

Proposal to provide vision planning facilitation services

RFP 10 541

City of Fort Lauderdale

October 19, 2010

Submitted by:

Analytica

With technical support from:

Group Solutions, Atlanta, GA

Oppenheim Research, Tallahassee, FL

Options Technology, Orlando, FL

Wade Trim, Tampa, FL

Analytica

POB 998
Newberry, FL 32669
HMarlowe@aol.com

352 472 7171 Voice
888 287 3959 Fax
352 339 6090 Cell

October 19, 2010

City of Fort Lauderdale • Procurement Services Department
100 N. Andrews Avenue, #619 • Fort Lauderdale, Florida 33301
954-828-5933 FAX 954-828-5576
purchase@fortlauderdale.gov

Dear Sirs:

I am pleased to submit the firm's proposal to facilitate a visioning process for the City. Your organizational format has been adhered to as noted in the following table of contents. Having provided a similar service to a number of Florida communities, we have thought deeply about the future of cities and the future of Florida. It is our ability to assist you to think carefully and substantively about the world of 2035, while building a broad based community consensus about your preferred future, which distinguishes our firm and our approach.

A vision plan with a 25 year time frame must consider a number of alternative futures. What it cannot do is simply assume the future is more of the past. Review any 25 year time frame in our nation's history and you will find significant events and changes, many unforeseen at the start of that 25 year period. A vision plan cannot predict the future. But it can identify trends and potential issues that should be considered.

For example, this vision plan should examine topics such as:

With advances in health care the number of persons who reach 100 years of age and are healthy is expected to rise significantly. What will it mean for Fort Lauderdale if in 2035 a significant proportion of its population are healthy persons in their 90s and 100s?

With advances in technology and the clustering of the educated workforce, we are now discussing smart cities. What does Fort Lauderdale need to do to ensure that it is technologically competitive and has the environmental and social capital needed to ensure it has the workforce of the future? What soft infrastructure is needed to complement hard infrastructure?

With the increasing development of nano-technology, 3D printing, and bio-technologies, large scale smokestack manufacturing facilities and mass production may become a less significant component of the economy. Instead, greater emphasis will be given to customization and

specialization. Some label this the new artisan economy. What future could Fort Lauderdale have in as a site for the new artisan economy and small manufacturing?

With increasing concerns about obesity, food insecurity and the desire for healthier foods, should Fort Lauderdale encourage urban agriculture as many cities are doing?

The term cognitive surplus has been coined to acknowledge the time people invest in web-based voluntary activities such as contributing to Wikipedia. How can the cognitive surplus of the city be channeled to its betterment?

How does the city foster and balance economic, environmental and social sustainability so that all sectors and members of the City prosper?

These are a few of the many questions we need to consider as we seek to examine the 2035 world and where Fort Lauderdale wishes to position itself for success in that world. We bring a skilled and diverse team to these tasks that are fully prepared to support you in this examination and decision. With over fifteen years of experience in successful and impactful vision plan development and a substantive understanding of the issues facing municipalities in Florida and S. Florida, we are well prepared to assist you to achieve a high level of project success.

We of course would be pleased to discuss our approach in a presentation. The undersigned is authorized to commit the firm to this proposal.

Cordially,

Herbert A. Marlowe, Jr., Ph.D.
Principal

Table of Contents

Tab 1: Proposal Signature Page	1
Tab 2: Statement of Qualifications	4
Tab 3: Preliminary Scope of Services	19
Tab 4: Number of years experience	31
Tab 5: Project Manager	32
Tab 6: List clients for whom you have provided similar services	33
Tab 7: Cost of Services	35
Appendix A: Insurance forms	37

Tab 1: Signature Page

Analytica

POB 998
Newberry, FL 32669
HMarlowe@aol.com

352 472 7171 Voice
888 287 3959 Fax
352 339 6090 Cell

October 19, 2010

City of Fort Lauderdale • Procurement Services Department
100 N. Andrews Avenue, #619 • Fort Lauderdale, Florida 33301
954-828-5933 FAX 954-828-5576
purchase@fortlauderdale.gov

SIGNATURE PAGE

Dear Sirs:

I declare that the only person(s), company or parties interested in the proposal as principals are named therein; that the proposal is made without collusion with any other person(s), company or parties submitting a proposal; that it is in all respects fair and in good faith, without collusion or fraud; and that the signer of the proposal has full authority to bind the principal proposer

Copies of current Certificate of Insurance are provided in appendix A.

NON-COLLUSION STATEMENT:

By signing this offer, the vendor/contractor certifies that this offer is made independently and *free* from collusion. Vendor shall disclose below any City of Fort Lauderdale, FL officer or employee, or any relative of any such officer or employee who is an officer or director of, or has a material interest in, the vendor's business, who is in a position to influence this procurement.

Any City of Fort Lauderdale, FL officer or employee who has any input into the writing of specifications or requirements, solicitation of offers, decision to award, evaluation of offers, or any other activity pertinent to this procurement is presumed, for purposes hereof, to be in a position to influence this procurement.

For purposes hereof, a person has a material interest if they directly or indirectly own more than 5 percent of the total assets or capital stock of any business entity, or if they otherwise stand to personally gain if the contract is awarded to this vendor.

In accordance with City of Fort Lauderdale, FL Policy and Standards Manual, 6.10.8.3,

3.3. City employees may not contract with the City through any corporation or business entity in which they or their immediate family members hold a controlling financial interest (e.g. ownership of five (5) percent or more).

3.4. Immediate family members (spouse, parents and children) are also prohibited from contracting with the City subject to the same general rules.

Failure of a vendor to disclose any relationship described herein shall be reason for debarment in accordance with the provisions of the City Procurement Code.

NAME

RELATIONSHIPS

No relationships

I acknowledge receipt of addendums to this RFP.

Cordially,

Herbert A. Marlowe, Jr., Ph.D.
Principal

This section is presented in five parts. These are:

Part 1: A narrative statement of project understanding

Part 2: An overview of the conceptual models of visioning which underlie the firm's approach

Part 3: A brief history of the firm

Part 4: A statement of experience, competencies and knowledge

Part 5: Resumes of the project team

Tab 2: Project Understanding

Part 1: Project Understanding

The City wishes to develop a vision plan that will guide public policies, infrastructure development and investment through the year 2035. This plan should reflect the needs, aspirations and values of all residents, with particular emphasis on ensuring that the views and hopes of under-represented groups are included.

This plan should be based on a global perspective of the features of high quality of life, economically vibrant cities. Orlando challenged us to do the same in their vision plan, seeking to position themselves as a global city, capable of competing on an international basis. As such, the challenge for the Fort Lauderdale process is to understand the emerging economy, the features a community must have to attract entrepreneurs and creative workers and the particular opportunities and synergies that are available to the City. We faced this same task with the City of Round Rock, Texas, one of the nation's most economically vibrant cities, who desired a 50 year plan that would attract the creative and entrepreneurial classes to the city.

