



April 25, 2020

Cheri Smith
City Clerk
City of Key West
1300 White Street
Key West, Florida 33040

Response to Request for Proposal No. 005-20: Strategic Planning Services

Dear Ms. Smith,

SBrand Consulting is pleased to present our qualifications to be the strategic planning partner for the City of Key West. SBrand is uniquely qualified for this project based on our experience, background, expertise and passion. We are professional facilitators specializing in strategic planning, organizational assessments and facilitated meetings with a deliberate focus on local government. The team associated with this project has vast experience working in with a wide variety of governments, including diverse communities across the country. We use a proven methodology that is customized to you, and our approach as your strategic partner results in collaborative and creative solutions to addressing your needs.

During this unusual time of the ongoing public health concerns, we also wanted to highlight our expertise in virtual facilitation – we have facilitated virtual meetings from small team groups to large community meetings with over 100 participants. If that might be an option for you moving forward, we have suggested that in our pricing proposal as an option.

We were present at the mandatory pre-proposal conference and understand that the City of Key West is seeking a consultant to guide in the development of a long range comprehensive strategic plan. Some specific tasks SBrand will complete are to

- ✓ Create a robust engagement process for your stakeholders and community;
- ✓ Facilitate the creation of a Vision, Mission, Core Values, Priorities, Goals, Objectives/Projects, Strategies, Performance Measures, and an Implementation Plan that inspire and facilitates action; and
- ✓ Build internal capacity with a process for ongoing engagement and implementation of the Plan.



Our work both as employees of government (cities and counties in California, Washington, and Colorado) as well as our extensive experience serving as strategic planning consultants to multiple governments sets us apart and gives us a deep understanding of the opportunities and challenges faced by the coalition.

I will personally lead and oversee the process: with over 28 years of strategic planning management for local governments (as both an employee and a consultant), I have a unique skill set that will guide your team to great results. As one of fewer than forty Certified Master Facilitators™ in the world, my team and I will utilize our expert skills in stakeholder engagement and facilitation as a tool to explore ideas with your community that will drive the Vision for Key West. The team members that will work with me will be Zach Ratkai and Logan Steppan. Zach is a government collaborator and champion of the public sector with over 15 years of experience working in and with municipalities throughout Colorado and Washington. Logan is a professional facilitator specializing in civic engagement processes.

This proposal is valid for one-hundred and twenty (120) days from the date of our submittal. If you need more information, we would be happy to meet with the Selection Committee at your convenience. Thank you for your consideration of our proposal. I look forward to hearing from you - we are very excited about the prospect of working with you and your team!

Sincerely,

Sheryl Trent, Owner
Certified Master Facilitator™
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Executive Summary

We have a unique perspective on creating your Strategic Plan, and an innovative (and proven) method of robust community engagement. Coupled with our expertise in facilitating local government strategic plans, we are the team to partner with the City of Key West. Our plans are not created in our offices based on our expertise – they are created in a collaborative partnership with the District and your community, partners, and stakeholders. This is a community and stakeholder informed plan, which you can see based on the number of community meetings recommended.

In short, here is our methodology: **through a facilitated process we engage with stakeholders that have diverse backgrounds, unique perspectives, cultural differences and divergent views of the future to create alignment using shared values and consensus on the vision for the future.** That input drives the development of an actionable, realistic strategic plan that has measurable outcomes.





We have strategic planning experience in a wide range of communities (socio economically, racially, politically, and culturally) and with Sheryl's background in public service and training as a Certified Master Facilitator™, SBrand has proven abilities to build collaboration, consensus, common ground, cooperation, and communication in groups.

Our recommended methodology includes four main phases:

1. Design a customized process built on consensus with stakeholders and the community resulting in an inclusive comprehensive Strategic Plan;
2. Conduct a situational analysis of the City organization with SWOT assessments;
3. Engage the community: gather information through surveys, facilitated meetings and workshops, and innovative engagement tools working with the community, boards, staff, partner agencies, leaders in the community and City Commissioners; and
4. Create sustainable actionable and realistic long-term results through a written plan and implementation documents (including a process for ongoing engagement).

We will also present specific recommendations for policies, procedures, and guidelines to adopt for the implementation of the Plan. We will use existing touchstones – regulations, policies, budgets, decisions, feedback from key partners, leadership, and staff - as well as best practices to build a sustainable future moving forward. The Implementation Plan will have realistic action steps tied to measurable outcomes.

The facilitated meetings are the **heart** of the process and will be the foundation for the components of your strategic plan. Our proposal outlines a series of sixteen total meetings over the course of six months (and again, many of these meetings can be facilitated virtually with a combination of live "webinars", prerecorded information, and Power Points). The meetings are designed to build understanding, create support for the goals and priorities, and engage the stakeholders in the implementation of the final decisions.

Our community engagement process is a critical factor, and our goals would be to collaborate and empower the stakeholders, staff, and community members during the process to assist in guiding the strategic plan.

We will develop a community engagement process using customized questions, innovative approaches, and unique tools. This inclusive approach will reach out to a wide and diverse range of residents, business owners, community groups, visitors and students to help inform the results



A great strategic plan process also includes staff as part of the engagement process, as well as a well understood procedure for ongoing updates and implementation of the Plan. With our deliverables that include ongoing reports and documentation, an easy to understand Strategic Plan that can be communicated, an Implementation Plan that is based in reality and resources, and an assessment of the City; Key West will be well prepared to achieve the Vision!

The attached spreadsheet goes into more detail about the phases, tasks, timing and proposal cost. We understand budget constraints and have offered our best advice on an approach that has proven to be successful with other clients. However, we understand that you may need to “downsize” our proposal and would be pleased to talk with you about that approach, so feel free to ask!

We appreciate the opportunity to share more about our methodology and our team with you. Thank you for your time.

Understanding Key West

The City of Key West is a culturally diverse City with unique opportunities and challenges in the areas of economy, history, tourism, environment, recreation, infrastructure and housing. The work done in 2011 indicates that there are strong community held values that are shared with visitors and recent arrivals to the community. With a high demand for services and a place-based economy driven by destination tourism, there are competing factors for limited resources.

We see a few critical pieces of the process:

The **first piece** will be a robust community engagement process with unique and innovative approaches to getting input and feedback.

The **second piece** will be the creation of an actionable, realistic Implementation Plan that is informed by the bigger picture but created with the staff.

The **third piece** will be the commitment from the community and from the City to not only implement the plan but update and communicate the plan.

We know you are the experts at understanding Key West, and that collective knowledge and expertise will allow us (as the experts in facilitation and strategic planning) to partner and create exactly what you need. We look forward to the opportunity to explore your ideas further!

Scope of Work

Big Picture Overview



A strategic plan answers three foundational questions:

- Where are we now?
- Where are we going?
- How will we get there?

Throughout this process, our approach creates opportunities for input and engagement – and combined with the research and organizational assessment all these questions will be asked and answered to provide the best possible information for your plan

Start: Kickoff Meetings and Calls

The kickoff meeting with staff to cover logistics, and subsequent phone calls and emails will guide the overall project and show us where we need to make changes and adjustments in our process. The Kickoff Meeting will determine all the details about the schedule, process and deliverables. We will discuss the specifics of community



involvement, Commission member and staff engagement, dates, and other logistics as well as be able to take a tour of the relevant facilities and meet staff. We recommend a weekly check in video conference throughout the process. All phone calls and emails throughout the life of the project are also included in our proposal.

