Housing Authority (GHA) to review a partially completed strategic plan and to facilitate completion of the strategic plan in collaboration and coordination with senior staff and the board. To accomplish the objectives of the GHA, MGT used a two-phase approach. Phase I was the situation analysis, which assessed the work, previously completed, to help guide subsequent activities that needed to be completed to develop the strategic plan. This required collecting and reviewing the results of previous work and collaborating with senior staff. The end result of Phase I was a detailed and in-depth understanding of the current status in order to shape and guide the development of the strategic plan in the next phase. Phase II, strategic plan development, included planning, organizing, and facilitating a two-day strategic planning session



with senior staff to develop the strategic plan. The facilitated meeting was guided by the results of the situational analysis. The completion of the meeting resulted in agreed upon strategic priorities and goals, objectives, and strategies, which were incorporated into the final strategic plan.

As a follow-up to facilitating development of the strategic plan, MGT provided team building and coaching/mentoring to executive team members of the Authority. The primary focus was to assist the executive team to consistently function as “One Team” operating in the best interest of the “team” and the GHA at all times. This is critical in implementing GHA’s Strategic Plan and achieving its mission, “To serve as a catalyst for community redevelopment by providing affordable and market rate housing choices and economic opportunities.” To achieve its mission, GHA must undergo a fundamental transformation in its operations, processes, and systems that require the executive team to be on the same page at all times. GHA’s transformation is necessitated by changing HUD priorities, the changing status of public housing, and GHA’s vision to be “recognized as the premier property management and development organization in NW Indiana.”

**Cornelius Blanding, Executive Director** 2769 Church Street  
Federation of Southern Cooperatives East Point, Georgia 30344  
*Strategic Planning* 404.765.0991 | fsc@mindspring.com

MGT developed the Federation of Southern Cooperatives first strategic plan several years ago. The strategic planning process involved working closely with staff and board members. In addition, MGT solicited input from major funders. Most recently, MGT evaluated and updated the Federation of Southern Cooperatives strategic plan, which encompasses a four-state region. This included organizing and facilitating strategic planning sessions with staff and board members and soliciting perceptions and opinions from multiple stakeholders. The evaluation and update were conducted over four months and resulted in an updated strategic plan.

**Wayne Workman, Superintendent** 25 East Goldfield Avenue  
Lyon County School District Yerington, NV 89447  
*Strategic Planning* 775.463.6800 | wworkman@lyoncsd.org

MGT provided long-range strategic planning for District. The strategic plan, along with updated vision, mission, and values, created an actionable plan with five goals using broad-based community input. In guiding the development of the plan, the parameters were realistic and practical, established a vision for the future, were built with consensus on the essential mission, and were attainable and supported by strategies, objectives, and accountability mechanisms.

## PROJECT MANAGEMENT

### PROJECT MANAGEMENT

MGT follows a robust and comprehensive strategic planning process solidly rooted in industry best-practices and augmented by our decades of experience conducting these types of projects for government agencies and other public sector institutions. ***We are project management and strategic planning experts with a rich toolset that includes the leadership, facilitation, and data analysis skills the City’s needs to ensure successful planning activities that yield sustainable, actionable plans to meet your objectives now and into the future.***

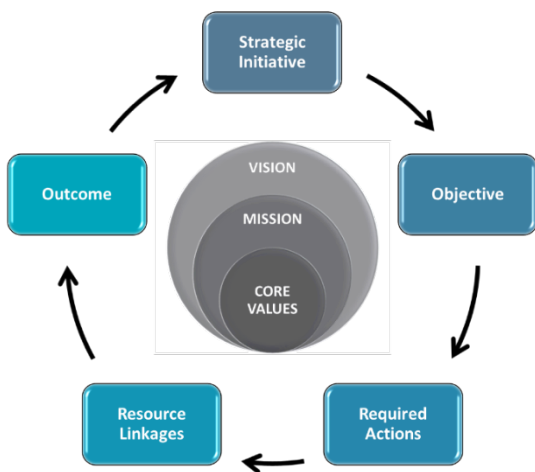


**PROJECT MANAGEMENT:** *This project will require expert project management and execution.* Dr. Fred Seamon, who has extensive strategic planning and project management experience, will be responsible for project management. He has developed numerous strategic plans for public sector clients that have included collaborating with commissioners, staff, and other key stakeholders. To ensure the deliverables are of the highest caliber, Dr. Seamon will be directly involved in all project phases. Our team of experts share a common vision and project goals that will be reflected in the efficiency, coordination, and high quality of our work.

**PROJECT EXECUTION:** *Project execution must be flawless and efficient.* MGT will conduct weekly progress meetings with our consultant team to ensure tasks and activities are being completed on schedule. As necessary, adjustments to our approach will be made to guarantee the project is executed effectively and adheres to the project schedule and deliverables. MGT’s established communication protocols will set clear roles and responsibilities for each team member so we have the same project vision and work together to achieve this vision.

**COMMUNICATION STRATEGIES:** *Communication, collaboration, and coordination between MGT and the City is essential to success.* MGT will work closely with City staff during project initiation to ensure clarity and consensus about the schedule, deliverables, expected outcomes, and working relationships before moving forward. We will develop a mutually agreeable schedule for review and comment.