A vision plan articulates a position that the community wishes to achieve in the context of long term trends, opportunities and challenges. Sometimes these positions are transformative, other times developmental. Regardless of the scope of the vision, the vision plan creates a forward pull. It does not mandate, it does not legislate. Rather it identifies broadly desired ends, values the community wishes to maintain or enact, and high level strategies.

For a vision plan to succeed, it must represent the broad agreement of the community and must be aligned with the needs, aspirations and values of the residents. It must capture the essence of what the community wants. In Longboat Key for example we were able through extensive community engagement to capture the shared wish of the community, expressed as "Keep Longboat Longboat".

A vision plan must capture what residents want to keep and what they want to change. A vision plan is not just about change. It is also about continuity, history, maintaining community character. The vision plan for DeLand for example for highly focused on maintaining the small town feel and the historic character of the community.

For a vision plan to succeed it must be actively managed and regularly updated. We have worked with the City of DeLand for nearly ten years, each year updating their plan. Over the course of those ten years many features of the original plan have come to pass and new topics are being addressed.

You want a vision plan that will build upon your history, your successes, your strengths as a community. At the same time, as a leading city in a cutting edge region of the nation, you need a vision plan that can

lead to long term viability, vibrancy and vitality. Our processes, facilitation skill and knowledge about community dynamics, economics and productive public policies will give you this result.

Why Analytica?

Analytica is distinctively qualified to provide the requested services. We have done so for other communities of your size and complexity. We bring a strong understanding of the features that successful communities of the future must possess. We bring a diverse team capable of interacting with all members of your community. We bring the analytic capacity to accurately understand and articulate your current condition and the creative thinking and design skills to identify future alternatives. We are highly experienced in community engagement with a broad range of communities and are very skilled in building consensus among differing interest groups. We understand Florida, the particular challenges of S. Florida and the policies and investments that will need to be in place to build a quality, globally competitive city.

In addition to our skills, we have an extensive track record of quality, on-time, within-budget performance. We enjoy our work, bring enormous energy and enthusiasm to the work and are skilled at fostering that same energy and commitment within the communities and organizations with whom we are privileged to work.

Finally we bring a rich understanding of visioning both as a concept and as technique. The following pages present our conceptual model of visioning. A vision process is a multi-faceted event which adds value in several ways to the community. The following one page descriptions discuss visioning from four perspectives, each of which is valid and which together add significant value to a community.

Following the presentation of our conceptual model of visioning, a standard statement of experiences, competencies and knowledge is presented. This is followed by biographical statements.

Part 2: Conceptual Models Which Underlie the Firm's Approach to Visioning

Visioning as the act of leadership



The execution of a visioning process and development of a shared future vision is an act of leadership. It is so because leadership consists of envisioning future opportunities and challenges, developing strategies to meet those opportunities and challenges and ensuring those strategies are aligned with the community's needs, values and aspirations.

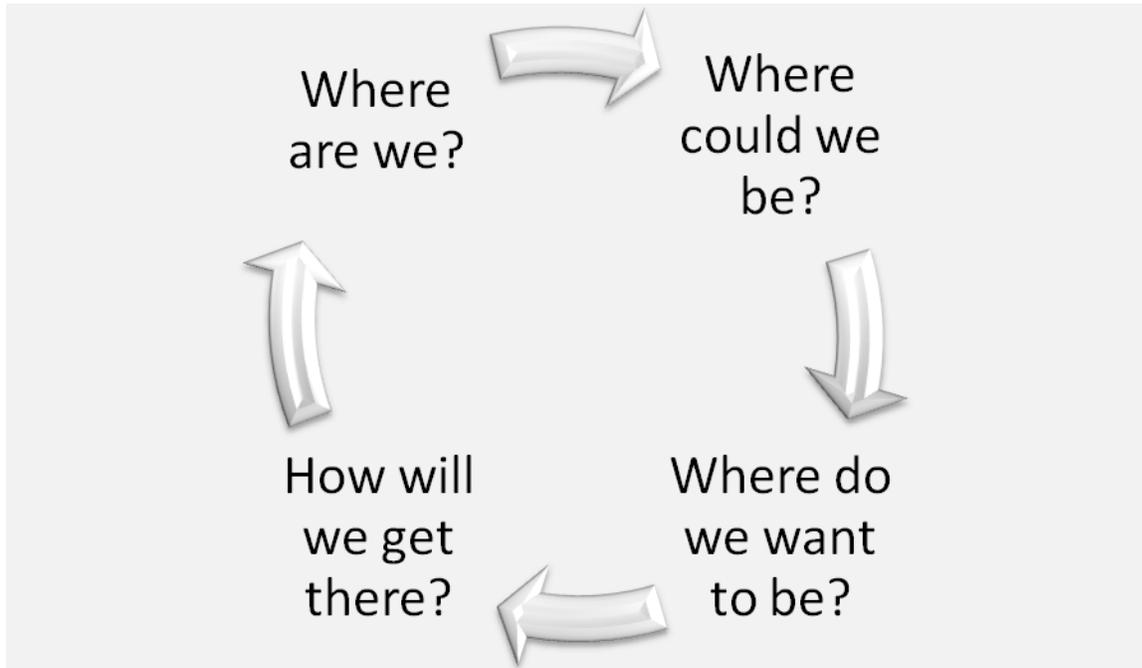
For leadership to be effective, it must be aligned with the community's needs, aspirations and values. At the same time effective leadership may push those needs, aspirations and values. It may reframe needs by assisting the community to focus on self interest rightly understood instead of short term needs. It may expand or embolden aspirations by articulating new and challenging opportunities. It may call upon our "higher angels" to stress those values which better the community in the long term.

At the same time effective leadership must be reality based. It must understand current conditions, whatever the mix of positive and negative. It must understand external forces and how they impact the community. In a globally competitive environment, leadership has to realistically assess the community's strengths and weaknesses while facing up to threats and carefully assessing opportunities.

As much as leadership must recognize today's realities, it cannot be bounded by those realities. The world always changes and today's weaknesses can become tomorrow's strengths (and vice versa). Leadership has to envision future alternatives, better solutions, and new possibilities.

Finally, effective leadership executes. Ideas and concepts must be moved into the realities of investment, development, and programs.

Visioning as answering four strategic questions



The visioning process can be understood as asking and answering four strategic questions.

Where are we? This question seeks to understand the current state or condition of the community. What are its strengths and weakness? What threats does it face? How does it compare to other similar communities? What trends exist? Answers here frame the starting point for the effort.