Phase One: Design a Customized Process

The process and framework we will design is unique to the City and are based on extensive conversations during the kickoff meeting and throughout the timeframe. All our work includes consistent communication, facilitated meetings that are based on consensus and teamwork, follow up documentation and report for clear messaging, a community/stakeholder engagement process, and a written plan that creates amazing outcomes – that plan includes an implementation plan for specific operational tactics. It is important for you to know that any process is only as functional and effective as the information gathered.

We believe there are three key inputs to our methodology: the people, the preparation, and the product.

People

Our preference is to incorporate as many people into the process as possible, through the approach of multiple facilitated meetings, focus groups, in person interviews of key stakeholders, phone interviews, and short surveys among other methods. The City Commissioners, volunteer boards, advisory commissions, key stakeholder representatives, and your over 524 full and part time staff will be integral to the success of the project, but there may be others whose input would be helpful to include.

We recommend forming a small team (we call this an Advisory Group) to help guide the process and give feedback to us throughout the life of the project. The Advisory Group is usually comprised of 7 – 9 key stakeholders or community leaders





and is one more way to partner and have collaborative outcomes. The Advisory Group can (if appropriate) have an ongoing role in support of the outcomes and be a regular part of the updates to the strategic plan.

Preparation

Preparation for the conversations and the facilitated meetings are a second critical factor in the success of the process. (We often spend 5 hours researching, creating engaging exercises, and planning for every 1 hour in a meeting.) Using the feedback received during the kickoff meetings and conversations as well as the review and research of documentation, we will recommend questions to guide the personal interviews and surveys. This personalized approach results in specific questions tailored to you and your team, which helps get the best information with which your action plans can be formulated.

Facilitating meetings is both an art and science. As a Certified Master Facilitator™, Sheryl is a recognized expert in creating a facilitated meeting that accomplishes:

- 1) Full, comfortable, and enthusiastic input and engagement from all participants.
- 2) Relationship building, clear communication and shared understanding.
- 3) Support for the ideas and buy in for the implementation of the Plan.
- 4) The outcomes and products (relationships and deliverables) that your team wants and needs.

Product

We understand that the final product is a Strategic Plan for the next 5 years and essential timelines to assist with the implementation of the plan. With our help, YOU will create a Strategic Plan and implementation process that DOES NOT sit on a shelf.

You can view some examples of the plans we create on our website www.sbrandsolutions.com. There you will see that they all reflect the unique culture of each client; are clear, understandable, and easy to read; and used as a communication tool, not just a detailed document. We also understand and have experienced firsthand that the engagement process can create many other "products". Our methodology is designed to produce outcomes that result in:

- ✓ Trust
- ✓ Understanding of the needs and long-term challenges
- ✓ Buy in and support of the Vision for the future
- ✓ Champions for the implementation moving forward



The people and the facilitation process build the foundation that will lead to the **successful outcome**: long-term sustainability for your organization.

Phase Two: Gather Information to Conduct a Situational Analysis and Assessment

The organizational assessment process will create the internal foundation for the strategic plan. Based on policies, long range plans, documentation, demographics, community feedback and other practices, an assessment will determine

- Barriers and gaps for City services
- Current resources and future resource needs
- Current trends and topics
- Strengths, Weaknesses, Opportunities and Threats (SWOT)
- Boards and Commissions effectiveness and structure
- Inventory of internal resources (staff, budget)
- Inventory of community resources

Our assessment methodology will include a full review of all relevant documents; meetings with the Commission, staff and community to talk about SWOT; an analysis of current services, policies and procedures; research and review of demographics and other relevant community data; best practices and current trends; and conversations with a wide range of staff and community members for feedback. A specific Assessment Report will be created as a part of Phase Two and will be refined as a part of the overall Strategic Plan process.

If the City needed to reduce costs, this is the area in which we would recommend focusing those efforts. Much of the SWOT work is already being done in the interviews and facilitated meetings, and similar questions are asked of the community and staff during a normal strategic plan process.

Phase Three: The Engagement Strategy - Facilitate Meetings, Forums and Workshops; Gather Information with Creative Engagement Tools and Personal Interviews

This is where our background shines! As a Certified Master Facilitator™ we specialize in creating a meeting framework that is engaging, effective and creates the specific desired outcomes. Our team handles it all: preparing meeting agendas, designing Power Points, creating meaningful group discussions, and drafting meeting minutes, reports and recommendations.



Our work will include the following:

- Facilitated community meetings
- Personal meetings and interviews
- Short online surveys
- Phone calls and emails
- Facilitated staff meetings
- Facilitated Advisory Group meetings
- Online engagement (website and social media)
- Creative engagement tools: pop up white boards, sticky notes , postcards, local events

Engagement Strategy

We use five key components in our engagement strategy for your Strategic Plan. They include a [survey process](#), [in person interviews](#), [engagement materials](#), [facilitated meetings](#), and [reports](#).

1. Survey Process

The survey process can be used across a variety of platforms. We engage with the staff and the community using online survey tools, social media such as Facebook surveys, the website, and a printed postcard survey in a range of languages that meet your needs. We recommend using a link to the survey on your website, and we print flyers to leave, mail, send home at school locations and put online to create interest in the survey.

2. In Person Interviews

In person interviews – we have recommended twenty – are a significant part of the engagement process. Selecting important partners, key community leaders, outspoken individuals, and others to participate in a confidential survey process can give insight and feedback that is useful and informative. In addition, it can help inform people and create support for the strategic plan.

3. Engagement Materials

Even without a public health crisis, it is difficult to get our citizens to attend meetings! And please note that we are experts at virtual meeting facilitation – and often those meetings can be much more effective and efficient than in person meetings!

Our unique and innovative approach to engagement includes “pop up” white boards located throughout the community and at specific events, post it notes, survey postcards, flyers, social media language, website suggestions, online engagement tools such as Konveio.com and others – we find each community is unique and knows what



works best. We have included a sheet attached to this proposal with some visuals of our past engagement tools.

Note: one of the community meetings has a graphic recorder suggested as part of the process. This live sketch (which can also be done virtually if needed) is an amazing tool to engage with the community, have a visual tool to share during the process, and allow people to see their words become their Vision right in front of them! We have attached some visuals from our past meetings to show that technique.

4. Facilitated Meetings

The attached spreadsheet shows the timing of these meetings, all of which are woven into the methodology of assessing your current status, determining the vision for the future, and creating the specific action steps that will accomplish that vision. To save costs and time, SBrand recommends that we group our meetings to occur on subsequent days.

Community Meetings

Community Visioning Session *recommended with a graphic facilitator* (2 hours)

Community Priorities and Goals meeting (2 hours)

Community Review of the Draft Documents (2 hours)

Advisory Group Meetings

Advisory Group Kickoff and SWOT Meeting (2 hours)

Advisory Group Priority and Goal Setting Meeting (4 hours)

Advisory Group Objectives and Outcomes Meeting (4 hours)

Advisory Group Final Draft Review Meeting (2 hours)

Commissioner Meetings

Commissioner Needs Assessment and Analysis (SWOT) Session (2 hours)

Commissioner Consideration of the Final Plan (1 hour)

Staff Meetings

Staff Vision, Mission and Core Values Session (4 hours)

Staff SWOT Meeting (4 hours)

Staff Implementation Plan Meetings (4 hours each, anticipate 2 meetings)