**PROJECT MANAGEMENT TOOLS:** Our project managers use Mavenlink, a project management and monitoring software tool to develop and track key components of the project, such as project schedule, resources, timelines, risks, and milestones. This tool enables us to visually communicate with our clients on the project’s progress. The work plan may be adjusted if additional information is acquired between submission and project start date. From the work plan, the MGT team will develop a detailed schedule. The detailed work plan and schedule identifies (1) what needs to be done to achieve the objectives, (2) the work dependencies (critical path of activities), (3) the timeframe in which the work is to be completed, (4) roles and responsibilities to accomplish the work, and (5) potential issues and risk mitigation strategies. The planning phase is crucial to ensure successful development of quality work products in an efficient manner, and it will ensure the entire team shares a common vision for the project.



We believe the close partnership between the City and MGT is critical to make certain all deliverables are expertly met. Most important, this partnership is critical because realistic strategic plans cannot be developed in a vacuum or in isolation. We strongly believe it is important to have ample collaboration throughout the

## COMPANY ADVANTAGE

### Approach



The best results come from working in collaboration and partnership to achieve your objectives.

### Project Management



Our clients are never left to wonder about any detail of the project. Communication is the key to effective project management.

### Personnel



No other single factor is as important as the professional staff providing the analysis and managing the project.



strategic planning process. As such, it is essential to have the fingerprints of the City and key stakeholders at appropriate touch points during strategic planning.

Our proposed project management and quality assurance methodology seeks to ensure a clear communication flow, and the involvement and consensus-building of relevant stakeholders. Because our consultants work in diverse, multi-disciplinary teams, they have vast experience in avoiding information bottlenecks or unintended exclusions. Specifically, the MGT project management approach to client communication and successful project delivery features five components:



**1** MGT’s project director will work closely with the City’s point of contact. Our experience has shown this allows the client to ensure the consulting team is focused on resolving any key problems that may arise. After the designation of the project officer, MGT’s project director works with that individual to create a customized, achievable schedule and set of incremental goals for the project. Finally, MGT project directors are accustomed to issues surfacing during the project and are experienced in working with their client project officer to arrive at satisfactory resolutions in a timely manner that avoid derailing the project.

**2** Our project director will agree to a set of concrete, incremental milestones to provide the City an objective measure of progress during the project. In effect, this component serves to provide a blueprint of the qualitative and quantitative information needed by MGT to conduct its work and produce its deliverables within established timeframes. It keeps the MGT project team accountable to a schedule, but also helps the City clearly understand the information it needs to provide to help the consultant team adhere to its schedule.

**3** At the onset of the project, the City’s Project Officer and the MGT project team agree on the breadth and depth of stakeholder engagement. Our consulting teams have broad experience in all feedback strategies – from targeted focus groups of key stakeholders to broad-based community input. In addition to determining the scope of feedback required, our Project Director will work with the City’s Project Officer to develop a clear schedule of feedback for key stakeholders that is organizationally and politically feasible. We work closely with our City’s Project Officer to satisfactorily involve all who have a stake in the project’s success.

**4** Once milestones and a feedback strategy are selected, we will work with the City to find a format for continuous feedback that keeps the City’s Project Officer regularly informed of key activities and preliminary issues. Right from the start, we work with the Project Officer to: a) structure a format that will serve as the template for continuous communication; and b) agree upon the time frame for updates. Having structured communication strengthens the focus of our work and allows for quick recovery from unexpected obstacles.

**5** Our project team recognizes every client has a unique organizational culture. We will proactively work with the City’s Project Officer to get a sense of the constraints and opportunities. Our goal is to provide insight that delivers impact in the City’s setting, not in a theoretical one.





## STAFFING PLAN

MGT has the breadth and depth of staff resources and expertise to plan, organize, and facilitate development of the City’s strategic plan and can begin work immediately upon notification to do so. MGT is proposing a team of senior level consultants who have worked together on similar projects and understands what is required to fulfill the scope of work requirements outlined in the RFP. We recognize the ultimate strength of any strategic planning project we conduct depends on the qualifications and abilities of our project team as well as the structure and organization of the strategic planning team. Therefore, we are proposing a team whose combined skillset and experience align with the City’s scope of services and deliverables.

In addition to MGT’s well-qualified staff, we are partnering with **Quest Corporation of America (Quest)**. Quest is a woman-owned, DBE, M/WBE certified firm celebrating 25 years of serving Florida’s infrastructure communications needs. Quest has a long history of facilitating public meetings and stakeholder sessions, performing outreach to the community, and working with city staff and elected officials. For this project, Quest will support MGT’s effort with the public meetings, stakeholder sessions, and overall community outreach. Quest is currently supporting the FDOT District Six Construction Office, where they are providing community outreach on various districtwide projects including the ongoing Cow Key Channel Bridges Rehabilitation Project and the upcoming Islamorada Founders Park Pedestrian Bridge Project.

Some of the key attributes of our team are described below:

- ◆ The team is comprised of professionals with extensive experience developing strategic plans for cities, counties, and other local agencies.
- ◆ These individuals are experts in planning, organizing, and facilitating participatory stakeholder engagement in Monroe County.
- ◆ We are fully prepared to mobilize our resources to complete this project within 10 months. If necessary, we have the flexibility and capacity to add additional staff to our team.





**Exhibit 4** describes the assignment and related responsibilities of the project team members. Resumes of assigned personnel follow.