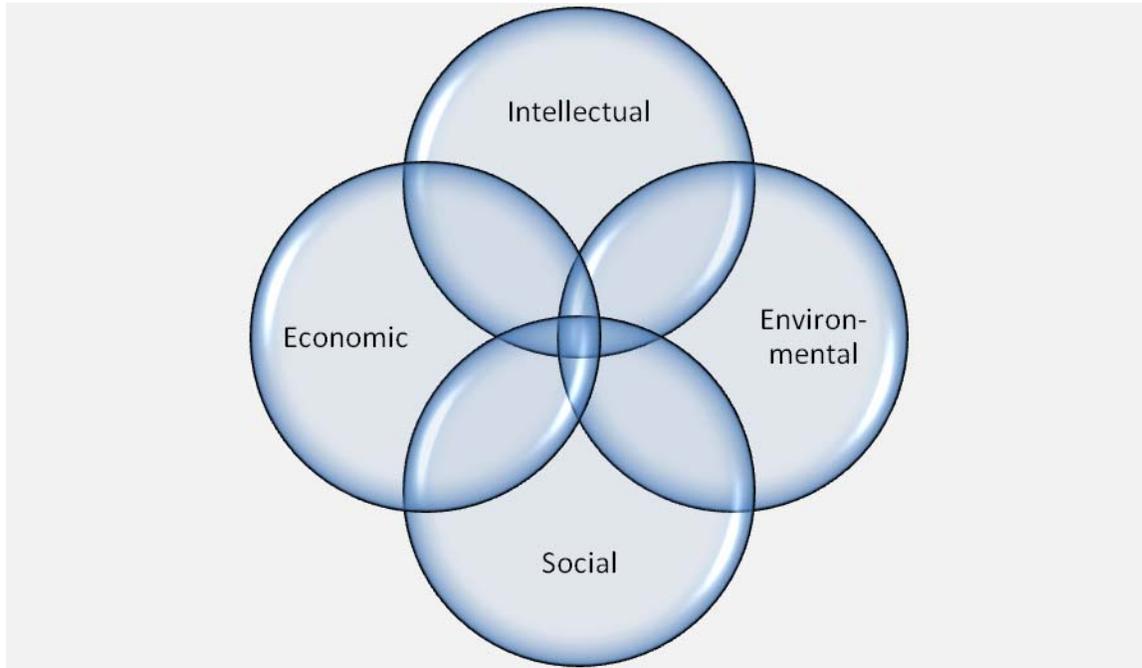
Where could we be? This question seeks to understand the alternative futures that are realistically available to the community? What new economic engines are possible? What desirable features could be developed? What regional, national and global positions are achievable? Answers here frame the strategic choices before the community.

Where do we want to be? Of all the options available to the community, which does it prefer? What type of community do the residents and stakeholders want it to become? The answer here states the position the community will seek.

How will we get there? What are the investments, sustained efforts and strategies, and community collaboration that are needed to achieve the vision? How will those efforts be made and managed?

How can a sustained effort be developed and supported? Answers to this question enable the community to execute over the long term.

Visioning as strategy for Capital Development



For any community to prosper and thrive in the future four forms of capital are required. Visioning is the process of your current strengths and weaknesses with respect to each form of capital following by developing strategies to grow these four forms of capital.

Economic capital. These are the strategies that will generate financial wealth for the community. Growing local businesses, developing a competitive workforce, attracting new and growing industries, creating synergies are all elements in this strategy.

Intellectual capital. In a knowledge-based economy, knowledge and intellectual skill are critical. In addition to being critical for economic development, there is a growing recognition of the worth and importance of intellectual capital for broader community development goals related to quality of life, arts and culture and other creative endeavors.

Environmental capital. Attractive natural and built environments provide competitive advantages to communities, draw tourists and appeal to residents as places where people want to live and work. Historic preservation, public amenities, natural settings are all elements in this strategy.

Social capital. Effective working relationships among community members that can get things done distinguish successful communities. Strategies that optimize community diversity, bring benefits for all and develop processes for on-going collaboration exemplify growing this form of capital.

Visioning as consensus on results



A well designed and facilitated vision process leads to broad community concurrence on the results the community seeks. Results are ends that the community values in and of themselves such as community safety, a prosperous local economy, access to quality of life features such as recreation, health care, arts and culture, an aesthetically attractive community, opportunities for their children, a protected natural environment.

The key to the long term success of a vision plan in a results-focused approach is to maintain the emphasis on results. There will of course be differences of perspective on any one of the above listed results. These differences should not overwhelm the broader and underlying agreement about the result. By maintaining the emphasis on results, a sufficiently broad consensus can be kept so that action occurs.

One of the strengths of a results-focused approach is its flexibility and adaptability to the future. While it generates strategies, it views strategies as simply means to an end, i.e. the desired result. Strategies come and go depending upon their effectiveness. Current and future leadership bodies are not tied to specific strategies but rather committed to the results. The results-focused approach is not prescriptive about the strategies that future bodies should employ, but it is directive toward the ends or results they should be striving to achieve.

Part 3: Firm History

Analytica was founded in 1987 and has operated continuously and successfully since that time. Structured as a DBA sole proprietorship, its owner is Dr. Herbert Marlowe. The firm's primary client base is in Florida but it regularly completes projects in other states.

The firm provides two primary services. One is the design and facilitation of planning and decision making processes which involve multiple stakeholders, cover complex and at times controversial topics and require a high degree of stakeholder consensus for action to occur. Examples include community vision plans (Palm Beach County, Naples, Osceola County), organizational strategic plans (Orlando, Round Rock Tx, Pinellas County, Florida Redevelopment Association), economic development plans (Daytona Beach, Glades communities), development of multi-party strategies on public policies such as water supply (Tampa Bay Water), environmental protection (Kissimmee Chain of Lakes), transportation (Tampa Bay Regional Transportation Authority), school readiness (Florida School Readiness Coalition), educational reform (Charleston SC Education Summit) and emergency readiness for human services recovery (Pinellas County).

The second service is organizational analysis and development. These are studies of various policies or programs that lead to improvement recommendations and/or new strategies. Examples of projects include a study of telemedicine effectiveness for the Florida Department of Health, an in-depth study of homelessness for Pinellas County, a study of health needs in the Glades region of Palm Beach county, an analysis of the economic impacts of investment in children's services for the Naples Chamber, a number of salary and compensation for public and private clients, a study of family services delivery for the Juvenile Welfare Board of Pinellas County, a study of public health care administration alternatives for Volusia County, staffing level studies for the mental hospital systems of Maryland and Florida, development of community health indicators for Martin County and a study of non-profit leadership in the Tampa Bay region. The firm is fully conversant with the tools of quantitative and qualitative analysis.

The firm works extensively with public and non-profit clients and occasionally with private sector clients in the fields of agriculture, privatized municipal services, engineering, planning and science. Over the course of its history the firm has worked in all regions of Florida with clients ranging in size from Miami-Dade County to some of the smallest municipalities in the state. As a result the firm is highly conversant with the public policy and economic challenges of the state. As a result of its work in the health and human services sector as well as economic development in rural and urban poverty areas it is highly familiar with the challenges facing disadvantaged and under-represented groups.

Part 4: Statement of Experience, Competencies and Knowledge

Development of an effective and community “owned” vision plan requires experience, a number of competencies and knowledge of visioning approaches, technologies and techniques. The firm has developed this experience, competencies and knowledge during its twenty-three year existence as summarized below.