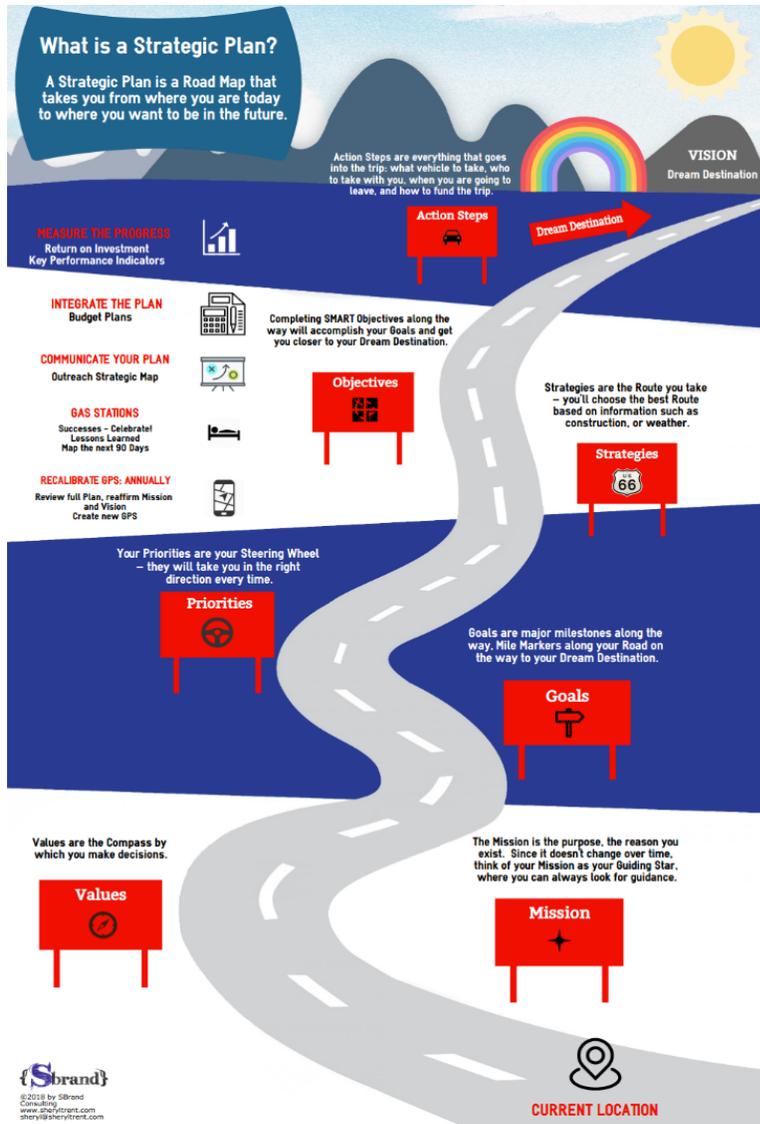
Our administrative staff will work with you on all the details behind this process: scheduling in-person meetings or calls, determining location and confirming time and date of meetings, sending reminder emails, and creating documentation.

5. Reports and Information

The reports, photos and document during the process are an often-overlooked part of the transparency we use in creating your Plan. The reports can be posted online,

emailed out, or given to the Commission and staff for updates. The community members who could not attend a meeting can stay up to date on the plan and the process.

Phase Four: Create a Strategic Plan with Implementation Strategies for Long Term Sustainability



This is your Road Map, your guide to the future of your organization. Our Strategic Plans and Implementation Plans are customized to our clients (see the website for examples) but there are components to any Strategic Plan that are critical to long term success. While the language is often slightly different for each plan, it is important to have a clearly outlined and understandable:

- ✓ Vision
- ✓ Mission
- ✓ Core Values
- ✓ Priorities
- ✓ Goals, Projects/Objectives and Strategies (GPS)
- ✓ SWOT (Strengths, Weaknesses, Opportunities and Threats)
- ✓ Specific Action Steps in an Implementation Plan that are realistic and achievable
- ✓ Measurables for the Intended Outcomes

You can view several examples of the strategic plans that we create with our clients on our webpage at www.sbrandsolutions.com.

The Implementation Plan will be the actionable, realistic, “rubber meeting the road” part of the process. While the community and the Advisory Group are instrumental in guiding the bigger picture, the staff (the people responsible for doing most of the work to accomplish the Goals and Objectives) must be involved. We have found the most effective way to create a realistic, integrated Implementation Plan is to have three components:

- 1) Have the staff involved in all stages of the process. They are invited to attend all the meetings.
- 2) Have regular update meetings/conversations/phone calls/emails with staff.
- 3) Have specific meetings to create the details behind the Implementation Plan. This involves not only the actual meetings (2 are proposed) but also some pre-work for understanding, communication, and commitment.

Most of our clients take the results of the Implementation Plan and use an online tracking tool (Monday.com is one that we recommend for ease of use and low cost) as well as hold regular quarterly update meetings.

Final Step: Present Specific Recommendations for Implementation Measures

Strategic Planning Process

Our unique process involves 5 steps customized to each client

1	<p>Perspective and Trends We cover the history and background of economic development, including Mission, Vision, and Values. An in-depth discussion about turning point and agreement on definitions lays the foundation for forward momentum and success.</p>
2	<p>Brainstorming and Focus The 4 Critical Questions and 3 Vision Questions cover “Where are we now?” and “Where are we going?” so that the stakeholders can create a Long List of Opportunities and Challenges.</p>
3	<p>GPS (Goals, Projects and Strategies) This is the heart of the Plan. From the Long List we establish Core Priorities and our future direction. Goals: (The <u>Why</u>), Projects: (The <u>What</u>) and Strategies: (The <u>How</u>). SWOT and SMART are both applied during this step.</p>
4	<p>Measurable Actions No amount of planning is valuable without actions. We recommend 90 Day Actions that are led by goals, guided by strategy, and that accomplish projects. Focus and Accountability are driven by a Leader and Team for the action, a Completion Date, and a Measurement/Evaluation.</p>
5	<p>Celebrate, Evaluate and Report Finally, Celebrate Success! This step encourages a thoughtful and thorough review of the Action Plan every 90 days. The group reviews Lessons Learned, identifies Trends or New Issues, determines Next Steps, and Reports Out on accomplishments.</p>

As a best practice, we recommend that you adopt an ongoing process for reviewing and updating the action steps included in the plan.

We have included an approach in our proposal that includes quarterly meetings to celebrate successes, talk about lessons learned, set Action Steps for the next quarter, and annually review the GPS.

As a part of this approach, we have developed a series of templates, videos, workbooks and tools that will create capacity within your internal team to continue to build on strategic success and have a sustainable approach to implementation.



Deliverables

- Organizational Assessment
- Comprehensive Strategic Plan
- Actionable Implementation Plan
- Strategic Plan Summary (we call this a Plan on a Page)
- Package of materials suitable for public outreach regarding
 - The creation of the plan
 - Engagement materials for the Plan
 - The final Plan and information
- Recommendations for implementation measures to administer the plan including a process for engagement and communication
- Reports and documentation from all facilitated meetings, surveys and assessments
- All Power Point presentations and photos from meetings
- Original files for all work

Why SBrand Consulting?

Formed in 2011 by Sheryl Trent, SBrand Consulting has a unique expertise in working with local government clients to solve problems and “fill in the blanks”. As a professional facilitation firm, we partner with your team through solutions and implementation.

SBrand is the right team to work collaboratively with stakeholders, commission members, and staff because we know how to ask the right questions, framed in the right way, with the right people in the room (the R3 principle) and to use that feedback to create a strategy for the future of the organization which reflects the input. We always use a framework that not just encourages but requires diversity, equity and inclusivity to get the best result. “None of us is as smart as all of us” and that lens is applied to all facets of our process.

