TOWN OF ORANGE PARK
FLORIDA
TOWN VISIONING
SEPTEMBER 6, 2019

Submitted by:
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1.0 Cover Letter

September 4, 2019

Courtney Russo, Town Clerk
Town of Orange Park
2042 Park Avenue
Orange Park, FL 32073

RE: RFP-TOP-SVP-2019 Town Visioning

Dear Ms. Russo,

Future iQ is pleased to submit this proposal to provide consulting services to facilitate a strategic vision planning process for the Town of Orange Park.

We understand that strategic vision plans are ‘living documents’ and that this project will require not only alignment with past planning, but a look ahead to the unique aspirations of Orange Park community stakeholders for years to come. Future iQ’s visioning and planning process is not ‘cookie-cutter’, and the Strategic Vision Plan that emerges will balance the Town’s needs to create a strategic vision plan that is grounded in Town-wide priorities that support and build on the Town’s mission, vision and core values for the future.

Future iQ has a proven track record of designing and implementing customized large and small-scale strategic visioning and planning projects across rural, urban and regional areas in North America and Europe. With over 400 workshops performed, we have worked hard with local communities to help establish their priorities through visioning and strategic planning processes. Some of the strengths we believe we bring to this project include:

- **We understand the need for balanced development.** We have worked with many cities, towns, counties and regions at points-in-time when communities have reached generational change, industry tipping points, and other scenarios that involve significant redevelopment phases. For example, our work with the City of Edina in Minnesota involved extensive public engagement with businesses, neighborhood and housing associations, community organizations and individual homeowners as they dealt with issues such as teardowns and rebuilds, re-purposing commercial properties, and higher density zoning issues. Balancing the need for redevelopment as well as the need to
maintain the essential character and charm of a community was crucial in their ‘place-making’ planning process. Future iQ will bring this sensitivity to Orange Park’s strategic visioning process.

- **We specialize in visioning, strategic planning and stakeholder engagement.** Engagement is one of the cornerstones of Future iQ’s strategic planning methodology. Our planning process specializes in applying innovative tools and approaches that bring together community stakeholders to create unique and cohesive strategic visions and plans, and an aligned vision for the future. Importantly, our visioning process provides a collaborative place for participants to share expertise and ideas, and to openly consider various perspectives on issues of concern to their community. We have accomplished facilitators who are well versed in steering community discussions and exploring local sensitivities and aspirations.

- **We bring a future perspective.** Future iQ specializes in studying and understanding larger emergent trends and influences that are re-shaping organizations and communities. We have published foresight research on ‘The Next Industrial Revolution, ‘Cities of the Future’, ‘Economics of Collaboration’, the ‘Future of Food’ and the ‘Future of Manufacturing’. In 2012, we hosted a global Think-Tank forum at Windsor Castle (UK) on ‘Building Sustainable Regional Communities’ and hosted an additional Think-Tank forum there on ‘The Future of Urban Living’ in December 2018. This experience and knowledge helps us shape truly future oriented planning processes. This helps stakeholders anticipate future trends and understand the implications and opportunities they create for organizational planning.

- **We understand the power of good data.** We believe that good engagement processes and data collection, presented in a transparent and interactive manner, can build rapid alignment around key points of consensus. This enables leadership to make key decisions and planning actions that are defensible and supported by stakeholder voices.

Future iQ delivers innovative and customized projects on time and on budget. Our hands-on approach, as well as the effectiveness of our methodology, will help the community stakeholders of Orange Park to maximize the value of the visioning process and achieve realistic actionable outcomes. This will lead to the creation of a strategic vision plan that is unique to the Town of Orange Park and supported by the community.

It would be our privilege to work with the Town of Orange Park on this initiative. Please contact me for clarifications as needed. Thank you for your consideration.

Yours sincerely,

David Beurle
CEO, Future iQ, Inc.
Email: david@future-iq.com
Tel: +1 612 757 9190
2.0 Proposer’s Experience

2.1 Firm Background – About Future iQ

Future iQ is a global consulting and research company specializing in visioning and strategic planning for regions, cities, communities, and industries. Founded in 2003, Future iQ’s global footprint brings a broad perspective and delivers transformational customized solutions to local environments. With seven staff members, four strategic partners and four country representatives, Future iQ’s clients span North America, Europe and Australia. Future iQ works across cultures, sectors and languages to shape unique and effective planning solutions that span regions and sub-regions. The Team assigned to this project has extensive experience in visioning and strategic planning projects in the United States.