*Exhibit 4. Roles and Responsibilities*

ROLE	RESPONSIBILITIES
CITY OF KEY WEST PROJECT MANAGER	<ul style="list-style-type: none"> <li>– Exercise primary authority over the project.</li> <li>– Provide guidance on project activities, work plan, schedule, and deliverables.</li> </ul>
MGT PROJECT DIRECTOR	<ul style="list-style-type: none"> <li>– Plan and conduct project kickoff activities with the City.</li> <li>– Oversee project planning, staffing, and work assignments outlined in MGT’s proposed work plan to meet the scope of work requirements.</li> <li>– Prepare/review interim, draft, and final deliverables.</li> <li>– Collaborate with the City in coordinating and facilitating internal and stakeholder input and data gathering.</li> <li>– Facilitating strategic planning work sessions.</li> <li>– Organize and lead development of draft and final strategic plan.</li> </ul>
MGT TEAM MEMBERS	<ul style="list-style-type: none"> <li>– Participate in project kickoff activities.</li> <li>– Execute tasks and activities as outlined in the final workplan to meet all scope of work requirements.</li> <li>– Participate in strategic planning work sessions.</li> <li>– Assist in the preparation of draft deliverables.</li> <li>– Assist in the preparation of the draft and final strategic plan.</li> </ul>



## FRED SEAMON, Ph.D.

Project Director

EXECUTIVE VICE PRESIDENT | MGT CONSULTING GROUP



With **over 30 years** of consulting, research, and teaching experience, Dr. Seamon has extensive experience providing strategic planning and other consulting services to public and nonprofit agencies including public assistance agencies, children and family services agencies, local workforce boards, school districts, and colleges and universities. ***Dr. Seamon is a recognized expert in facilitating strategic planning processes and has developed strategic plans for local government agencies, state agencies, and nonprofit organizations in Florida and other states. For example he has developed strategic plans for local workforce boards in Florida and Hawaii and led development of Miami Dade County's strategic plan, one the largest municipal strategic planning projects ever conducted.*** He was the project director for the Nassau County (FL) Visioning Plan, Seminole County (FL) Strategic Plan, the Delaware Division of Developmental Disabilities Strategic Plan, the State of Florida Stamp Out Hunger Strategic, the New Mexico Department of Human Services Working Disabled Adult Strategic Plan, the Florida Department of Juvenile Justice Statewide Prevention Strategic Plan. In the last several years, he has facilitated a dozen or more strategic planning and visioning projects for a diverse range of public and nonprofit organizations including the Black Belt Community Foundation, ElderStyle Initiative, Miami Children's Initiative, Housing Authority of the City of New Haven, Gary Housing Authority, Savannah Housing Authority, Fulton County Human Services Department, and the Federation of Southern Cooperatives. Most recently, he was project director for strategic planning projects at the Lyon County School District, Palm Beach State College, Westfield State University, and the University of Arkansas at Pine Bluff. Currently he is facilitating strategic planning projects for two higher education institutions, a public transit authority, and a public housing authority. In addition, he has provided strategic planning and a variety of technical assistance to over a dozen Caribbean countries and Belize and Costa Rica in Central America.

### AREAS OF EXPERTISE

- ◆ Qualitative research methods.
- ◆ Strategic planning.
- ◆ Facilitation and consensus building.
- ◆ Community engagement and outreach.
- ◆ Policy analysis.
- ◆ Analyzing organization structure, operations, and processes.

### EDUCATION

Ph.D., Higher Education Administration, College of Education, Florida State University, 1976  
 M.S.W., School of Social Work, Florida State University, 1973  
 B.S., Sociology, Bethune-Cookman College, 1970  
 Certified Mediator, Certified by Supreme Court of Florida, #06465c

### PROFESSIONAL AFFILIATIONS

American Evaluation Association  
 American Society of Public Administration  
 Florida Academy of Certified Mediators  
 International Personnel Management Association  
 National Association of Social Workers  
 Southeast Evaluation Association  
 National Association of Workforce Development Professionals

### SAMPLE OF RELEVANT EXPERIENCE

<p>Black Belt Community Foundation (AL)   Strategic Planning Technical Assistance</p> <p>City of Marathon (FL)   Public Involvement Strategies and Facilitation</p> <p>Florida Department of Children and Families   Stamp Out Hunger Five-Year Strategic Plan; Food Stamp Error Reduction Strategies</p> <p>Florida Department of Juvenile Justice   Strategic Planning and Development of Statewide Prevention Plan</p> <p>Housing Authority of Savannah (GA)   Strategic Planning</p>	<p>Lyon County School District (NV)   Strategic Plan</p> <p>Maui County Workforce Investment Board (HI)   Assessment of Employer and Workforce Needs</p> <p>Miami-Dade County (FL)   Comprehensive Strategic Plan</p> <p>Nassau County (FL)   Visioning Plan</p> <p>Palm Beach State College (FL)   Strategic Planning Services</p> <p>Housing Authority of Savannah (GA)   Strategic Planning</p> <p>Seminole County (FL)   Strategic Planning</p> <p>Tallahassee Girls Choir of CHOICE (FL)   Board Strategic Planning Services</p> <p>Workforce Central Florida   Employer Study</p>
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## R. RAY THOMPSON, Ph.D.