Prior Experience

Both Sheryl and Zach have specific employment and contracting experience in city government with expertise in community development, economic development, finance and budget management, long range planning and strategic planning. Logan has unique experience with civic engagement in large communities. (See resumes attached). We also have experience working in the State of Florida and are very familiar with all the regulations concerning public input and meeting laws.



We have attached the required references as well as a list of representative projects and wanted to create a short list for your review. As you can see, we limit the number of our clients so that we can provide the customized personal services! Our longer list of clients in the past three years have included:

- States, Cities and Counties
- Quasi-Governmental Organizations and Special Districts
- Public Works, Human Services, Housing and Human Resources Departments
- Economic Development Organizations and Main Streets

Client	Project	Completion Year
Town of Windsor, Colorado	Strategic Plan, Implementation Plan, Team Building	2018 and ongoing
City of Coconut Creek, Florida	Strategic Plan, Implementation Plan, Community Engagement	Current
Lee County, North Carolina	Strategic Plan, Implementation Plan, Community Engagement	Current
Napa County, California	Strategic Plan, Implementation Plan	2019
City of Steamboat Springs, Colorado	Community Engagement	2019

Summary

Thank you for your consideration of our services! We appreciate the time it takes to have a process to select the right consultant as your partner, and we are happy to provide any information or resources that might be helpful to you. With our real-life experience working for (as employees and consultants) and with (as advisors, consultants and partners) local government agencies, we are confident that we can partner with you to create a process that engages your unique community and creates the comprehensive approach needed for your Strategic Plan.



Required Forms and Affidavits (Attached)

Qualification Statement
Anti-Kickback Affidavit
Non-Collusion Affidavit
Sworn Statement on Public Entity Crimes
Indemnification
Equal Benefits for Domestic Partners Affidavit
Cone of Silence Affidavit

Pricing

Please see the attached spreadsheet for details.

Addendum Acknowledgement

We acknowledge the receipt and understanding of the following Addendums:

Addendum No. 1
Addendum No. 2

Appendices

Required Notarized and Signed Forms
Sheryl Trent Resume
Sheryl Trent Biography
N. Zach Ratkai Resume
Logan Steppan Resume
Representative Projects
Community Engagement Examples

Key West Comprehensive Strategic Plan

Timelines, Phases and Deliverables



Phases and Tasks <i>Includes weekly video/phone conference call and all meeting materials.</i>	Deliverable	Proposed Dates <i>To be determined by Client</i>	Proposed Cost	Recommended Options
Phase One: Design community engagement process		May - June, 2020		
Kickoff Meeting with staff	Logistics meeting to review framework, process, milestones and deliverables	Week of May 18, 2020	\$ 1,500.00	
Recommended partners for the Advisory Group	A list of organization and contacts for invite	By May 20, 2020	\$ -	
Recommended list of interviewees	Names of partners and stakeholders to interview	By May 20, 2020	\$ -	
Create talking points for community engagement	Key points about the process to inform and excite	By May 25, 2020	\$ 1,000.00	
Create draft interview questions and draft survey questions for approval	Community and staff questions	By May 25, 2020	\$ 1,000.00	
Community Engagement Strategy	Final engagement strategy for approval	By June 11, 2020	Included	
Weekly video/conference call and written updates for community, staff and commission			Included	
Phase One Deliverable		Approved engagement process, identification of stakeholders, and marketing materials	\$ 3,500.00	
Phase Two: Conduct an organizational assessment and SWOT		June - July, 2020	<i>Note: this may be an area to conserve resources and re evaluate after the strategic plan process is complete</i>	
Conduct review of documents, plans, policies and procedures	All materials necessary	Months of May and June		
Inventory of current City resources	Including staff, finances and infrastructure	Months of May and June		
Analyze trends and demographics	Independent research and analysis	Months of May and June		
Review current board, committee, commission and group roles and responsibilities	To determine efficiencies	Months of May and June		
Facilitate community, staff and advisory group SWOT discussions	Facilitated meetings (3) listed below	May, 2020	Included below	
<i>Commissioner Meeting to Discuss Findings and Report</i>	In a meeting for review and feedback	Meeting of June 23, 2020	Included	
Final Report	Report for Commissioners	By July 1, 2020	Included	
Proposed Cost for Assessment and Analysis	Anticipate 125 hours of work		\$ 6,250.00	
Phase Two Deliverable		Organizational Assessment	\$ 6,250.00	
Phase Three: Facilitate the engagement process		June - August, 2020		
Create final interview questions for approval	Draft questions for key stakeholders	By June 1, 2020	\$ 500.00	
Create final online survey for approval	Draft community survey	By June 1, 2020	\$ 500.00	
Personal interviews - on site and by Zoom/phone	Up to 20 in person/phone interviews of key stakeholders	Week of June 22, 2020	\$ 4,000.00	
Online community survey	Release and monitor survey	June 15 - August 1, 2020	\$ 1,000.00	
Recommend: Postcard survey - graphic design and printing of 2,500 postcards	Designed to be mailed but also handed out	By June 22, 2020		\$ 2,500.00

Recommend: Informational flyers - graphic design and printing of 10,000 postcards	Designed to be mailed but also handed out	By June 22, 2020	\$	2,500.00
Recommend: Sticky Notes and White Boards - 1,000 sticky notes designed and printed, 3 white boards and 6 easels for City use	Plan for placement and outreach	By June 22, 2020	\$	1,000.00
Recommend: social media posting and engagement	2x weekly posting during project	May - September, 2020	\$	3,000.00
Implement community outreach at events, with white board, using sticky notes, in school	Note: City staff will take the lead on this Phase, if travel arrangements work for SBrand to assist while on site we will be happy to help!	June - August, 2020	\$	-
Full reports of all engagement data: interviews, surveys, postcards, sticky notes, boards		By August 15, 2020	\$	2,500.00

FACILITATED MEETINGS

Advisory Group Kickoff and SWOT	SWOT from the community perspective	Wednesday, May 20, 2020	\$	2,500.00	
Commissioner Needs Assessment, Analysis, SWOT in a 1/2 day work session	SWOT from the Commissioners perspective	Tuesday, May 19, 2020	\$	3,500.00	
Staff SWOT	SWOT from the staff perspective	Thursday, May 21, 2020	\$	1,500.00	
Community Visioning Session (recommended graphic recorder shown as additional cost)	Vision for the future from the community	Tuesday, June 23, 2020	\$	2,500.00	\$ 2,500.00
Staff Vision, Mission and Core Values	Review and review existing Mission, Vision and Values	Thursday, June 25, 2020	\$	2,500.00	
Community Priorities and Goals	Big picture priorities and goals from the community perspective	Tuesday, July 14, 2020	\$	2,500.00	
Advisory Group Priorities and Goals	Taking the larger community priorities and goals and refining them	Wednesday, July 15, 2020	\$	2,500.00	
Staff Update Meeting	15 - 30 minute update on progress	Thursday, July 16, 2020	Included		Included
Advisory Group Objectives, Initiatives and Outcomes	With the priorities and goals in place, creating the next level of specifics	Wednesday, August 5, 2020	\$	2,500.00	
Staff Update Meeting	15 - 30 minute update on progress	Thursday, August 6, 2020	Included		
Recommended: Advisory Group Review of the Draft Document	For comment and correction	Wednesday, August 26, 2020			\$ 1,500.00
Recommended: Community Review of the Draft Document	For information and feedback	Thursday, August 27, 3030			\$ 1,500.00
Staff Implementation and Action Plan	2 meetings, 4 hours each to create the Action Plan (with additional work done before the meetings)	Wednesday and Thursday. September 9 and 10, 2020	\$	5,000.00	
Commissioner Consideration of Final Plan	For final approval	Tuesday, September 15, 2020	\$	1,500.00	
Phase Three Deliverable	Community Engagement Process		\$	35,000.00	\$ 14,500.00
Phase Four: Create a Strategic Plan	<i>Includes 2 revisions to the document and all original graphic files</i>	September, 2020			
First Draft of Strategic Plan	For Advisory Group Review	By August 17, 2020	\$	1,500.00	
Second Draft of Strategic Plan	For email and online comment	By August 31, 2020	\$	750.00	
Final Plan for Review	In time for agenda	By September 4, 2020	\$	500.00	
Phase Four Deliverable	Final Strategic Plan with Implementation Documents		\$	2,750.00	\$ -
Estimated overhead (materials and travel) - not to exceed			\$	12,000.00	