Extensive experience in vision and strategic planning

The firm has facilitated development of well over 100 vision, strategic plans and goal agendas for local governments, state associations, foundations, non-profits and private sector firms as well as provided consulting services on various organizational development topics and conducted a variety of studies on public policy topics. Some Vision Plan projects of note include:

- **Orlando, Florida.** This strategic vision plan sought to re-position Orlando not only as a leading tourism center but as a global city in the bio-tech and digital imaging sectors. It was followed by training on business planning approaches and organization of business planning teams.
- **Round Rock, Texas.** This strategic vision plan sought to prepare Round Rock to successfully transform from a population of 100,000 to 250,000 over the next thirty years. Corporate home of Dell Computer, Round Rock is consistently ranked as one of the nation’s most business friendly and safe communities. This plan addressed the economic, workforce and demographic changes facing the city and how to successfully manage those changes.
- **Naples, Florida.** This vision plan established a community driven vision regarding maintaining key features of the City in the face of outside growth. A vision action plan of specific goals and strategies was developed using a wide variety of techniques.
- **Longboat Key, Florida.** This vision plan addressed key transition issues for a community facing substantive challenges in retaining retail services while not wanting to become a high-rise coastal community.
- **DeLand, Florida.** The firm developed a vision plan that led to a subsequent strategic plan for city government which has been annually updated and enacted for the last seven years. It has led to significant downtown re-investment as well as a number of quality of life features.
- **Palm Beach County.** The firm developed a county-wide vision plan that addressed four critical issues regarding the future of the County.
- **Tallahassee/Leon County.** The firm developed a vision plan to position the community as the capital community of Florida while supporting economic diversification.
- **Pinellas County, FL.** Pinellas County, home to St. Petersburg and Clearwater, is Florida’s most urbanized county. This plan addressed a full range of public services in the context of Pinellas being the first county in Florida to face a full-scale redevelopment challenge.

Extensive experience in vision and strategic planning under conditions of fiscal strain. The firm has developed a number of vision or strategic plans. These plans have often addressed questions of “what businesses should we be in”? “How can we be more efficient or productive”? How do we work with our citizens to establish priorities and build an understanding of limitations”? The firm has done projects of this type with Brevard, Charlotte, Lee and Palm Beach counties as well as DeLand and Temple Terrace.

Extensive experience in stakeholder engagement. All of the firm’s vision and strategic plans and other projects have a stakeholder engagement component so that considerable experience has been developed in many of the techniques of community engagement. Dr. Marlowe has spoken at conferences on the techniques and approaches to effective public engagement..

Extensive experience with under-represented communities. Whether it be farm workers in the Glades area, Mayan Indians in Palm Beach County, persons with HIV/AIDS, race relations conflicts in St. Petersburg, persons with behavioral health issues, the developmentally disabled, the urban poor, abused children or other groups, the firm has a long history of working with non-mainstream groups.

Competencies

Strategy and plan management. The best developed plan is of little value unless it is implemented. That is not to deny that plans must change as events unfold, but plans must not simply set on the shelf. Strategy and goals evolve and therefore a strategy management system should be in place to ensure the plan is not only actively implemented but also adapted and updated over time. A key part of strategy management systems are performance indicators. The firm’s work on performance indicators has emphasized the development of highly useful and information critical indicators so that we avoid measuring the minor and missing the major phenomenon.

Skilled at engaging stakeholders and staff in the development of the plan in a time-efficient manner. For a plan to succeed it is critical that stakeholders and city staff both own and understand the plan. For this to occur that must be involved in the development of the plan.

Skilled at integrating other internal plans into the vision, strategic or goals plan. Many communities have other plans in place or under review while the vision plan is being developed. It is critical that all plans complement each other and that there are connections to the strategic plan. This is a regular feature in the firm’s vision and strategic planning efforts. It requires communication among all involved staff and consultants and a willingness to understand the needs and issues each plan is addressing.

Translating vision to results, goals and strategy. Vision, strategic and goals plans have two core components. The position you wish to achieve (vision and results) and how you plan to achieve it (goals and strategies). Whatever your vision is, the plan will identify the results, goals and strategies that will achieve that vision. The ability to assist in formulation of vision and translation of vision to action are two core competencies we bring to the project.

Consensus building. Our work often involves highly complex and controversial public policy issues such as water uses, environmental land uses, development of transit systems as well as community controversies such as public facility siting, bicycle and walking paths and the use of city roadways, hours of entertainment districts, siting of big box stores, library operations and locations, location of human services. We are very skilled in helping groups analyze and address the topic and develop some broad-based solution acceptable to most of the participants in the process.

Skilled in report writing. We have written many strategic plans and technical reports and attempt both for clarity of language and user-friendly information design.

Exceptional facilitation skills. Dr. Marlowe completed his doctoral dissertation on the topic of social intelligence with addressed the verbal and non-verbal dimensions of group interaction. He has over 35 years of experience as a facilitator and has provided facilitation services on a wide range of topics, with groups of varying size, professional backgrounds and professional roles, and on many complex and controversial topics. He has developed a number of techniques to assist in task and problem clarity, creative thinking, problem-solving, strategy development and decision-making. He has facilitated meetings and processes involving line staff to CEO's and elected officials, from small groups of 3 to 6 persons to large groups of 3,000 persons.

Process design and emergent process skills. The firm is very skilled at process design and emergent process. Process design refers to the creation of communication, problem-solving, creative-thinking and decision-making activities and steps. Emergent design refers to the reality that projects involving complex issues and multiple stakeholders are dynamic. Emergent design refers to adapting and modifying the original process architecture to fit the needs and context of the current situation.

Knowledge

In-depth knowledge of visioning processes, techniques and technology. Herb is the author of several papers on visioning, including a review of over 110 visioning techniques. Facilitation of group thinking and decision processes is his specialty.

Substantive understanding of public policy issues facing municipalities. The firm has done extensive work with local governments in Florida and is highly conversant with the issues they face.

Substantive understanding of South Florida, including Broward County. The firm has done extensive work in Broward, Miami-Dade and Palm Beach counties. In Broward County the firm has worked with public entities such as the Children Services Council, Broward County Government, Davie, Cooper City, North Lauderdale, Lauderdale Lakes, and the Coral Springs Utility District. The firm has also done work with private firms within the county.

Part 5: Biographic and Associated Firm Statements

Brief biographies are provided for Analytica team members and Wade Trim members. Firm descriptions are provided for Group Solutions, Options Technology and Oppenheim Research.

Analytica

Herbert Marlowe, Ph.D., the principal of Analytica, is a specialist in process design and facilitation. He combines expertise in process facilitation, creative thinking, conflict resolution and group decision making to help his clients develop consensus on effective strategies to achieve their desired results. In this project he will serve as the project manager and team leader for the community visioning effort.