Stakeholder Engagement  
VICE PRESIDENT | MGT CONSULTING GROUP



Dr. Thompson has **29 years of experience** specializing in strategic planning and studies utilizing both qualitative and quantitative research methods. His work at MGT has encompassed a wide range of **strategic planning and market research-oriented projects** for higher education institutions and education-related entities across the country. **Dr. Thompson has directed or participated in more than 500 project engagements. He has planned and coordinated the stakeholder research activities for many of those projects.**

In past 5 years he has played a major role on a half dozen strategic planning projects for colleges and universities. During his tenure with MGT, Dr. Thompson has developed and refined the assessment model MGT now employs for academic program needs and market studies. In addition, Dr. Thompson has led hundreds of focus group and small group discussions and input sessions for college and university planning as well as customer and stakeholder research.

### AREAS OF EXPERTISE

- ◆ Stakeholder Engagement
- ◆ Qualitative and Quantitative Research

- ◆ Facility Assessments
- ◆ Academic Program Needs Assessments

### EDUCATION

Ph.D., Communications, Florida State University, 1983  
M.S., Communications, Florida State University, 1978  
B.S., Social Psychology, Florida State University, 1975

### PROFESSIONAL AFFILIATIONS

American Association of Public Opinion Research  
American Marketing Association  
Market Research Association

### SAMPLE OF RELEVANT EXPERIENCE

Alabama A & M University/Strategic Planning  
Central Texas College District | Strategic Planning  
Education Coalition Task Force of the Cape Girardeau Chamber of Commerce (MO) | Needs Assessment and Market Study  
Florida State University | Comprehensive Study of the Medical Education System in Florida  
Florida State University | Medical Education Programs Expansion Study  
Fort Valley State University/Strategic Planning  
Minnesota State Colleges and Universities | Comprehensive Program Needs Assessment; Higher Education Needs and Capacity in Southwest Minnesota; Statewide Education Needs Assessment  
Norfolk State University (VA) | Strategic Planning  
Old Dominion University (VA) | Program Needs Assessments of Three Regional Campuses  
Palm Beach State College/Strategic Planning  
Rensselaer Polytechnic Institute (NY) | Comprehensive Market Study  
Rochester Community and Technical College (MN) | Strategic Planning Services

Southern Connecticut State University | Market Research Study  
Sul Ross University (TX) | Comprehensive Needs Assessment and Educational Market Analysis  
Tarleton State University, Central Texas Center | Market Analysis and Academic Needs Assessment  
The University System of New Hampshire's College of Lifelong Learning | Needs Assessment and Market Study  
University of Arkansas at Pine Bluff/Strategic Planning  
University of Central Florida | Medical School Needs Analysis  
University of Virginia and Virginia Tech | Market Assessment of Higher Education Needs  
Virginia State University | Strategic Planning  
Washington Higher Education Coordinating Board | Postsecondary Education Needs Assessment  
West Texas A&M University | Market Analysis and Needs Assessment  
West Virginia State College and University System | Needs Assessment of Graduate Engineering Programs



# KARINDA BARRETT, Ph.D.

Stakeholder Engagement  
SENIOR CONSULTANT | MGT CONSULTING GROUP



Dr. Barrett has **over 25 years** of higher education, policy development, faculty and professional development, and **strategic planning** including student housing experience. Previously, Dr. Barrett served as the Associate Vice Chancellor for Academic and Student Services with the Division of Florida Colleges. For eleven years, she worked at Tallahassee Community College, first as an Instructional Technologist and then as the Director of the Center for Professional Enrichment. Prior to her work at TCC, she was the Associate Director of the Hardee Center for Women in Higher Education and served as an advisor at the Center for Advising Undeclared Students during her graduate work. She was an Area Coordinator for Residence Life at Western Carolina University and a Residence Education Coordinator at the University of South Carolina.

**Dr. Barrett has engaged in strategic planning projects where she developed mission, vision, values and strategic goals. She has also played a major role in collecting stakeholder input through multiple channels such as interviews, focus groups, workshops, and surveys.** She has worked with constituents, staff, families, employers, advisory boards, and a variety of other local, regional, and national stakeholders to curate essential feedback, insight, and input for strategic plan development. Most recently her consulting work include strategic plan development projects for the Florida State University College of Medicine and Chicago State University.

### AREAS OF EXPERTISE

- ◆ Policy Development
- ◆ Strategic Planning
- ◆ Faculty and Professional Development

- ◆ Stakeholder Engagement
- ◆ Process Improvement
- ◆ Student Housing

### EDUCATION

Ph.D. Higher Education, Department of Educational Leadership, Florida State University, December 2004  
 M.Ed., Educational Leadership and Policies Department, University of South Carolina, May 1994  
 B.S., Business Administration, University of South Carolina, December 1990  
 Certificate, Certified College Professional, Association of Florida Colleges, November 2012  
 Certificate, Strengths Advocate, Clifton Strengths School, Gallup University, July 2011  
 Certificate, Online Instructional Development, Educational Psychology and Learning Systems Department, Florida State University, May 2001

### PROFESSIONAL AFFILIATIONS

National Institute of Staff and Organizational Development, Liaison, 2008-2015  
 Florida Faculty Development Consortium, Steering Committee Member, 2005 – 2008, Chair, 2008-2011  
 Southern Regional Faculty Instructional Developer Consortium, Executive Committee Member, 2007-2009  
 Florida Association of Community Colleges, TCC Chapter, Publications Co-Chair, 2005 - 2006  
 Florida Distance Learning Consortium, Faculty Development Committee, Member, 2004 - 2005  
 Tallahassee Community College Women’s History Planning Committee, Member, 2004- 2007