Total Not to Exceed Cost *Note: some facilitated meetings may require more than one facilitator due to size or complexity. Those costs are built into this proposal.*

\$ 59,500.00 \$ 14,500.00

Additional Recommendations			
Ongoing Support and Implementation		January, 2021 - September, 2021	
Monthly conference calls, customized templates	Monthly video conference, written templates, responses to emails and phone calls		Included
Quarterly Review and Update Meeting - includes overhead	On site	January, 2021	\$ 3,500.00
Quarterly Review and Update Meeting - includes overhead	On site	April, 2021	\$ 3,500.00
Quarterly Review and Update Meeting - includes overhead	On site	May, 2021	\$ 3,500.00
Quarterly Review and Update Meeting - includes overhead	On site	September. 2021	\$ 3,500.00
Report and Recommendations - includes overhead	In a work session for consideration	September. 2021	\$ 1,500.00
	Deliverable	Full Year of Ongoing Support and Implementation Meetings	\$ 15,500.00

PART 2

FORMS AND AFFIDAVITS

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: SBrand Consulting, LLC
Company Name: _____ Corporation X

Company Website: www.sbrandsolutions.com Partnership _____

Principle's Name: Sheryl Trent Individual _____

Principle's Title: Owner Joint Vent _____

Address 1: 2874 Blue Leaf Drive Other _____

Address 2: Fort Collins, Colorado 80526

Contact Email: sheryl@sbrandsolutions.com

LICENSING:

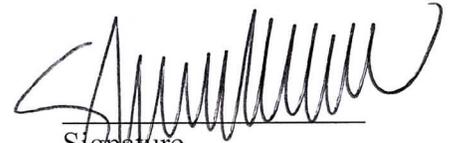
State of Florida License No. L20000045409 Expires N/A

Note: this is the LLC filing for SBrand Consulting LLC with the State of Florida.
We have been advised by the state that no other filing is required.

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

Reference List			
Reference	Contact Name	Phone	Email
City of Coconut Creek, FL	Bernadette Hughes	954.973.6770	bhughes@coconutcreek.net
Custer County, Colorado	Jay Prinz, Commissioner	719.431.9979	jay@custercountygov.com
Town of Windsor, Colorado	Shane Hale, Town Manager	970.674.2400	shale@windsorgov.com
State of Colorado, DOLA	Gayle Langley, Manager	303.864.7728	gayle.langley@state.co.us
City of Steamboat Springs, Colorado	Lisa Popovich, Manager	970.367.7060	lisa@mainstreetsteamboat.c
Clearview Library District	Brian Lampe, Board	970.371.4481	blampe@centleasing.com

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

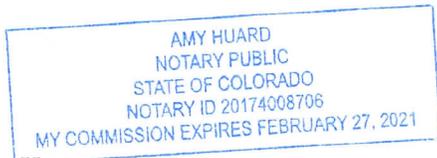

Signature

State of ~~Florida~~ COLORADO
County of LARIMER

Sworn to (or affirmed) and subscribed before me this 19 day of MARCH, 2020

By SHERYL TRENT

(Seal)




Signature of Notary

Personally Known _____

Produced Identification X CO

Type Produced COLORADO DRIVER LICENSE

AMY HUARD
Print

**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.

RFP#005-20

1. This sworn statement is submitted with Bid, Bid or Contract No. _____ for
Strategic Planning Services

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

whose business address is 2874 Blue Leaf Drive, Fort Collins, Co 80526

_____ and (if applicable) its Federal
Employer Identification Number (FEIN) is 81-4426786 (If the entity has no FEIN,
include the Social Security Number of the individual signing this sworn statement.)

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

Owner
the entity named above is _____.

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.)

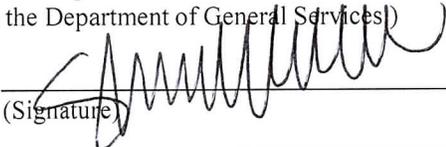
X Neither the entity submitting this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, nor any affiliate of the entity have been charged with and convicted of a public entity crime subsequent to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

STATE OF COLORADO (Date)

COUNTY OF LARIMER

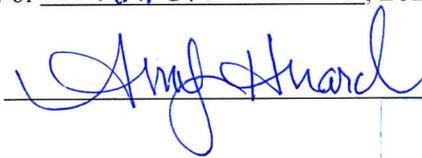
SHERYL TRENT
PERSONALLY, APPEARED BEFORE ME, the undersigned authority,

SHERYL TRENT
(Name of individual signing)

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

space provided above on this 19 day of MARCH, 2020.

My commission expires: 02/27/21
NOTARY PUBLIC



AMY HUARD
NOTARY PUBLIC
STATE OF COLORADO
NOTARY ID 20174008706
MY COMMISSION EXPIRES FEBRUARY 27, 2021

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.

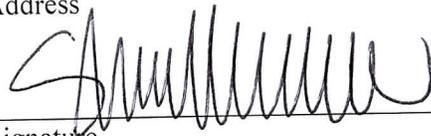
The indemnification obligations under the Contract shall not be restricted in any way by any limitation on the amount or type of damages, compensation, or benefits payable by or for the CONSULTANT under workers' compensation acts, disability benefits acts, or other employee benefits acts, and shall extend 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.

: _____

SEAL:

2874 Blue Leaf Drive, Fort Collins, Co 80526

Address



Signature

Sheryl Trent

Print Name

Owner

Title

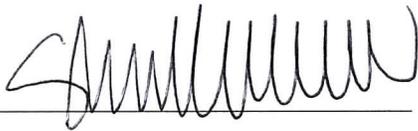
3/19/20

Date

EQUAL BENEFITS FOR DOMESTIC PARTNERS AFFIDAVIT

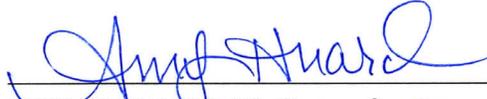
STATE OF COLORADO)
 : SS
COUNTY OF LARIMER)

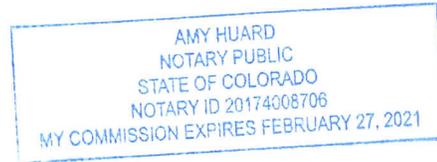
I, the undersigned hereby duly sworn, depose and say that the firm of SBrand Consulting, LLC provides benefits to domestic partners of its employees on the same basis as it provides benefits to employees' spouses per City of Key West Ordinance Sec. 2-799.

By: 

Sworn and subscribed before me this

19 day of MARCH, 2020.