With over thirty years of consulting experience, Herb has assisted communities and organizations to develop visions and strategies on a broad range of issues in a wide number of fields including: community development, agriculture, health, mental health, human services, transportation, community redevelopment, economic development, downtown redevelopment, criminal justice, organizational re-structuring, human resource issues, recreation and culture, public utilities, tourism, race and cultural relations, science and engineering, marketing and development, and environmental. In each of these areas he has applied his particular skills to assist groups to analyze the issue, develop alternatives, and prioritize an action plan to move forward toward some shared goal.

Within this broad experience, he has developed particular expertise in working with communities to develop vision and strategic plans. He has particular experience in working with dis-advantaged and minority communities as well as with corporate and executive interests. His most recent writings and speeches address the question of how to build consensus on complex and controversial topics. He has been actively involved in all the firm's vision projects.

His facilitation work with private sector, public sector and third sector clients at local, state and national levels on a wide range of topics enables him to bring a diverse set of perspectives to any issue. His skills in active listening and idea synthesis assist clients to frame challenges and opportunities in new and solvable ways. His skills in conflict resolution and consensus building help groups work through challenges in constructive and synergistic ways that build better solutions in the end. His ability to translate ideas into practical steps facilitates the development of workable actions plans that lead to real progress. His use of technology and user-friendly visual language techniques clarifies complex issues, facilitates diagnosis of key issues, fosters creative thinking and consensus building and serves to illustrate roadmaps to desired ends.

Author of numerous books and articles, he received his Ph.D. from the University of Florida, where he specialized in process facilitation and strategy in the areas of organizational change and effectiveness.

Larry Arrington, M.A. Larry is an experienced Florida public administrator who has provided consulting services to many local governments throughout the state. He has an superb understanding of the issues facing local governments both in the short and long term. For this project he will contribute to the current conditions report as well as interview many of the community leaders. Larry has co-authored with Herb a book on Sustainable Governance which focuses on how local governments can develop more effective governance approaches.

Mary Gamble, Ph.D. Mary brings particular expertise in current educational reform efforts. She serves on the National United Way Committee on Education Reform, along with the U.S. Secretary of Education and other corporate leaders, she is heavily involved in the Gates Foundation work in the area and she led the successful proposal of the Hillsborough School District for the Race to the Top award. She will work with the education focus group and sector in this process.

David Kautz, B.A. David has extensive experience in economic development in Texas with a successful track record of both recruitment and local business growth. He also brings extensive experience in public finance. He will join with Mike Sabine on the analysis of current conditions.

Thamara Labrousse, B.A. has done extensive work in the South Florida region with minority groups and community based organizations. For this project she will take the lead on interactions which involve the Haitian community.

Mac McDowell, B.A. Mac has a background in health care, social services and community race relations. In this project he will take the lead on interactions which involve the African-American community.

Marta Pizzaro, M.P.A. Marta has done extensive consulting on social service topics and has done extensive work with community based organizations in the South Florida region. For this project she will take the lead on interactions which involve the Hispanic community.

Michael Sabine, M.A. Mike is a public policy analyst with extensive experience in public finance as well as management of various public programs in Georgia. In this project he will concentrate on the financial, economic and infrastructure components of the current conditions analysis.

Wade Trim

WadeTrim is a full service architectural and engineering firm with experience in community visioning and the state's growth management approaches. Their particular roles in this project will include participation in the current conditions analysis, support of web-based services, and participation in the formulation of the strategic choices report. If visual renderings or visual representation of community ideas and preferences are needed they will provide those services. Finally, if the City selects some of the larger forums that require additional staffing they will provide the back-up staffing for these events. The key members of Wade-Trim who will participate in this project are introduced below.

Russell Moore, M.A. Russell is a landscape architect with extensive experience in community redevelopment in Florida and other states. He and Dr. Marlowe have an extensive collaborative work history going back over twenty years. For this project he will lend a particular perspective on the current conditions of redevelopment.

David Gildersleeve, M.A. As Senior Vice President and Member of the Board of Directors for 17 years, Dave Gildersleeve is intimately involved in all phases of Wade Trim operations. With over 35 years of professional planning experience, 23 years with Wade Trim, Dave routinely serves as Principal-in-Charge, Client Manager and/or Project Manager on major public and private planning, land development, and transportation projects. Areas of specific experience include EAR/Comprehensive Plans, land development regulations, waterfront planning and design, parks and recreation master planning, downtown and neighborhood development/redevelopment studies and plans, visioning and public participation, Developments of Regional Impact (DRIs), and Planning, Project Development and Environmental (PD&E) studies. Visioning and Comprehensive projects he has managed include Venice, Pasco County, Clearwater, Belleair Beach, Palmetto, Tampa as well as various plans for other communities such as Bradenton, Port Richey, Cape Coral, Lee County, Manatee County, Oviedo.

Chad Minor, B.A. Chad provides more than 10 years of public and private planning experience, including land development consulting, development review, project management and economic development. He is a land use planner experienced in entitlement planning, neighborhood and community planning, permitting, development review, local and regional code regulations and community consensus building.

Amanda Warner, B.A. Amanda has more than eight years of planning experience with Wade Trim in site planning, parks and recreation master planning, and state-mandated comprehensive planning. Her experience includes data collection, analysis, survey generation, workshop coordination, and master plan preparation. Recent projects on which she has worked include the City of Venice Evaluation and Appraisal Report (EAR) and the EAR-Based Amendments to City of Venice Comprehensive Plan, as well as the City of Dunedin CRA Master Plan and Citrus County User Fee Benchmarking Study.

Amanda also has extensive experience with planning-related applications of Geographic Information Systems (GIS). Using ArcGIS software, she has performed analysis for land use compatibility, transportation impact, parks and recreational facility needs, utility master planning, housing and population trends, and environmental resource and floodplain management. Amanda's knowledge of GIS and experience with public involvement make her a valuable resource to clients seeking outcomes based on informed decision-making.

Other Associated Firms

Group Solutions, Atlanta, Ga. Group Solutions is a specialty provider of group thinking and writing software that enables a group of up to 250 persons to engage in a live, multi-participant discussion about the topic at hand. This technology generates a vast amount of information while quickly

facilitating concurrence on topics. Some of the firm's clients include the Tennessee Valley Authority, the Air Force, Georgia Tech, the U.S. Army Corp of Engineers, the Centers for Disease Control, Office of the Governor (Georgia), Auburn, and the Carter Presidential Center.

Dr. Marlowe has done several projects with Group Solutions including a 250 person session on restructuring of the public education governance model for Charleston, SC.

Oppenheim Research, Tallahassee, FL The firm is a full-service research firm offering a complete range of research programs designed to provide its clients with clear, concise and highly reliable information upon which they may formulate successful strategies and plans. Because the firm believes an aware and informed client makes the most effective marketing, policy and management decisions, Oppenheim Research also offers programs which accurately measure the potential and actual effectiveness of those plans. Based in Tallahassee, Florida, the firm serves both large and small clients at local, regional and national levels for survey research and marketing projects.

