

Memorandum

Department of Public Works



TO: Michael O. Geisel, P.E.
City Administrator

FROM: James A. Eckrich, PWD/City Eng. *JAE*
Jeannette Kelly, Finance Dir. *JKelly*

DATE: May 11, 2021

Forward to F&A Committee of City
Council for review and direction.

RE: Strategic Planning

MO Geisel 2021-5-11

As you know, for some time the City of Chesterfield has debated whether to implement Strategic Planning. Many of us (including the authors of this memo) argue that Strategic Planning is imperative in order for the City to define its mission and clarify its role in providing services to its residents. Strategic Planning is a process by which the City can set short-term and long-term goals to achieve its mission. Further, Strategic Planning provides a framework to ensure the City's budgets and resources are optimally used to achieve this mission. *Indeed for Employers* defines Strategic Planning as "a process used by organizations to identify their goals, the strategies necessary to accomplish those goals, and the internal performance management system that will be used to monitor and evaluate progress."

It is our belief that a successful Strategic Plan must be facilitated by an external consultant. This ensures that the Plan is not constrained by the thoughts and limitations of those who manage the City every day and is not driven by any specific agenda. Additionally, a successful Strategic Plan must include the following components:

- A review of the City's current goals, priorities, and Mission Statement.
- Development and prioritization of new goals and priorities.
- Revise Mission Statement (if necessary).
- Formulate goals and priorities into a Strategic Plan Report for publication and electronic distribution throughout the community.
- Establishment of measurable objectives to achieve the new goals and priorities.
- Create the framework for regular review and update of the Strategic Plan.

It is vitally important that the Strategic Plan is neither a "feel good session" nor a "document that sits on the shelf." Our vision for the Strategic Plan is that it would be completed over several weeks with multiple meetings between the consultant, the

Mayor and City Council, and City Staff. The consultant would use these meetings to create a report which would contain new goals and priorities for the City supported by specific measurable objectives. The City would then establish teams and responsible parties to achieve those objectives, with some kind of “scoreboard” to demonstrate progress.

This type of process clearly does not lend itself to a low bid analysis. Instead, the City should treat this like it does engineering or architectural services and choose the consultant it believes to be the most qualified to create the Strategic Plan. We propose that a Request for Proposals (RFP) be sent to three to five firms which the City knows provide Strategic Planning services. A team comprised of City Staff and elected officials would then review and score these plans in order to select the firm most qualified to create the Strategic Plan for the City of Chesterfield. Once a consultant is chosen, a scope / schedule / fee would then be negotiated and presented to the full City Council for approval. A draft RFP is attached for your consideration.

While a fee will not be requested as part of the RFP, it is logical that members of City Council would question the likely cost of a Strategic Plan. We believe the cost for a thorough Strategic Plan involving the Mayor, City Council, and City Staff will likely cost \$30,000 to \$40,000.

Should you have questions or need additional information, please contact us. Otherwise, it is our recommendation that the Finance and Administration Committee of City Council consider the issuance of an RFP for Strategic Planning services.

Action Recommended

This matter should be forwarded to the Finance and Administration Committee of City Council. Should the F&A Committee concur with Staff’s recommendation it should authorize the issuance of the attached RFP to 3-5 firms who provide Strategic Planning services. Once the RFPs are received they will be reviewed as detailed in the RFP and a scope / schedule / fee will be submitted to the full City Council for approval at a later date.

Should the F&A Committee elect not to issue the RFP it should advise the City Administrator how to proceed regarding Strategic Planning.



**CITY OF CHESTERFIELD
REQUEST FOR PROPOSALS (RFP)**

- Purpose of RFQ:** The City of Chesterfield requests consulting services to develop a Strategic Plan
- Submittal Requirements:** Six paper copies and one electronic copy
- Due Date & Time:** July 28, 2021 by 2:00 p.m.