### SAMPLE OF RELEVANT EXPERIENCE

College of Lake County (IL) | Market Study  
 Inter American U of Puerto Rico (FL) | Feasibility/Impact  
 University of Nevada, Las Vegas (NV) | Strategic Planning  
 Bowie State University (MD) (Sub: Balfour Beatty) | Stakeholder Survey  
 Chicago State University (IL) | Strategic Planning Services  
 Guilford Technical Community College (NC) | Training

Oregon Health Insurance Marketplace | Demographics Study  
 Texas A&M University-Corpus Christi | Strategic Plan West  
 Chester University (PA) | Market Due Diligence  
 State College of Florida | Strategic Planning  
 Laramie County School District (WY) | Strategic Planning



QUEST CORPORATION OF AMERICA

## **Bryce Peacher** Community Outreach Specialist

### Experience – (10) Years

Bryce Peacher is a talented communications professional with a diverse background that includes transportation and construction, agriculture, manufacturing, healthcare, higher education, politics and the beauty industry. He also has extensive experience in media relations, working with print and electronic media locally, nationally and internationally. Mr. Peacher delivers creative and engaging solutions for marketing, brand identity, advertising, digital media and web development, with specific passions for branding, messaging, internal communications, content development and digital media production.

### RELEVANT PROJECT EXPERIENCE

#### **FDOT District Six – SR 5/US 1/Overseas Hwy over Cow Key Channel Bridges Rehabilitation Project**

*Monroe County, FL (January 2020 – Present)*

Mr. Peacher regularly participates in meetings with city and county officials, as well as with community groups and newspaper editorial boards – this includes assisting with coordinating and participating in the project public information meeting. Mr. Peacher supports the community outreach for this construction project by creating the project mailing list for elected and appointed officials as well agency, industry and community stakeholders. He also developed a mailing database by making door to door visits to property owners and occupants along the project corridor. Mr. Peacher also monitors the project site for potential issues and creates multimedia content to update the community about the project.

#### **FDOT District Six – SR 5/US 1/Overseas Hwy at Islamorada Founders Park Pedestrian Bridge Design/Build Project**

*Monroe County, FL (Summer 2020 – Present)*

Mr. Peacher is creating the project mailing list for elected and appointed officials, as well agency and community stakeholders along the project corridor. He is creating the community awareness plan and all collaterals for the project including fact sheets and outreach letters.

#### **FDOT District Six – SR 5/US 1/Brickell Avenue Bridge Rehabilitation Project**

*Miami-Dade County, FL (January 2020 – Present)*

Mr. Peacher monitors the feedback by participating in meetings with industry groups. He also researched and created event calendars to use in construction planning and coordinated the mailing of a project fact sheet and good neighbor letter to project stakeholders and the community along the project corridor.

#### **FDOT District Six – SR 5/US 1/Biscayne Boulevard Safety Improvement Project**

*Miami-Dade County, FL (January 2020 – Present)*

Mr. Peacher assisted with coordinating and participating in the public information meeting for the project. He also researched and created event calendars to use in construction planning and coordinated the mailing of a project fact sheet and dear neighbor letter to project stakeholders and the community along the project corridor. Additionally, Mr. Peacher supported the community outreach efforts for this construction project by monitoring community feedback and participating in meetings with industry groups.

### EDUCATION

- M.S., Marketing (Candidate), Heriot-Watt University, 2021
- Management Certificate, Leadership & Marketing, University of Florida
- B.A., History & Art History, University of Hull

### PROFESSIONAL DEVELOPMENT

- Digital Video Production Certificate, Boulder Digital Arts Academy
- Management and Leadership Training, Purdue University



QUEST CORPORATION OF AMERICA

## **Maria Camacho**

### Senior Community Outreach Specialist

#### Experience – 20 Years

Maria Camacho is a communications professional with two decades of experience as a writer, reporter, public relations and marketing representative in a variety of outlets including newspaper, magazine and online including the Miami Herald and Hispanic Magazine. She is adept at developing integrated communications campaigns to promote issues, strengthen brands and grow community support. Most recently, she managed the implementation of five safety campaigns as project manager for the Florida Department of Transportation (FDOT) District Six. Ms. Camacho led communication initiatives as communications manager and interim vice president of marketing at Miami-Dade's official economic development organization, the Beacon Council, and created and initiated marketing campaigns that promoted alternative modes of transportation as senior marketing manager at South Florida Commuter Services, a project of the FDOT.

#### PROJECT EXPERIENCE

##### **City of Miami Beach Office of Capital Improvement Projects, Venetian Islands Neighborhood Improvement Project**

*Miami Beach, FL (September 2018 – Present)*

Ms. Camacho currently supports public information activities on the high-profile capital improvement project on Venetian Islands in the City of Miami Beach. In this role, she is responsible for providing day-to-day coordination between affected stakeholders and the project teams. She also develops a wide array of project collaterals including construction advisories. She supports the coordination and facilitation of public meetings and special events and works closely with her project team to coordinate construction activities with the general public.

##### **City of Miami Beach Office of Capital Improvement Projects, Lincoln Road Design/Build Project**

*Miami Beach, FL (September 2018 – Present)*

Ms. Camacho currently supports public information activities on the upcoming Lincoln Road District Improvements project. She is responsible for maintaining detailed business logs and responding to stakeholder concerns as well as supporting public events.