Future iQ specializes in the following functional and sector areas:
- City, Urban and Regional Planning
- Operations and Corporate Planning
- Economic and Workforce Development
- Tourism Industry Planning and Analysis
- Non-profit Strategic Planning
- Defense Sector Engagement

Future iQ’s specialized methodology includes:
- Strategic Planning and Visioning
- Stakeholder Engagement
- Network and Supply Chair Mapping
- Data Visualization
- The Future Game
- Customized Foresight Research

For more information, please visit Future iQ’s website at: http://future-iq.com
2.2 Detailed Descriptions of Comparable Projects

Future iQ is currently facilitating strategic visioning and planning for the Cities of Mitchell, in South Dakota, Park City in Utah, Smithville in Missouri, and Trotwood in Ohio. The final documents will be available as soon as they are complete. As requested in the RFP, below are similar projects with government entities along with contact information and their deliverables.

1. **Coppell Vision 2040 and Strategic Plan, Texas (2018-2019)**
   The City of Coppell contracted with Future iQ to develop the Coppell 20Next Plan involving both visioning and a new strategic plan for the City. The project lasted approximately 12 months, and involve da Benchmark Analysis, Think-Tank, extensive community and stakeholder engagement, data collection, analysis and visualization, as well as a strategic plan with a roadmap and key measures for success. [https://future-iq.com/project/coppell-vision-2040-usa-2018/](https://future-iq.com/project/coppell-vision-2040-usa-2018/)

   **Contact:** Traci E. Leach  
   Deputy City Manager  
   225 E. Parkway Blvd., City of Coppell, TX  
   Tel: 972-304-3672  Email: TLeach@coppelltx.gov

   Future iQ was engaged to create a long-term comprehensive community vision and strategic action plan that will guide the community of Hilton Head Island for the next 10-20 years. This project involved extensive community engagement, stakeholder interviews, community surveys, data visualization and analysis, the development of a communications plan and Brand, as well as a strategic roadmap for the vision once created. [http://future-iq.com/project/hilton-head-island-south-carolina-usa-2016-17/](http://future-iq.com/project/hilton-head-island-south-carolina-usa-2016-17/)

   **Contact:** Jennifer Ray, ASLA  
   Planning and Special Projects Manager  
   Town of Hilton Head Island  
   One Town Center Court, Hilton Head Island, SC  
   Tel: 843-341-4665  Email: jenniferr@hiltonheadislandsc.gov


   Future iQ was contracted by the City of Edina to design and facilitate the Vision Edina initiative to develop a scenario-based strategic vision framework for the city’s future. From a strategic planning perspective, Vision Edina examined the challenges and opportunities that were identified as having the highest priority within the community. These included the community’s stated desired features to be inclusive and connected; to maintain a “build-to-scale” development perspective; to pursue sustainable
environment policies; to remain and build its status as being a community of learning; and to be future-oriented in its planning initiatives. The project produced a Benchmark Analysis, Think-Tank Report, Community Engagement Report and a Community Vision Report. Link: http://future-iq.com/projects/vision-edina/

**Nodes and Modes – Bridging Vision to Comprehensive Planning (2017)**
Future iQ was contracted to facilitate the linking of the visioning process to the update of Edina’s 2018 Comprehensive Plan. The first bridging session consisted of a “Big Ideas’ Workshop to gather community thoughts about ideas that express the Nodes and Modes concept into the future design of the city. The second session was a participatory mapping workshop that explored the Nodes and Modes concept as it related to the redevelopment and small area planning in the Comprehensive Plan. Project link: https://future-iq.com/project/nodes-modes-city-edina-usa-2017/

**Contact:** Scott Neal, City Manager
City of Edina
4801 W. 50th Street, Edina, MN 55424
Tel: 952-826-0401 Email: sneal@edinamn.gov

4. **B.E.S.T. of Waseca County, Waseca Vision 2030 and Strategic Action Plan, Minnesota (2017-2018).** In collaboration with the firm of LHB, Future iQ was engaged by the Waseca Business and Entrepreneurial Support Team (B.E.S.T.) to facilitate the development of a common vision, strategic plan and action plan for Waseca County, City and area organizations. The project involved a Benchmark Analysis, communications plan, extensive community engagement and data collection and visualization. The resulting vision, strategic action plan provided cohesion to community action as well as a unified voice for where the community needs to invest its resources. http://future-iq.com/project/waseca-county-minnesota-usa-2017/

**Contact:** Danny Lenz, CFO, Scott County
(former City Manager, City of Waseca)
Government Center
200 Fourth Avenue West, Shakopee, MN 55479
Tel: 952-445-7750 Email: DLenz@co.scott.mn.us