NOTARY PUBLIC, State of COLORADO at Large



My Commission Expires: 02/27/21

Education

- BA Political Science, University of Washington
- MPA Public Administration, University of Washington
- Rocky Mountain Leadership Program
- Certified Master Facilitator (tenured)
- Certified Life Coach
- Lifelong learning

Professional Affiliations

PAST AND PRESENT

- ICMA Member, Credentialed Manager
- CCCMA Member, Conference Planning
- ICSC Member, Government Relations
- IEDCC Member
- INIFAC Board Member
- Chamber of Commerce Board Member
- Small Business Development Center Board Member
- Leadership Councils
- Rotary President
- Adjunct Faculty, Front Range Community College

Clients

- Across the country
- State Agencies
- Cities and Towns
- Counties
- Special Districts
- Non profit Associations
- Chambers
- Economic Development Organizations
- Banks
- Architectural Firms
- Museums



Sheryl Trent

With over 28 years of local government (cities and counties) experience, Sheryl Trent is one of fewer than 45 Certified Master Facilitators in the world. Her real life experience which includes managing strategic plans, comprehensive plans, massive capital projects, economic development agencies, Urban Renewal Authorities; as well as her non profit board experience gives her a unique understanding of the needs of her clients. She designed SBrand Consulting to "help fill in the blanks" for her clients: local governments, special districts, nonprofits and other agencies. She and her team of experts travel across the country designing a customized process grounded in proven methodologies to create strategic, sustainable success.

Client Results

- **Consensus Driven Facilitation**
- **Results Based Strategic Planning**
- **Board and Team Development**
- **Community/Stakeholder Engagement**

GILPIN COUNTY, COLORADO

Facilitated a multi-disciplinary (Board, stakeholders, staff and elected officials) Strategic Plan for Gilpin County, resulting in a clear Mission, Goals, Areas of Focus and Objectives moving into the next 5 years.

CLEARVIEW LIBRARY DISTRICT, COLORADO

Designed and facilitated a unique community engagement process for the District over the course of 8 months. Resulted in an updated Strategic Plan and engaged public.

EAGLE COUNTY, COLORADO

Led a retreat with the Board of County Commissioners and staff that completely updated the Strategic Plan, resulting in buy in from elected and appointed officials and key staff members. Resulted in a streamlined, easy to use and implement Plan.

TOWN OF WINDSOR, COLORADO

Created and facilitated a staff team building retreat, a Town Board team building retreat, and a strategic planning retreat to create a 5 year Strategic Plan for the future of Windsor.

CUSTER COUNTY, COLORADO

Over the course of two years, facilitated community engagement meetings designed to create alignment, common understanding and Vision, and teamwork among governmental, nonprofit and community agencies responsible for economic development in the County. Resulted in support for a long range Vision, Goals, Priorities and Actions that have community support.

COLORADO MAIN STREET

Developed and facilitated (for over 30 communities) board development/training, board retreats, and strategic planning that resulted in the creation of work plans, teamwork, and grant funding.

Strategic. Sustainable. Success.

{SBrand}

HELPING YOU FILL IN THE BLANKS

Sheryl Trent

(970) 208-6633
sheryl@sbrandsolutions.com
2874 Blue Leaf Drive, Fort Collins, Colorado 80526
www.sbrandsolutions.com

summary of qualifications

- 25+ years of experience in public and non profit sector leadership and management
- A Certified Master Facilitator™, one of fewer than 40 in the world
- Expert at facilitating complex and confrontational topics in a manner that makes them easy to understand and allows consensus to be built
- Customized process and product for each client that builds capacity and enhances shared values
- Proven success and long term results in facilitating strategic planning & team building for clients
- Unique community engagement design and tools
- Experienced virtual facilitator for large and small meetings

professional management and leadership experience

current

OWNER, SBRAND CONSULTING, LLC



prior

**COMMUNITY AND ECONOMIC
DEVELOPMENT DIRECTOR**
City of Evans, Colorado

EXECUTIVE DIRECTOR
Evans Redevelopment Agency

TOWN ADMINISTRATOR
Town of Milliken, Colorado

**COMMUNITY DEVELOPMENT DIRECTOR
(ACTING)/ ECONOMIC DEVELOPMENT
MANAGER**
City of Grand Junction, Colorado

INVESTMENT REPRESENTATIVE
Edward Jones Investments, Yreka, California

**COUNTY ADMINISTRATOR
(ACTING)/ASSISTANT COUNTY ADMINISTRATOR**
County of Siskiyou, Yreka, California

ASSISTANT TO THE CITY ADMINISTRATOR
City of Santa Paula, Santa Paula, California

ASSISTANT TO THE CITY MANAGER/INTERN
City of Federal Way, Federal Way, Washington

past and present

education

- BA Political Science, University of Washington
- MPA Public Administration, University of Washington
- Certified Master Facilitator™
- Rocky Mountain Leadership Program
- Grand Junction Area Chamber of Commerce Leadership Program
- Credentialed Manager with ICMA
- Certified Life Coach
- Consistent ongoing training and coursework

professional affiliations

- ICMA Member, Credentialed Manager
- CCCMA Member
- INIFAC Board Member
- ICSC Member, Government Relations
- IEDCC Member
- Downtown Colorado Member
- Association for Strategic Planning Member
- Small Business Development Center Board Member
- Leadership Council, Upstate Colorado
- Adjunct Faculty, Front Range Community College



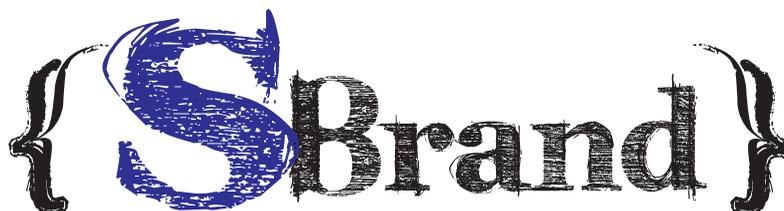
Sheryl Trent

(970) 208-6633
sheryl@sbrandsolutions.com
2874 Blue Leaf Drive, Fort Collins, Colorado 80526
www.sbrandsolutions.com

highlights

- Facilitates the creation of customized strategic plans for public and non profit clients that build capacity, inspire action, ensure accountability, and focus on results.
- Creates fun and engaging team building retreats that increase communication and results in forward momentum and alignment.
- Cultivates curiosity that drives learning and listening through shared values.
- Designs specialized training (in person, manuals and videos) for facilitation skills, strategic planning, Board development and team building.
- Negotiates and administers contracts and agreements with public and private partners that have resulted in multi million dollar capital projects, grants for both capital and planning projects, and agreements for development and sharing of new revenue.
- Leads multi-functional teams to develop new strategies, adopt controversial plans with support and consensus, create new investments and capital projects, and involve a wide range of affected parties.
- Establishes working groups of stakeholders that successfully collaborate to drive implementation, forward momentum and accountability.
- Speaks at keynote engagements on how to effectively facilitate meetings and implement strategic plans.
- Offers sought after on line training for strategic planning and board development at www.sbrand.teachable.com.

Learn more at www.sbrandsolutions.com



HELPING YOU FILL IN THE BLANKS

Strategic. Sustainable. Success.

N. Zach Ratkai

1876 Nova Ln. Richland, WA | 303.594.9569 | NZRatkai32@gmail.com

Leadership | Innovation | Authenticity | Accountability

Diverse and experienced leader in local government with a consistent record of exceptional team development, process innovation, authenticity and credibility. Management style is leading with an emphasis on empowerment of employees, community engagement, and transparency. Leadership philosophy based on accountability, transparency and credibility. Experience includes facilitation and strategic planning, economic development, land use planning, project management, public sector financial planning and budget management, liaison to state and Federal elected officials, emergency response and disaster management, parks and facilities, clerk and public records, administration of indigent defense programs, and information technology.