The firm has done over 500 surveys for a range of clients, including the Hillsborough County, Pinellas County, the City of Naples, Franklin County, the Agency For Workforce Innovation, Florida A&M University, Florida Education Association, Florida State University, College of Social Sciences, Tallahassee Community College, United States Institute for Theater Technology, Inc., University of Florida Tissue Bank, University of South Florida College of Public Health, University of West Florida, the University of California at Berkeley, the Corporation for Public Broadcasting, the Florida Medical Association, Florida International University, the American Petroleum Institute, United Way of the Big Bend, the Florida Association of Insurance Agents, Colonial Pipeline Co., the Florida Department of Transportation, the Florida Department of Labor, the Executive Office of the Governor, the Florida Game & Fresh Water Fish Commission, the Florida Department of Health & Rehabilitative Services, the Florida Department of Revenue, the Florida Department of Environmental Protection, the Consolidation Charter Commission and other local, regional and state organizations.

Dr. Marlowe has worked for several years with Oppenheim Research. Together they have developed public opinion surveys related to visioning projects.

Options Technology, Orlando, FL. Options Technology specializes in the use of electronic polling technology. Dr. Marlowe has a license and equipment to conduct 50 person sessions using their technology. For larger sessions, he partners with Options Technology. The largest session they have done was a 3,000 person session for the Osceola County Visioning process.

Our proposed scope is presented in five parts.

Part 1 introduces the overall visioning approach consisting of four elements is first presented.

Part 2 introduces the three key processes of visioning.

Part 3 provides an overview of techniques.

Part 4 provides an overview of the specific approach proposed for Fort Lauderdale along with a time line for the project.

Part 5 provides a list of deliverables.

Tab 3: Preliminary Scope of Service

Part 1 - Visioning: The Four Elements



The Vision planning process consists of four elements. While the specific activities within each element vary by project, the information and decisions generated in each element are required for an effective business plan.

Context Analysis – where are we? This element produces a “current conditions” or “current state” analysis. Using quantitative and qualitative data, this element describes the current realities, pro and con, of a community. Demographics, infrastructure, economic climate, fiscal condition, workforce, quality of life, education, health care are some of the community characteristics examined in this element. In context analysis we examine the strengths and weaknesses of a community from various perspectives.

Opportunity Analysis - where could we be? This element gets “out of the box” to understand demographic, technological, social, and social changes that can change the community, which offer the community opportunities that may differ from the past. One of the great errors in visioning is assuming that the future is simply an extrapolation of the past. This element uses a range of techniques and approaches to ensure we avoid this error.

Strategic Choices – where we want to be? Using the description of where we are and where we could be, this element turns to the question of the future the community wants. Again, a range of techniques are used to understand the needs, aspirations and values of the community, the real options before the community and the future that the community wants to create and achieve. This element produces the “vision statement” as well as a list of desired results if such are not adequately expressed within the vision statement.

Strategic Action – how we will get there? Once the vision, the future position is articulated, this element turns to the practical question of how to translate a vision into action. What strategies will achieve the desired end, how will the community enact those strategies, resource them and manage them to success? These are the questions

we answer both by articulating strategy and creating structures and processes that will enact those strategies over time.

Part 2 - The Community Engagement Process and how it adds value



Needs, Aspirations, Values. The most fundamental information that a community engagement process generates is an articulation of the community's needs, aspirations and values. If leadership toward a preferred future is to occur, there must be an alignment of leadership action and strategy with community needs, aspirations and values. Without this alignment, leadership and action will not occur.

Priorities. Communities, as do individuals, have a number of interests and wants. Just as with the rest of life, resources are always limited and so priorities must be established. A key aspect of community engagement is eliciting and reaching concurrence about priorities.

Ownership and Acceptance. Visions which are aligned with needs, aspirations and values and developed through collaborative processes are likely to be viewed as the community's plan. They are more likely to be accepted as valid and needed and more likely to reflect the sense of community ownership.

Willingness to support. The true test of a vision is whether the community will provide the support required for the vision to evolve and occur. Willingness to support occurs as the vision plan reflects the community's needs, values and aspirations, is a result of ownership and acceptance generated from consensus building processes and reflects public confidence generated by focused effort and priority setting.

Part 2 - Opportunity thinking: The process of envisioning alternative futures



What is it? Each of us is constrained in our ability to think about the future by our experiences and information. This lack of information or experience limits our ability to foresee opportunities, trends, or changes that may occur. Yet when we look backward in time we can readily see that the future is not a simple extrapolation of the present. Whether it be the end of the Cold War, the development of the computer, the end of segregation, economic recession or economic growth there are events which changed the world as we knew it.

Opportunity thinking is drawing upon the knowledge and experiences of many persons, some within the community and some without, so that a broader view of possibilities, trends, and changes occurs. With this broader information and experience base, we may be able to see new possibilities for our community.

Why is it important? Henry Ford is quoted as saying, “if I had asked people what they wanted, they would have said a faster horse”. As critically important as the needs and aspirations of community members are, if we stop there we will limit our thinking and restrict our opportunities to develop a community that is even more fulfilling of the values that we hold.

How do we do it? Without going into specific techniques we have developed, our general approach consists of the following:

- Bring large groups of people together to expand the information and experience base
- Add to that the thinking of outside persons who think deeply about trends, and alternative futures
- Articulate the assumptions which are currently held about the future and challenge those assumptions

- Develop alternative scenarios of the future and test those in various forums
- Identify from the above discussion opportunities and select in the strategic choices stage those the community wants to pursue.

Part 2 - Consensus building: Keys to a successful process



What is consensus building? Consensus building is the process of developing broad agreement about ends and goals so that action may begin toward the particular project. Consensus does not mean 100% agreement. Rather it means there is a range of support ranging from active to acceptance that is willing to allow the project to move ahead. Consensus building is the process of refining a project to the point that the long term self interest of the key stakeholders are met or at least not harmed, even if there are short-term trade-offs.

Why is it important? The enactment of a vision is a multi-year process that will require ongoing community support and dialogue. There will be points of disagreement, points where priorities have to be set. If there is not broad consensus at the start, the efforts to translate the vision into reality has little chance of success over the long term.

Keys to successful consensus building

1. Begin with points of common ground. Don't start off with the most contentious issue.
2. Focus on long term goals. Concentrate on the ends and don't get caught up in the how.
3. Legitimize self interest but focus on defining long term self-interest.
4. Focus initially on relationship building. When people can develop some level of mutual trust consensus comes much more easily.
5. Listen to what is being said "beyond the words" and then articulate that. What is the underlying concern? What is the aspiration or value implied or implicit the verbiage?
6. Allow time for percolation and re-circulation. Sometimes ideas need to be re-thought or re-examined before a consensus can emerge.

7. Don't get ahead of yourself. Sometimes once we concur on a broad goal we want to get agreement on specific steps. It is always harder to get consensus on details. We should not move to details before we actually need to move to them.

Part 3 - The techniques and technology of visioning: Basic and Advanced Techniques

Basic Techniques. The following are basic techniques that are in general use by visioning facilitators. Many of them will be found in the specific methodology that Analytica will propose.