5. **City of Wayzata, Wayzata 2040 Community Vision, Minnesota (2017-2018)**
Future iQ was contracted by the City of Wayzata to develop a new Community Vision that built on its recent Lake Effect project and created clear city-wide priorities for the future. The visioning process involved extensive community engagement and a scenario-based planning methodology that will help the community look forward to the year 2040. The intent was for the resulting vision and priorities to be innovative, inclusive and sustainable and to provide a roadmap to guide and inform Wayzata’s comprehensive planning process. http://future-iq.com/project/city-wayzata-minnesota-usa-2017/
Future iQ was recently engaged by the City of Mitchell to develop a community vision and strategic action plan for the City. The project will involve a public project launch, Benchmark Report, Think-Tank, extensive community and stakeholder engagement, data collection, analysis and visualization, as well as a strategic action plan with a roadmap and key measures for success.  https://future-iq.com/project/city-of-mitchell-south-dakota-usa-2019/

Contact: Stephanie Ellwein, City Administrator
City of Mitchell
612 North Main Street, Mitchell, SD 57301
Tel: 605-995-8143   Email: sellwein@cityofmitchell.org

7. City of Smithville, Vision and Strategic Action Plan, Missouri (2019-present)
Future iQ was recently engaged by the City of Smithville to guide visioning and strategic planning for the City. The process will involve a benchmark report and communications plan, a Think-Tank and Scenarios of the Future Report, extensive community stakeholder engagement, data visualization, and the production of a strategic action plan.  https://future-iq.com/project/city-of-smithville-missouri-usa-2019/

Contact: Cynthia Wagner, City Administrator
City of Smithville
107 W. Main Street, Smithville, MO 64089
Tel: 816-532-3897   Email: cwagner@smithvillemo.org

Future iQ was recently engaged by Park City to develop a community vision and action plan for the City. The project will involve a Background Report, Think-Tank, extensive community and stakeholder engagement, data collection, analysis and visualization, as well as an action plan with a statement of community ideals and core values.  https://future-iq.com/project/park-city-vision-2030-utah-usa-2019/

Contact: Linda Jager, Community Engagement Manager
Park City Municipal Corporation
445 Marsac Avenue, Park City, UT
Tel: 435-615-5189   Email: linda.jager@parkcity.org
9. **Trotwood, Organizational Vision and Strategic Plan, Ohio (2019-present)**

   The City of Trotwood engaged Future iQ to develop the next 5-year organizational strategic plan for the community of Trotwood. The project will include background research, facilitation of a Think-Tank, extensive community engagement, community surveys, Scenarios of the Future Report, focus groups, and strategic action plan with a roadmap with implementation steps. [https://future-iq.com/project/city-of-trotwood-ohio-usa-2019/](https://future-iq.com/project/city-of-trotwood-ohio-usa-2019/)

   **Contact:** Cheryl Wheeler, Assistant to the City Manager  
   City of Trotwood  
   3035 Olive Road, Trotwood, OH 45426  
   Tel: 937-854-7215  
   Email: cwheeler@trotwood.org

2.3 **Relevant Project Experience**

   In addition to Future iQ’s strategic visioning work for municipalities, Future iQ also facilitates such work for nonprofit organizations, corporations, and regions. Below are additional examples of visioning and strategic planning experience. For detailed project descriptions, please see [Attachment A](https://future-iq.com/featured-projects/).

   - City of San Diego, CA, Defense Industry Strategy (2016-present)
   - Tillamook County, OR, Strategic Vision and Action Plan (2018-2019)
   - McHenry County College, Crystal Lake, IL, Strategic Visioning and Foresight (2018)
   - Allen County, OH, Greater Lima Collaborative Growth Plan (2015-2017) - DOD, OEA
   - ECC Medical/Wellness Destination Strategic Marketing Plan, Edina, MN (2018-2019)
   - NH Aerospace and Defense Export Consortium, NH, Strategic Plan (2017-2018)
   - Future of Midwest Agriculture, University of Minnesota (2017 – present)
   - Moosehead Lake Region, ME, Strategic Action Plan (2016-17)
   - Middle Georgia Regional Planning (2018-present) - Department of Defense, OEA
   - Global Think-Tanks at Windsor Castle, U.K. (2012 and December 2018)
   - Oshkosh Regional Planning Initiative, Eastern Wisconsin (2014-2016) – DOD, OEA
   - Snohomish County, WA, Tourism Destination Development, (2017-2018)
   - Travel Oregon, Statewide Regional Tourism Planning (2016-18)
   - Texarkana, TX, Strategic Action Plan (2015) - Department of Defense, OEA
   - Province of Alberta, Canada – Small Business Strategy (2009-2014)
   - North Tyrrhenian Sea-Mediterranean Ports Project, Italy/France (2015-16)
### 3.0 Qualifications of Project Staff