##### **FDOT District Six, Palmetto Express Lanes Project**

*Miami-Dade (May 2019 - Present)*

Ms. Camacho currently supports public information activities for the FDOT District Six Palmetto Express Lanes Project by updating and distributing daily project updates and communication/coordination with affected stakeholders. She recently created a communications and advertising plan for the upcoming short-term express lanes project modifications.

##### **Florida Department of Transportation (FDOT) Statewide, Construction Careers Consulting**

*Florida, Statewide (Jan. 2020 – Present)*

Ms. Camacho serves as support community outreach specialist for the Florida Department of Transportation (FDOT) Construction Careers program, acting on behalf of the Florida Department of Transportation in its efforts to recruit workforce and champion the On-the-Job Training Program, support Construction Career Days and Adult Career Fair events. She helps support the placement and recruitment of candidates for FDOT's Construction Careers Program and partnerships with FDOT contractors statewide.

##### **FDOT District Six, Five Comprehensive Safety Campaigns**

*Miami-Dade and Monroe counties (October 2017-April 2019)*

As project manager at Quest Corporation of America, Ms. Camacho was responsible for developing and implementing five comprehensive safety campaigns, and managing the safety team of three community outreach specialists.

#### EDUCATION

- Florida International University, Bachelor of Science, Print Journalism
- Miami Dade College, Associate of Arts, Print Journalism

#### ONLINE COURSES

- Investigative Journalism for the Digital Age - Knight Center Massive Open Online Courses (MOOC)
- Social Media for Journalists – Knight Center MOOC



## PROJECT SCHEDULE

Based on the RFP requirements and previous experience facilitating strategic plans, MGT proposes to complete the project within 10 months, as illustrated in **Exhibit 5**.

*Exhibit 5. Project Schedule*

WORK TASKS	MONTH 1	MONTH 2	MONTH 3	MONTH 4	MONTH 5	MONTH 6	MONTH 7	MONTH 8	MONTH 9	MONTH 10
<b>PHASE I: Situation Assessment</b>										
1.0 Conduct Project Initiation	█	█	█							
2.0 Conduct Env. Scan/SWOT Analysis		█	█	█	█	█	█			
3.0 Community Visioning				█	█	█	█	█	█	
<b>PHASE II: City Mission, Vision, Core Values</b>										
4.0 Prepare Mission and Vision Statements							█	█	█	
<b>PHASE III: Development of the Plan</b>										
5.0 Prepare Strategic Priorities Summary								█	█	█
6.0 Prepare Draft Strategic Plan									█	█
7.0 Prepare Final Strategic Plan										█
<b>PHASE IV: Monitoring and Tracking</b>										
8.0 Develop Implemen./Monitoring Framework							█	█		█
9.0 Develop Template for Action Plans							█	█	█	█





## 2. REQUIRED FORMS AND AFFIDAVITS

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Included in this section are the following required forms and affidavits:

- ◆ Proposer Qualifications Statement
- ◆ Anti-Kickback Affidavit
- ◆ Non-Collusion Affidavit
- ◆ Sworn Statement – Public Crimes
- ◆ Indemnification Form
- ◆ Equal Benefits for Domestic Partner Affidavit
- ◆ Cone of Silence Affidavit
- ◆ Proposer Checklist
- ◆ Contract Information

# PART 2

## FORMS AND AFFIDAVITS

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### PROPOSER'S QUALIFICATION STATEMENT

The undersigned certifies under oath that the information provided herein is true and sufficiently complete so as not to be misleading.

PROJECT NAME: Strategic Planning Services

SUBMITTED TO: The City of Key West  
1300 White Street  
Key West, FL 33040

SUBMITTED BY:

Company Name:	<u>MGT of America Consulting, LLC</u>	Corporation	<u>    </u>
Company Website:	<u>www.mgtconsulting.com</u>	Partnership	<u>    </u>
Principle's Name:	<u>Fred Seamon</u>	Individual	<u>    </u>
Principle's Title:	<u>Executive Vice President</u>	Joint Vent	<u>    </u>
Address 1:	<u>4320 W. Kennedy Blvd., Ste. 200</u>	Other	<u>LLC</u>
Address 2:	<u>Tampa, FL 33609</u>		
Contact Email:	<u>FSeamon@mgtconsulting.com</u>		


LICENSING:

State of Florida License No. FL Dept. of State License #L15000199435 Expires 12/31/2020  
City of Tampa, FL Control #731215 9/30/2020

PROPOSER REFERENCES: List references, including contact name of whom we may call.

Reference List			
Reference	Contact Name	Phone	Email
Housing Authority of Savannah (GA)	Earline Wesley Davis	912.235.5800	davis@savannahpha.com
Gary Housing Authority (IN)	Julian Marsh	219.881.6422	jmarsh@garhousing.org
Federation of Southern Cooperatives (GA)	Cornelius Blanding	404.765.0991	fsc@mindspring.com
Lyon County School District (NV)	Wayne Workman	775.463.6800	wworkman@lyoncsd.org

I certify under oath that all the information herein is true.