Context Analysis	Demographic analysis, force-field analysis, review of current or prior plans, interviews, focus groups, town hall meetings, neighborhood forums, visual preference surveys, satisfaction surveys, study circles, infrastructure analysis, workforce analysis, economic indicators analysis, community benchmarking, SWOT analysis, values analysis, current conditions reports, Web survey, Social media, Vision Fairs
Opportunity Analysis	Trend analysis, Scenario development, Review of "futures" literature, Vision statements, Delphi survey, Social media, Best practice analysis, Comparable communities analysis
Strategic Choices	Charrette, Leadership Summit, American Assembly, Presentations to governing bodies, Web-based discussion, Cost-benefit analysis, Nominal Group technique
Action Planning	"Keeper of the Flame" entity, business plan, community scorecards

Advanced Techniques. These are techniques for which some special training or background is required. Therefore they are not widely used in visioning processes. Analytica is competent in each of the techniques listed in the chart. Some of these will be found in the specific methodology Analytica will propose.

Context Analysis	Open Space, User Panels, History time-line, Asset mapping, Values mapping, Q-sorts, Data Envelope Analysis, Sketch Parks, Idea mapping
Opportunity Analysis	PEST analysis, Framing, Scanning or Forecasting workshops, Citizen juries, Storyboarding, Sketch Parks, Q-sorts, Idea mapping
Strategic Choices	PMI analysis, Feasibility Analysis, Common Good Conference, Backward Results Diagramming, Paired comparison analysis
Action Planning	Grid analysis, Action/Priority matrix, Urgent/Importance matrix, Ansoff matrix, Boston matrix, Pareto analysis, Critical linkage ranking

Part 3 - Analytica's Distinctive Techniques

Analytica has developed a number of distinctive techniques which require special skill or technology. These include:

Electronic polling. The firm uses a software program with keypads that allows for anonymous polling of participants on topics with immediate feedback of results on a projection screen. A number of potential vision statements can be tested by having the group rate the statements on a Likert scale. Or priorities can be established through an electronic ranking exercise. This technology ensures everyone's perspective is accurately stated and it vastly speeds up the process since the results are immediately seen and the need for non-productive discussion decreased.

Hypothesis testing. Hypothesis testing (which uses the electronic polling technology) involves formulating a number of hypotheses about future issues and then testing those issues with informed groups. This technique is especially valuable as a means to make assumptions about the future public with subsequent validation or not. Any topic that can be framed as an "if-then" can be subjected to hypothesis testing.

Visualization and strategy maps. Strategy maps are visual illustrations which link the vision and outcomes/results to strategies and actions. They demonstrate visually understand the pathways to the future.

Positioning Statements. Developed to supplement brief vision statements, positioning statements provide a longer narrative which provides the thinking behind the vision. These

statements capture the rich discussion from which the vision statement has emerged. They have significant archival value for future bodies because they provide the rationale for the vision.

Distinguishing Values. Rather than generate a list of generally favored values, the firm uses a variety of techniques to understand the values that generally distinguish a community from other communities. It is these values that the vision must enact over time.

Multi-dimensional SWOT. Traditional SWOT approaches consider a strength a strength, a weakness a weakness, etc. Our approach illuminates how a strength in one context may be a weakness in another, etc. This approach enables much more creative strategy development.

Needs, aspirations and values survey. Most visioning surveys focus on satisfaction or preference. We do those of course but we offer a more sophisticated survey that seeks to elicit underlying aspirations and values which also distinguishing needs from wants.

IDEA-Lab. This is creative thinking process that uses a variety of techniques to help community members "get out of the box" when thinking about the future of the community.

Assumptions testing. We seek to examine assumptions about the future by using a variety of techniques to elicit and discuss the validity of various assumptions. Challenging assumptions is a valuable way to foster creativity.

Natural setting conversations. This technique uses trained community members to conduct interviews and small group discussions. It is

particularly useful in settings where “outsiders” are suspect.

Part 4: Proposed Methodology for Context Analysis

Since you have requested “basic”, “moderate” and “comprehensive” costs, the method for each level of approach is presented in this method section. The time frame is also included.

Scope	Type and Number of Events	Time Frame (Months)
Basic	<p>Review of existing plans.</p> <p>Current conditions analysis including inventory of City facilities, waterways, beaches, neighborhoods, economic activities, educational resources, city governmental structures, & regional/related governmental structures including comparable community benchmarks.</p> <p>Demographic analysis</p> <p>Public engagement via the following activities:</p> <ul style="list-style-type: none"> • Twenty interviews with selected community leaders (covering context & opportunity); • A focus group on each of the following topics covering context & opportunity): <ul style="list-style-type: none"> ○ Community Identity/Image/Attitude; ○ Economic Development; ○ Education; ○ Government; ○ Infrastructure/Transportation (Inclusive of funding methods to support same); ○ Marine Interests and Industries; ○ Public Safety; ○ Quality of Life/Neighborhoods/Parks/Recreation; ○ Tourism Interests and Industries. • Ten neighborhood “Town Hall” meetings to discuss both current context and opportunity • Three city-wide “futuring charrettes” that will address both current context and opportunity <p>Establishment of web site for resident input.</p>	1-3
Moderate	<p>All of the items described in the “basic” category plus the following additional public engagement activities:</p> <ul style="list-style-type: none"> • Scientific public survey on “needs, aspirations and values”; • 150 hours of “natural conversations” using locally residents specifically trained to conduct such conversations in their neighborhoods or schools covering both context and opportunity. • Development of social media program 	1-4
Comprehensive	<p>All of the “basic” and “moderate” plus the following additional activities:</p> <ul style="list-style-type: none"> • An Open Space forum for up to 300 persons. These are designed to 	1-4

	<p>allow any topic of concern to be surfaced.</p> <ul style="list-style-type: none"> • An additional thirty (30) individual interviews; • An additional 150 hours of “natural conversations”; • An additional ten (10) neighborhood or school based meetings. 	
--	--	--

Part 4: Proposed Methodology for Opportunity Analysis

Since you have requested “basic”, “moderate” and “comprehensive” costs, the method for each level of approach is presented in this method section. The time frame is also included.