The client-facing Future iQ team members presented in this proposal have significant experience working on visioning and strategic planning projects. We recognize that this project requires significant periods for intensive workloads and our team availability will allow sufficient team resources to be deployed, both on-site and for data analysis and report preparation. The proposed team members are an experienced and reliable team, with a complementary mix of required skills in:

- Highly developed critical thinking capacity in the areas of visioning and strategic planning, organization design, and collaboration building
- Knowledge and experience with municipalities, corporations, regional entities and non-profit organizations
- Detailed practical experience in research, stakeholder engagement, economic and data analysis and data visualization
- Project management and stakeholder workshop facilitation, including extensive experience in visioning, economic and workforce development, industry cluster development, economic analysis and impacts research

All team members are confirmed to be available for the time frames and delivery as outlined in this response and will be directly accountable to Project Director David Beurle, CEO, Future iQ.

Below are the respective roles of team member for this project:

<table>
<thead>
<tr>
<th>Team Member</th>
<th>Title</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>David Beurle</td>
<td>CEO, Future iQ, Inc.</td>
<td>Project Director, Facilitation, Strategy Development</td>
</tr>
<tr>
<td>Heather Branigin</td>
<td>VP, Foresight Research</td>
<td>Research, Strategy Development, Engagement, Writing</td>
</tr>
<tr>
<td>Celine Beurle</td>
<td>COO</td>
<td>Communications</td>
</tr>
<tr>
<td>Walter Paixao-Cortes</td>
<td>Data Engineer</td>
<td>Data Analysis and Visualization</td>
</tr>
<tr>
<td>Tobiloba Adaramati</td>
<td>Data Analyst</td>
<td>Data Analysis</td>
</tr>
</tbody>
</table>
RÉSUMÉ

DAVID BEURLE, B.S.C., AGR
C.E.O. FUTURE IQ

As founder and CEO of Future IQ, David is an expert in creating future planning approaches for use in regional, industry and organizational settings. He has pioneered the application of scenario planning with regions, regional industries and corporations around the world. David created the Future Game, a widely used planning and workshop tool that has been used in over 500 workshops across 10 countries. As CEO of Future IQ, David has led global projects across 4 continents and has written and contributed to a number of foresight papers. Having worked in the field of organizational and regional economic and community planning for over 20 years, his work has won numerous awards. David has a major role in Future IQ’ projects as lead consultant and director of projects.

RECENT PROJECT EXPERIENCE

• Future of Urban Living Think Tank, St Georges House, Windsor Castle, UK, 2018 - 2019
• Middle Georgia Regional Defense Industry Economic Diversification Project 2017 - 2018
• City of Coppell, Texas, Community Visioning 2018 - 2019
• Snohomish County, Washington, Tourism Implementation Plan 2017 - 2018
• Maine Woods, Tourism Impact Study 2017 - 2018
• City of San Diego Defense Industry Economic Development Plan, California, US, 2016 - 2018
• North Coast, Oregon, Tourism Destination Management, 2018 - 2019
• Hilton Head Island, South Carolina, Community Visioning project, 2016 - 2017
• Task Force LIMA Defense Initiative, Ohio, US, 2015 - 2017
• National Congress of American Indians, Future Game development, 2016 - 2018
• City of Wayzata, Minnesota, US, Community Visioning 2017 - 2018
• Moosehead Lake Regional Master Plan, Maine, US, 2016 - 2017
• Edina Economic Development Plan, Minnesota, US, 2016
• Oregon Regional Tourism Planning US, 2015 - 2016
• Columbia River Gorge, Oregon, US, 2015 - 2016

