



City of Barre, Vermont

“Granite Center of the World”

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REQUEST FOR PROPOSALS MUNICIPAL STRATEGIC PLANNING FACILITATION SERVICES

Introduction/Background:

The City of Barre is requesting proposals from Strategic Planning Consultants specifically experienced in municipal government work to guide City its Council and administrative leadership team (staff) through an inaugural, strategic planning/goals setting process.

We have a seven-person City council comprised of a Mayor and six Councilors representing three City Wards. (Two Councilors per Ward; all have two year terms). The Mayor is elected at large, also for a two-year term. We have an experienced administrative (Department Head) leadership team working to support Council policy objectives while conducting the day-to-day operations of the City as expected by both Councilors and residents.

The Councilors and Leadership team have concluded that both groups would benefit greatly from an experienced, third party Facilitator to lead both groups through a mutual, professionally guided strategic planning process where priorities, roles, expectations, metrics, etc. are established to promote a collaborative and constructive working relationship.

The leadership team is eager to connect with the Council and engage in productive discussions about what can and can't be accomplished with existing resources and time available, clarifying and/or defining the respective roles of Council and staff, and how to establish realistic and achievable objectives at the Council level.

Process

We welcome your advice and proposal about how best to design and conduct a facilitated, strategic planning process. A recent approach used by a neighbor municipality included the following elements:

- Advance calls (virtual meetings?) with Council and key players
- Evening meeting with Council
- Day time follow-up session with Staff to review council discussion

- Evening meeting with Council and Staff to finalize key priorities
- Document drafting and Final Preparation (20 hard copies, 1 electronic)
- Follow up with staff to work on measures integration with software (these two might be within a couple weeks or a month of the initial sessions)
- Other steps, if any, as you may recommend based on experience

Note: The above is intended to be suggestive only, but by no means a specific or restrictive scope of work. We are open to your thoughts and/or recommendations as to process based on your municipal strategic planning/ facilitation experience. Also to note: in today's COVID environment, we are open to arranging virtual sessions for some of the preliminary preparatory steps; however, we look forward to an in-person, facilitated joint working session with Council and staff.

Work Product

Our objective is a written goals/strategic plan document. Plan includes specific action steps, assigned responsible parties, expected timelines etc. Plan would be prepared in a way that coordinates with software. We'd like the plan and action steps to link nicely with a strategic planning management/monitoring software (Envisio?); but there may be other good options and are receptive to your recommendations). Software cost is not part of this proposal.

The work product would also include assisting staff with developing performance measures and indicators to track progress on the plan. Attached please find copies of the current, informal goals/priorities lists of both Council and Department Heads. As you will see, they are ambitious and far reaching, and possibly include some conflicting goals, with which we need help in making decisions about realistic priorities.

Participants

The Mayor and six Council members. The full leadership team includes the City Manager, Police Chief and Deputy Chief, Fire Chief and Deputy Chief, Public Works Director, Superintendent of Water/Wastewater, Planning Director, Finance Director, Building & Community Services Director and Assistant Director, City Clerk/Treasurer and our HR/IT Administrator who is technically not a department head but still a key member of the leadership team.

Budget:

We have no fixed budget for this process, but are prepared to allocate funding in the range of \$15,000 to \$20,000.

Schedule:

We appreciate that schedule is dependent upon the availability of the consultant. That said, our goal is a one to two-month process from the time of engagement/Notice to Proceed.

Selection Criteria:

Neither schedule nor fee are exclusive selection criteria. The consultant will be selected based on the City Council's assessment of the firm and staff qualifcators and demonstrated expense, the proposal which best addresses the combination of process approach and work product, schedule and cost.

Questions/Clafications:

Should you have questions or require clafications, please feel free to contact:

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Proposal Response Deadline/ Submission Requirements:

We look forward to receiving your proposal by **12:00 noon, December 8, 2021.**

Proposals may be submitted electronically to:

Jody Norway
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6 North Main St; Suite 2
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