Scope	Type and Number of Events	Time Frame (Months)
Basic	<p>Review of futures literature to identify key trends and opportunities</p> <p>Public engagement via the following activities:</p> <ul style="list-style-type: none"> • Five (5) IDEA-Labs (20 participants each); • Interviews with local business leaders from the ten most dominant economic sectors to identify sector specific opportunities; • Twenty interviews with selected community leaders (<i>As covered in context analysis</i>); • The focus groups identified in the context analysis would also address opportunity; • Ten neighborhood/school “Town Hall” meetings to discuss both current context and opportunity <i>As covered in context analysis</i>); • Three city-wide “futuring charrettes” that will address both current context and opportunity <i>As covered in context analysis</i>). 	1-3
Moderate	<p>All of the items described in the “basic” category plus the following additional public engagement activities:</p> <ul style="list-style-type: none"> • An analysis of the opportunities being considered by the City’s five most comparable competitors. • Five (5) repetitions of a visual preference survey to allow up to 250 residents to participate; • Five (5) additional IDEA-Labs; • 150 hours of “natural conversations” (<i>As covered in the context analysis</i>) 	1-4
Comprehensive	<p>All of the “basic” and “moderate” plus the following additional activities:</p> <ul style="list-style-type: none"> • A forum of futurists with expertise in the next economy, demographics and social/technical changes • An additional thirty (30) individual interviews (<i>As covered in the context analysis</i>); • An additional 150 hours of “natural conversations” (<i>As covered in the context analysis</i>); • An additional ten (10) neighborhood or school based meetings (<i>As covered in the context analysis</i>) 	1-5

Part 4: Proposed Method for Strategic Choices

Scope	Type and Number of Events	Time Frame (Months)
Basic	<ul style="list-style-type: none"> • Preparation of strategic choices report 1.0, including alt. vision statements • Public distribution of report and web comment • Strategic choices report 2.0 • Meeting with editorial boards • Leadership Summit (up to 100 persons) • Formation of Follow-through body 	4-5
Moderate	<ul style="list-style-type: none"> • Preparation of strategic choices report 1.0, including alt. vision statements • Public distribution of report and web comment • Strategic choices report 2.0 • Meeting with editorial boards • Preparation of local media materials • 9 Sector summits (up to 50 persons each) • Leadership Summit (up to 250 persons) • Formation of Follow-through body 	4-5
Comprehensive	<ul style="list-style-type: none"> • Preparation of strategic choices report 1.0, including alt. vision statements • Public distribution of report and web comment • Strategic choices report 2.0 • Meeting with editorial boards • Preparation of local media materials • Sector summits (up to 50 persons each) • Leadership Summit (up to 3,000 persons) • Formation of Follow-through body 	4-5

Part 4: Proposed Methodology for Action Plans

Scope	Type and Number of Events	Time Frame (Months)
Basic	<ul style="list-style-type: none"> • Preparation of strategic choices summary as to vision, desired results and any identified strategies. • Six (6) workshops with Follow-through body to develop strategic action plan that will include strategy selection, assignments, time-frames, progress indicators and possibilities for resource support. • Development of vision plan management system to keep the plan regularly updated. • Development of pro forma budget or resource analysis needed to maintain the vision effort. • Report and presentation to City Council for Council adoption. 	5-6
Moderate	<p>All of the above plus</p> <ul style="list-style-type: none"> • Individual meetings with Council members prior to presentation to identify any final concerns that the Follow through body needs to address before finalization of the action plan. • Follow-up workshops with the Follow-through body at 6 and 12 month points. 	5-6
Comprehensive	<p>All of the above plus</p> <ul style="list-style-type: none"> • A workshop with City Council (or joint workshop with Council and Follow-through body) at one year post-adoption to review and update. 	5-6

The “basic” project will produce the following deliverables:

- A current conditions report which includes benchmarking information against comparable markets/cities.
- A broad and comprehensive public engagement process.
- A report on relevant stakeholder data organized by core subject/drivers of change highlighting the salient issues, values and concerns raised by community members. This report will be drawn from focus groups, interviews and various community forums.
- A report on opportunities available to the City with comments where relevant on what comparable communities are pursuing.
- A strategic choices report that includes alternative vision statements and positioning options which describe the city in 2035.
- A vision statement accompanied by a positioning statement which describes the city in 2035 as endorsed by a leadership summit of approximately 100 persons
- An action plan which sets direction and provide guidance for each Vision(s) implementation; highlights physical improvements of significance; and proposes necessary governmental policy changes required to facilitate implementation.
- A vision plan management system

The “moderate” project will produce the above deliverables plus:

- Significantly broader public engagement interactions to enrich the current conditions report;
- Data from a scientific survey to enrich the current conditions report
- Additional data for the opportunities report;
- Visual preference survey data to include in the opportunities report;
- 9 sector summits held in preparation for the leadership summit;
- An additional 250 persons who participated in the leadership summit;
- Workshops with the follow through group at 6 and 12 months post plan adoption.

The “comprehensive” project will produce all of the above plus:

- Expanded public engagement including an open space forum which will allow introduction of full range of ideas from the community in a manner which has not yet been provided;
- A futurist forum in experts on the next economy, key demographics and social/technical change will provide information on opportunities the community could consider;
- A leadership summit of up to 3,000 persons
- A one year post adoption Council retreat to update the plan.

The firm was founded in 1987. It began its first vision plan consultation in 1992. Since that time it has regularly completed vision plans for communities.

Tab 4: Years of Experience

Dr. Herbert Marlowe, the principal of Analytica will be the project manager for the project. He has performed this role on each of the vision plans the firm has developed. He also manages all other projects of the firm. His resume was provided in tab 2.

Tab 5: Project Management

Tab 6: Similar Services

City of Round Rock, Texas Vision and Strategic Plan

221 E. Main St., Round Rock, Tx 78664. Jim Nuse, City Manager, 512 281 5401. JNuse@round-rock.tx.us, 2008 to present.

City of Orlando Strategic Plan

400 S. Orange Avenue, Orlando, FL 32801. Beryl Davis, Project Manager. 407 937 1377. BDavis@theiia.org. 2007-8.

City of DeLand Strategic Vision Plan

120 S. Florida Ave, DeLand, FL 32720. Michael Pleuss, City Manager. 386 626 7109. pleussm@deland.org, 1999 to present.

City of Naples Vision Plan

735 8th St. S., Naples, FL 34102. Dr. Bob Lee, Manager, now at Florida State University. 850 645 1341. Relee2@fsu.edu. 2008.

Town of Longboat Key Vision Plan

501 Bay Isles Road, Longboat Key, FL 34228. Bruce St. Denis, Town Manager, 941 316 1955. bstdenis@longboatkey.org. 2008.

Tab 7: Cost of Services

Table 1: Fee Proposal			
Element	Basic	Moderate	Comprehensive
Context Analysis	\$79,615	\$122,335	146185
Opportunity Analysis*	\$17,000	\$49,340	\$66,680
Strategic Choices	\$35,800	\$57,040	\$84,520
Action Plan	\$19,640	\$25,880	\$27,440
Grand Total**	\$152,055	\$254,595	\$324,825
* A number of activities simultaneously address both context and opportunity analysis. The costs are assigned to the context analysis			
** These figures include both fees and expenses.			

Table 2: Fee by Deliverable*			
RFP Deliverable	Basic	Moderate	Comprehensive
Current Conditions	\$33,775	\$43,775	\$53,775
Public Engagement	\$52,840	\$115,400	\$144,090
Stakeholder Data	\$10,000	\$12,500	\$15,000
Vision Action Plan	\$55,440	\$82,920	\$111,960
Grand Total	\$152,055	\$254,595	\$324,825
This table has been provided as requested. However our method produces these deliverables in an integrated manner so that assignments of costs are somewhat arbitrary.			

Appendix A