  
 Signature Fred Seamon  
 Executive Vice President

State of Florida  
 County of LEON

Sworn to (or affirmed) and subscribed before me this 16<sup>th</sup> day of March, 2020

By Fred Seamon



  
 Signature of Notary

Personally Known X

Produced Identification \_\_\_\_\_

Type Produced \_\_\_\_\_

Shannon Blakey  
 Print



**NON-COLLUSION AFFIDAVIT**

STATE OF FLORIDA            )  
  ): SS  
COUNTY OF LEON            )

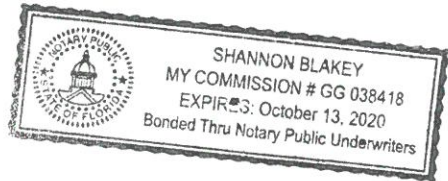
I, the undersigned hereby declares that the only persons or parties interested in this Proposal are those named herein, that this Proposal is, in all respects, fair and without fraud, that it is made without collusion with any official of the Owner, and that the Proposal is made without any connection or collusion with any person submitting another Proposal on this Contract.

By: *Fred Seamon*  
Fred Seamon  
Executive Vice President

Sworn and subscribed before me this  
16<sup>th</sup> day of March, 2020.

*S Blakey*  
NOTARY PUBLIC, State of Florida at Large

My Commission Expires: 10-13-2020



**SWORN STATEMENT UNDER SECTION 287.133(3)(a)  
FLORIDA STATUTES ON PUBLIC ENTITY CRIMES**

**THIS FORM MUST BE SIGNED IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICE AUTHORIZED TO ADMINISTER OATHS.**

1. This sworn statement is submitted with Bid, Bid or Contract No. RFP #005-20 for  
Strategic Planning Services

2. This sworn statement is submitted by MGT of America Consulting, LLC  
(Name of entity submitting sworn statement)

whose business address is 4320 W. Kennedy Blvd., Ste. 200, Tampa, FL 33609  
and (if applicable) its Federal  
Employer Identification Number (FEIN) is 81-0890071 (If the entity has no FEIN,  
include the Social Security Number of the individual signing this sworn statement.)

3. My name is Fred Seamon and my relationship to  
(Please print name of individual signing)

the entity named above is Executive Vice President.

4. I understand that a "public entity crime" as defined in Paragraph 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including but not limited to, any Bid or contract for goods or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, material misrepresentation.

5. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1)(b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment information after July 1, 1989, as a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.

6. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), Florida Statutes, means

1. A predecessor or successor of a person convicted of a public entity crime: or

2. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

7. I understand that a "person" as defined in Paragraph 287.133(1)(8), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter

into a binding contract and which Bids or applies to Bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

8. Based on information and belief, the statement, which I have marked below, is true in relation to the entity submitting this sworn statement. (Please indicate which statement applies.)

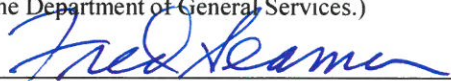
Neither the entity submitting this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, nor any affiliate of the entity have been charged with and convicted of a public entity crime subsequent to July 1, 1989.

The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989, AND (Please indicate which additional statement applies.)

There has been a proceeding concerning the conviction before a hearing of the State of Florida, Division of Administrative Hearings. The final order entered by the hearing officer did not place the person or affiliate on the convicted vendor list. (Please attach a copy of the final order.)

The person or affiliate was placed on the convicted vendor list. There has been a subsequent proceeding before a hearing officer of the State of Florida, Division of Administrative Hearings. The final order entered by the hearing officer determined that it was in the public interest to remove the person or affiliate from the convicted vendor list. (Please attach a copy of the final order.)

The person or affiliate has not been put on the convicted vendor list. (Please describe any action taken by or pending with the Department of General Services.)

  
\_\_\_\_\_  
(Signature)  
Fred Seamon, Executive Vice President

STATE OF FLORIDA (Date) 3/16 2020

COUNTY OF LEON

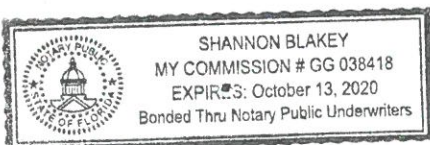
PERSONALLY, APPEARED BEFORE ME, the undersigned authority,

Fred Seamon  
\_\_\_\_\_  
(Name of individual signing)

who, after first being sworn by me, affixed his/her signature in the

space provided above on this 16th day of March, 2020.

My commission expires: 10-13-2020 S Blakey  
NOTARY PUBLIC



**INDEMNIFICATION**

To the fullest extent permitted by law, the CONSULTANT expressly agrees to indemnify and hold harmless the City of Key West, their officers, directors, agents, and employees (herein called the "indemnitees") from liabilities, damages, losses and costs, including, but not limited to, reasonable attorney's fees and court costs, such legal expenses to include costs incurred in establishing the indemnification and other rights agreed to in this Paragraph, to persons or property, to the extent caused by the negligence, recklessness, or intentional wrongful misconduct of the CONSULTANT, its Sub-consultants or persons employed or utilized by them in the performance of the Contract. Claims by indemnitees for indemnification shall be limited to the amount of CONSULTANT's insurance or \$1 million per occurrence, whichever is greater. The parties acknowledge that the amount of the indemnity required hereunder bears a reasonable commercial relationship to the Contract and it is part of the project specifications or the bid documents, if any.