CORE COMPETENCIES & AREAS OF EXPERTISE

Economic Development	Capital Facilities Planning	Leadership & Team Building
Land Use Management	Strategic Planning	Disaster Response & Recovery
Policy Development & Implementation	Process Improvements	Political Lobbying
Budget Management	Public Communication	Business Development
	Community Engagement	

PROFESSIONAL EXPERIENCE

CITY OF PASCO, WASHINGTON

September 2018 to Current

Administrative and Community Services Director

Directs the activities of the Administrative and Community Services Department. Responsible for the development, recommendation, and implementation of policies, programs, and procedures that accomplish the goals and objectives of the department which includes the following divisions: Information Technology, Facilities, Recreation, Municipal Court (Indigent defense), and the City Clerk in addition to assigned special projects consisting of real estate asset sales and purchasing, facilitation of future bond initiative election for the development of a regional aquatic center, as well as the re-development of the region-wide animal shelter. Responsible for an \$8.4 million general fund budget, a capital improvement budget totalling \$17.6 million for 2020. Reporting directly to the City Manager and providing a political interface between overall community policies and the staff of the department. Responsible for facilitating inter-departmental relationships to implement projects, policies, and procedures for a diverse group of staff and stakeholders united to a single mission. Providing leadership, development, and resources to ensure the overall functions are delivered to the Pasco community in a timely, comprehensive, complete, and fiscally sound manner.

CITY OF RICHLAND, WASHINGTON

February 2016 to September 2018

Economic Development Manager (June 2016 to Present)

Redevelopment Project Manager (February 2016 to June 2016)

Managed key economic development projects and programs in concert with City Council's strategic plan and policies. Including local business outreach and national business recruitment. Managed marketing, recruitment, sales, and development of over 2,100 acres industrial/commercial land owned by the City of Richland, WA. Created and facilitated plans and strategies for business retention and attraction with a key focus on primary-sector job creation, retail growth, small business, and start up programs. Responsible for Richland's Industrial Development Fund (\$12,900,000 budget). Managed staff of two (2) personnel, integrating economic development priorities with development review, public works, and

administrative staff in Richland to ensure mutual community benefit. Media liaison for city projects and programs to forward promotion of business and economic growth. Responsible for identifying, developing, implementing, managing and completing projects to redevelop and revitalize Downtown Richland and the Richland waterfront. Liaison to the Uptown and Parkway Business Improvement Districts, assisting with their needs from the City and providing a voice on their behalf. Project management including acquisition/disposal, planning, design, construction, and budget for development activities in Downtown Richland.

CITY OF EVANS, COLORADO

January 2012 – February 2016

Flood Recovery Manager – Appointed (March 2015 to February 2016)

Community Development Manager (Jan 2013 to February 2016)

Building and Neighborhood Services Manager (Jan 2012 to Jan 2013)

Responsible for the administration and management of all divisional related to the creation and implementation of the City's comprehensive plan, current planning, zoning administration, growth management, building code administration, general nuisance and zoning code administration and enforcement. Staff supervision (5 employees), oversight of consulting services, contract administration and budget administration. Oversaw update to 2012 building codes, modernization of zoning code, updates to general penalty code in conformance with Colorado state statute. Field work including, site and building inspection, meeting with contractors and consultants, fire and damage assessment. Regional liaison for various Federal, State and local agencies for the City. Responsible for supervising recovery operations from September 2013 floods, acquisition of reimbursements, acquisition of grants, reconstruction of Riverside Park (totaling nearly \$20 million), supervision of four grant funded recovery staff members. Oversaw the award of \$5 million in Federal grant money for Riverside Park reconstruction to the City. Served in regional inter-governmental outreach, assistance with the Governor's Disaster Resiliency Panel, legislative monitoring and public outreach. Built relationships with the Governor's office, state elected delegation, and Colorado federal delegation to forward both general legislative and flood recovery efforts.

TOWN OF SEVERANCE, COLORADO

January 2008 – December 2011

Town Planner

Management of town historical development information and GIS data. Initiated state-required comprehensive Plan update including a complete overhaul of town land use codes to a form based development regulation document. Assist Town Manager with parks irrigation, personnel matters and finance. Public Information Officer, in charge of emergency notification and community involvement. Town representative for the North Front Range MPO and Upstate Colorado Economic Development.

CITY OF LOVELAND, COLORADO

May 2004 – December 2007

City Planner I

Project management for current planning review. Coordination of development review team for subdivision review, residential PUD, special use review, annexation, rezoning, architectural/landscape review and field inspection. Project manager for development review software implementation (2007)

EDUCATION

Master of Arts in Public Administration (2014)

University of Colorado

Graduate Certificate in Public Management (2012)

University of Colorado

Bachelor of Arts in Applied Geography (2004)

University of Northern Colorado

PROFESSIONAL DEVELOPMENT

- IBC Certified Building Inspector (2012-2016)
- IRC Certified Residential Inspector (2012-2016)
- Certified Public Manager
- California OES Safety Assessment Inspector
- Incident Command System Certified, Levels 100, 200, 300, 400, and 800

AWARDS & RECOGNITION

- ELGL “Chris Traeger List of Top 100 Local Government Influencers!”, 2017 and 2018
- Washington Economic Development Association – Emerging Professional Award (Nominee/Finalist) 2017

PANELS & PARTICIPATION

Moderator

Emerging Tri Cities Local Government Candidate Forum 2017

Co-Presenter

Leadership Tri-Cities Economic Development Day 2017

ELGL Pop-Up Conferences (Portland) 2017

Colorado City/County Managers Association Winter Conference 2018

Speaking Engagements

Kadlec Regional Medical Center Tower Ribbon Cutting 2016

Tri Cities Economic Outlook 2018

PROFESSIONAL MEMBERSHIPS & ASSOCIATIONS

Tri-Cities Legislative Council (Regional Chamber Rep.)	2018 - Present
Engaging Local Government Leaders (ELGL), Member	2014 – Present
International Economic Development Council	2016 – Present
Association of Washington Cities	2016 – Present
Tri-Cities Economic Council	2016 – Present
American Planning Association	2004 – 2016
International City-County Management Association (ICMA), Member	2012 – 2016
Colorado City-County Managers’ Association (CCCMA), Member	2012 – 2016
Colorado Municipal League Policy Committee	2013 – 2016
Colorado Emerging Managers (CEM), Founding Member	2013 – 2016
Colorado Governor’s Panel on Disaster Recovery	2015 – 2016

RESUME—Logan Steppan



A master strategist and expert facilitator, Logan Steppan —founder and CEO of Creek Consulting— developed his skills while studying at Colorado State University in Fort Collins, CO. An Ozark born Missourian with entrepreneurial roots, Logan’s passion for facilitation has long been connected to government, community and policy conversations at state, local and national levels. Armed with a dual-degree in Political Science and Criminal Justice, Logan honed his craft while working with the Center for Public Deliberation and formally launched Creek Consulting in April of 2015.