Request for Proposals

Strategic Plan Development Consultant Services City of Chesterfield, Missouri

Purpose/Invitation to Submit

The City of Chesterfield requests consultant services to develop a strategic plan. The City does not have a current strategic plan. Specifically, the City is seeking the creation of a multi-year strategic plan to include:

- Review of current City goals, priorities, and Mission Statement
- Development and prioritization of new goals and priorities
- Revise Mission Statement (if necessary)
- Formulate goals and priority into a Strategic Plan Report for publication and electronic distribution through the community
- Establishment of measurable objectives to achieve the new goals and priorities
- Create framework for regular review and update of the Strategic Plan

Context and Scope

The City of Chesterfield, Missouri is a Third Class City located in far western St. Louis County, comprised of approximately 50,000 people. The City of Chesterfield is a regional hub for business and office, containing the national headquarters of companies such as Bayer, Pfizer, MiTek, and the Reinsurance Group of America (RGA). The City of Chesterfield contains a large parks system, including the Chesterfield Valley Athletic Complex located in Chesterfield Valley. The Public Works Department maintains approximately 183 miles of public streets and 260 miles of public sidewalk. It is a safe community, protected by the Internationally Accredited Chesterfield Police Department.

SCOPE OF SERVICES

Consultant teams should familiarize themselves with the City of Chesterfield in order to acquire the necessary data that will support the creation of the Strategic Plan. This should include a review of the City's budget, website, City Policies, and the recently created Comprehensive Plan.

It is expected that the selected consultant will conduct multiple meetings (virtual and/or in-person) with City Council and City Staff over a period of several weeks. Public surveys and community input are not required as part of the creation of the initial Strategic Plan, but may be incorporated into the goals, priorities, and objectives of the plan.

Submittal Requirements

Consultants are asked to submit proposals for this project. This RFP is intentionally loosely structured in order to provide the consultant the discretion to determine the best information to submit in order to be responsive to the RFP. However, please be sure to include the following:

1. General Firm Information: Provide general information about your firm, including name, mailing address, location, phone number, and email address of firm / person submitting the proposal.
2. Related Experience and Past Performance of Firm: Indicate the related and specific experience of your Firm within the past five years in conducting services of similar scope and magnitude for other agencies. Include the name of the client and project, location, scope of work and services provided, date completed, and contact, including email address and phone number.
3. Explain your general approach to strategic planning and particularly how you work with the City elected officials and staff during the project. Emphasize the specialties and strengths of your firm.
4. Provide at least one sample Strategic Planning Report you have completed for another City within the last three years.
5. Personnel Availability and Workload: Provide a brief resume of each key person(s) and/or specialist(s) to be assigned to this project and indicate their current workload and availability to complete this project in a timely and professional manner.
6. Provide a reasonable range of costs and range of scope based upon your expertise with strategic planning in like-sized communities. Actual scope, schedule, and fee will be negotiated between the successful consultant and the City.
7. Explain why your Firm is the Firm the City should choose to create the best Strategic Plan possible for the City of Chesterfield and its residents.

Selection Process

The Request for Proposals (RFP) will be submitted to a select number of firms (3-5) who provide Strategic Planning services. A Selection Committee involving the Mayor, a member of the City Council, the City Administrator, the Director of Finance, and the Director of Public Works will review the Proposals and develop a consensus as to which Proposal best meets the needs of the City of Chesterfield. The consensus will be based upon relevant project experience, statements of availability and interest, project approach, references, and demonstrated competence. Cost will be considered, but will not be a primary decision factor. Once the best proposal is selected and a scope/fee/schedule is negotiated, a contract will be submitted to the full City Council. The full City Council will make the final decision regarding approval of a contract regarding Strategic Planning. The City of Chesterfield reserves to the right to reject all proposals and abandon the pursuit of a Strategic Plan at any time prior to the execution of a contract.

Interviews

The City of Chesterfield may conduct interviews with the firms who submit Proposals. Consultants should be prepared to discuss, among other things, their approach to strategic plan development, availability for the project, and experience with other similar projects.

Questions

Questions should be directed to the following. Note that no question will be answered within 48 hours of the deadline. Email questions are preferred:

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636-537-4764

Jeannette Kelly
Director of Finance
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