The indemnification obligations under the Contract shall not be restricted in any way by any limitation on the amount or type of damages, compensation, or benefits payable by or for the CONSULTANT under workers' compensation acts, disability benefits acts, or other employee benefits acts, and shall extend to and include any actions brought by or in the name of any employee of the CONSULTANT or of any third party to whom CONSULTANT may subcontract a part or all the Work. This indemnification shall continue beyond the date of completion of the work.

: MGT of America Consulting, LLC

SEAL:

4320 W. Kennedy Blvd., Ste. 200, Tampa, FL 33609  
Address

  
Signature

Fred Seamon  
Print Name

Executive Vice President  
Title

3/18/2020  
Date



**EQUAL BENEFITS FOR DOMESTIC PARTNERS AFFIDAVIT**

STATE OF FLORIDA )  
: SS  
COUNTY OF LEON )

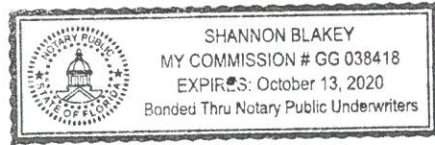
I, the undersigned hereby duly sworn, depose and say that the firm of MGT of America Consulting, LLC provides benefits to domestic partners of its employees on the same basis as it provides benefits to employees' spouses per City of Key West Ordinance Sec. 2-799.

By: Fred Seamon  
Fred Seamon  
Executive Vice President

Sworn and subscribed before me this

16<sup>th</sup> day of March, 2020.

S. Blakey  
NOTARY PUBLIC, State of Florida at Large



My Commission Expires: 10-13-2020

**CONE OF SILENCE AFFIDAVIT**

STATE OF FLORIDA )  
 : SS  
COUNTY OF LEON )

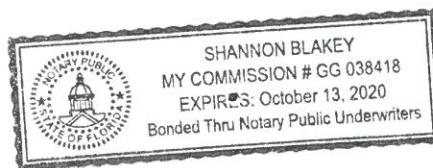
I the undersigned hereby duly sworn depose and say that all owner(s), partners, officers, directors, employees and agents representing the firm of MGT of America Consulting, LLC have read and understand the limitations and procedures regarding communications concerning City of Key West issued competitive solicitations pursuant to City of Key West Ordinance Section 2-773 Cone of Silence (attached).

*Fred Seamon* Fred Seamon  
(signature) Executive Vice President  
3/18/2020  
(date)

Sworn and subscribed before me this

16th Day of March, 2020.

*S. Blakey*  
NOTARY PUBLIC, State of Florida at Large



My Commission Expires: 10-13-2020

## PROPOSER'S CHECKLIST

(Note: The purpose of this checklist is to serve as a reminder of major items to be addressed in submitting a proposal and is not intended to be all inclusive. It does not alleviate the proposer from the responsibility of becoming familiar with all aspects of these Documents and proper completion and submission of his proposal.)

1. All included documents thoroughly read and understood.   X
  
2. Addenda acknowledged.   X
  
3. Qualification Form filled out.   X
  
4. Responses submitted in the following order:   X  
  - a. Cover Letter *Per answers to questions:*
  - b. Table of Contents *1. Cover Letter*
  - c. Executive Summary *2. Table of Contents*
  - d. Qualification Statement *3. Scope of Work (Proposal)*
  - e. Required Forms & Affidavits *4. Required Forms & Affidavits*
  - f. Addendum acknowledgment *5. Pricing*  
*6. Addendum Acknowledgement*
  
5. Proposer familiar with federal, state and local laws, ordinances, rules and regulations affecting performance of the work. Yes
  
6. Proposal submitted in sealed envelope and addressed and labeled in conformance with the instruction in the RFP. Yes

**CONTRACT**

The selected proposer will be expected to execute a contract with the CITY within 30 days of Notice to Award. If the contract cannot be successfully negotiated, the CITY may elect to negotiate with the second ranked proposer and so forth.

**SUBMITTAL OF PROPOSER**

Proposals shall stipulate that the proposed terms are valid for one-hundred and twenty (120) days from the date of submittal. Proposals must be signed by an official who has legal authority to bind the individual or form.

**CITY MAILING ADDRESS**

All proposals meeting the criteria as outlined in page 2 of the documents shall be mailed to:

The City of Key West  
Office of the City Clerk  
1300 White Street  
Key West, Florida 33040



### 3. PRICING

Based on our understanding of the project and previous experience, MGT proposes to complete the City's strategic plan for a total cost of \$145,370, which includes all professional fees, travel expenses, and miscellaneous expenses. **Exhibit 6** provides the cost of services per task presented in the work plan.

*Exhibit 6. Cost of Services*

	WORK TASKS	HOURS	COST PER TASK
1	Conduct Project Initiation	44	\$ 8,490
2	Conduct Environmental Scan/SWOT Analysis	226	\$ 41,010
3	Community Visioning	156	\$ 29,830
4	Develop Mission, Vision, Values	66	\$ 12,590
5	Prepare Strategic Priorities Summary	44	\$ 8,300
6	Prepare Draft Strategic Plan	90	\$ 17,150
7	Prepare Final Strategic Plan	40	\$ 7,840
8	Develop Implementation/Monitoring Framework	50	\$ 10,320
9	Develop Template for Action Plan(s)	50	\$ 9,840
	<b>TOTAL</b>	<b>766</b>	<b>\$ 145,370</b>



## 4. ADDENDUM ACKNOWLEDGMENT

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MGT is in receipt of two addenda.