Education

Dual Bachelor of Arts Degrees in Political Science and Criminology, 2014
Colorado State University
Fort Collins, CO

Professional Experience

Creek Consulting, LLC

CEO and Founder
2015—Present
Front Range, CO

Center of Public Deliberation

Facilitator and Project Coordinator
Aug 2012- May 2014
Colorado State University, Fort Collins, CO

Creek Consulting, LLC—Contact Us

 19955 E Williamette Ln.
Centennial, CO 80015

 (720) 384-7791

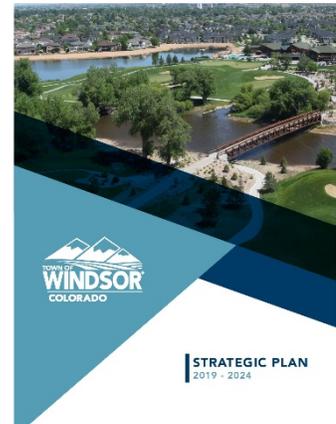
 www.creekconsultingllc.com



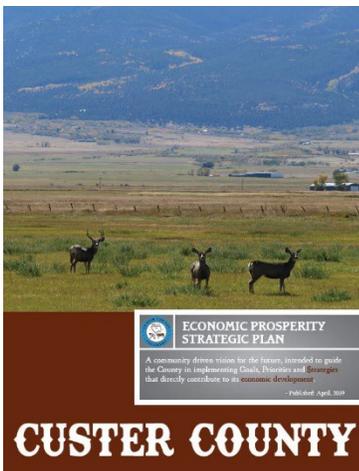
Representative Projects

Town of Windsor Strategic Plan (2018 – Present)

The Town of Windsor asked SBrand Consulting to hold a series of Board and staff retreats to build teamwork and communication and drive a new strategic plan for the future of Windsor. With a new Board and a new Manager, Sheryl conducted leadership and organizational assessments to build the base of the plan, which was then submitted for public comment. The plan was then expanded into several departments and dash boarded for a fully integrated implementation tool.



Custer County Economic Prosperity Strategic Plan (2019)

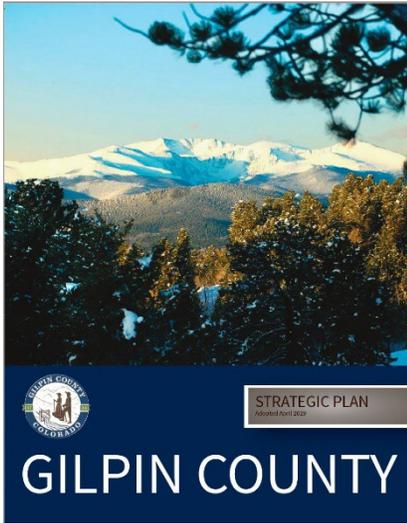


The Board of County Commissioners selected SBrand Consulting to conduct an intensive series of community meetings, grounded by a community survey and specific stakeholder interviews to drive the Strategic Plan. The focus of the Plan was on economic prosperity, and over the course of 5 public meetings, over 600 surveys, 30 individual interviews, and multiple Task Force meetings, Sheryl was able to create a consensus-based document in a community that has often been characterized by dissent and political differences.

Clearview Library District Strategic Plan (2019)

As part of their ongoing strategic planning efforts, the Library District contracted with SBrand Consulting to conduct an extensive community engagement process and update of their strategic plan. After two failed ballot measures and significant stakeholder feedback, the Board indicated a strong desire to have a community drive strategic plan. Over the course of six months over 3,000 comments were received from a variety of unique and innovative engagement strategies (such as post it notes, pop up white boards, and more). The community based Advisory Board met over eight times to offer insights and feedback into the final plan.



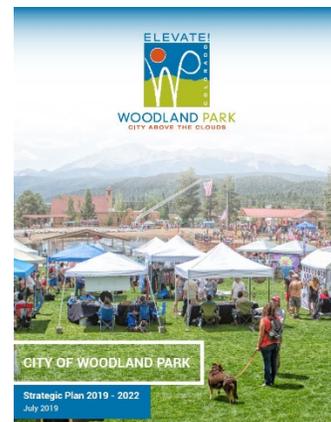


Gilpin County Strategic Plan (2019 - present)

The County Board and Manager requested that SBrand Consulting facilitate a series of teambuilding meetings (based on Strengthsfinder) and strategic planning retreats with stakeholders, partners, staff and elected officials of the County to set a new Vision and Goals for the future of Gilpin County. During the two day retreat a commitment to the Vision and Mission reenergized the team, and Goals, Priorities and Strategies (GPS) were set, with specific Action Steps that created accountability and focus moving forward. Partners and stakeholders came to the table to collaboratively create solutions to long term issues faced by the County.

City of Woodland Park Strategic Plan (2019)

SBrand Consulting conducted a Board and staff driven strategic plan with significant input from the community and stakeholder through interviews and surveys. A combination of retreats and focused meetings resulted in a long-range strategic plan with a solid implementation matrix.



State of Colorado, Department of Local Affairs, Main Street Program (2015 – present)

The State of Colorado has selected SBrand Consulting as one of the preferred contractors to design and conduct facilitated Strategic Plans across the state for Main Street Communities. All Main Street organizations are slightly different: some are nonprofit boards, some are combined with a Chamber, some are part of the Downtown Development Authority and some are committees appointed by the Towns. In that capacity, we have facilitated the creation of over 30 strategic plans.

More examples of our Strategic Plans and complete copies of these examples can be found on the website at www.sbrandsolutions.com.

Community Engagement Process Examples

Website Engagement

The website is a great place to create a page specific to the process, and to post information, have engagement, link to surveys, and share reports and photos.

Social Media Engagement

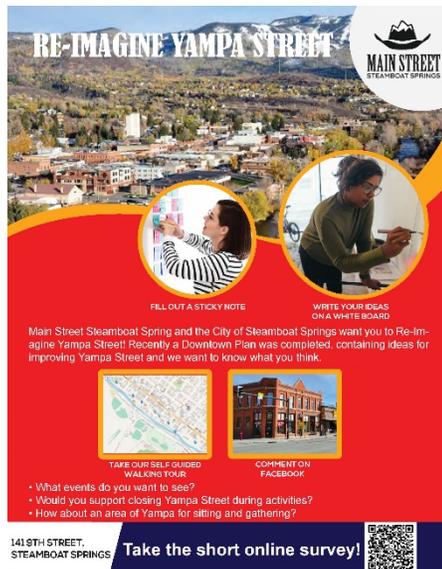
Whatever social media is used (Facebook, Twitter, TikTok, Instagram) a social media post with a question, information, or a call to action is a great way to engage with a wide range of people in your community!



Printed Engagement Materials

Flyers

Informational flyers can share details, contain links, be posted online, and be mailed.



Posters

Designed to go with the white boards, placed at event tables, and hung on display, the posters inform people about the process and allow for engagement through information and a call to action.



Postcards

Postcards can be handed out, mailed directly to participants, or left with businesses. People who might not have time to fill out an online survey, and who might prefer to write find this method of engagement easy to use.



COCONUT CREEK VISION 2030!

Help shape the vision of our community. The City of Coconut Creek is planning for our future, and we want you to give us your feedback! We would love you to answer these quick questions and drop off this postcard at City Hall, Community Center, Recreation Complex, or when you see us at an event. The community feedback will be collected through March 27th and presented at a community meeting on April 28th. Let us know if you have any questions.

- What are the biggest challenges facing Coconut Creek in the next 5 years?

- If you could wave a magic wand, what would you improve immediately?

- What makes Coconut Creek such a special place?



Coconut CREEK
Vision 2030
CITY OF COCONUT CREEK
www.coconutcreek.net
4800 West Copans Road
Coconut Creek, FL 33063



White Boards

White boards are used with pens, sticky notes, posters, brochures, and flyers to engage the public in a fun, quick and informal manner. Placed at key locations throughout the community (businesses, gyms, coffee shops, recreations centers, faith-based locations, libraries, and public buildings) they offer a way for all ages to interact with ideas.