RECENT PUBLICATIONS

• Future of Tourism, 2018
• The Next Industrial Revolution, 2018
• The Future of Midwest Agriculture, 2017 - 2018
• The Future of Manufacturing, 2016
• The Future of Food, 2016
• Economics of Collaboration, 2015
• Cities of the Future, 2015
• Building Sustainable Regional Communities, Windsor Castle, UK, 2012
• The Futures Game: A Scenario game Workshop Package to Engage Future Thinking, 2009
• Development of a Process to Turn Plausible Scenarios into On-Ground Action, 2009
• Travel Oregon, Rural Tourism Studio, Klamath Basin, Oregon, USA (October 2017)
• Future of Midwest Agriculture – 2 day think-tank workshop developing scenarios for the future (June 2017)
• Hilton Head Island, South Carolina - Community visioning think-tank and workshops (June 2017)
• R.K. Mellon Foundation, Pittsburgh, USA - presentation to Board of Trustees (June 2017)
• American Defence Communities Conference - Washington DC, Future of Defence Workforce (June 2017)
• National Association of Workforce Development Professionals, New Orleans, USA (May 2017)
• Aerospace and Aviation Forum – San Diego USA (May 2017)
• Future of Food – International Restaurant Leadership Conference (in collaboration with Griffith Foods), Dubai (October 2016)
• North Tyrrhenian Sea – European Union Port Project, Italy and France (February 2015)
• St George’s House, Windsor Castle, UK - Building Sustainable Regional Communities (2012)

KEYNOTE PRESENTATIONS

• New Mexico Infrastructure Finance Conference, October 2018
• Association of Emergency Manager, Minnesota, September 2018
• Tourism Industry Summit, Snohomish County, Seattle, May 2018
• McHenry County Community College, Future Planning Think Tank, June 2018
• National Association of Development Organizations, Think Tank, La Jolla California, US June 2018
• Scottish International Business Week, Edinburgh, Scotland, Sept 2018
• 22nd Annual Recycling Association of Minnesota (RAM) / Solid Waste Association of North America (SWANA) Conference & Show, Keynote Speaker (October 2017)
• Future of Southern Minnesota, Community Vitality Summits (with Congressman Tim Walz), April 2018
• Aggregate & Ready Mix Association of Minnesota (ARM) Annual Convention, Minneapolis, USA (November 2017)
• National Congress of American Indians – customised Future Game (October 2017)

DAVID BEURLE

david@future-iq.com

EDUCATION

Bachelor Degree in Agricultural Science, University of Sydney, 1984

EMPLOYMENT

Founder and CEO Future IQ, USA and Europe, 2003 - Present

Principal Adviser, Minister for Primary Industries, Western Australia, 1991 – 2000

Rangeland Scientist, Western Australian Department of Agriculture, 1985-1991

PHILANTHROPIC WORK

Board Director, Western Australian Community Foundation, 2003-2005

Founding member, Plant-Based Product Council, USA, 2019

RECENT PROJECT EXPERIENCE

• Future of Urban Living Think Tank, St Georges House, Windsor Castle, UK, 2018-2019
• Middle Georgia Regional Defense Industry Economic Diversification Project 2017 - 2018

DAVID BEURLE, B.S.C., AGR
C.E.O. FUTURE IQ

As founder and CEO of Future IQ, David is an expert in creating future planning approaches for use in regional, industry and organizational settings. He has pioneered the application of scenario planning with regions, regional industries and corporations around the world. David created the Future Game, a widely used planning and workshop tool that has been used in over 500 workshops across 10 countries. As CEO of Future IQ, David has led global projects across 4 continents and has written and contributed to a number of foresight papers. Having worked in the field of organizational and regional economic and community planning for over 20 years, his work has won numerous awards. David has a major role in Future IQ’ projects as lead consultant and director of projects.
3.2  Heather Branigin, Vice President, Foresight Research

HEATHER BRANIGN,  B.A., M.A.T.
VICE PRESIDENT, FORESIGHT RESEARCH
Heather began work with Future IQ in 2015 as primary researcher and author of Future IQ’s foresight publication The Future of Food, and recently co-authored The Next Industrial Revolution and The Future of Tourism. She has extensive experience in local government and the nonprofit sector, and is an accomplished project manager and research analyst. Heather has a well-developed ability to assimilate information into thoughtful and coherent writing. She applies the integration of future trends, data analysis and public engagement into implementable strategy development for clients. Through her work, Heather seeks to provide that critical resourceful guidance needed to empower communities and organizations to make decisions that build sustainability and resiliency as they face a future of accelerations and change. Originally from Canada, Heather has pursued her international interests through her philanthropic work with the United Nations Association of Minnesota.

RECENT PROJECT EXPERIENCE
• City of Mitchell Community Vision and Action Plan, SD, 2019-Present
• Park City Community Vision and Strategic Action Plan, UT, 2019-Present
• Future of Urban Living Global Consultation at Windsor Castle, UK, 2018
• Clearwater Economic Development Association, ID, 2019
• Sustainable Materials Management - Vision for Iowa, Iowa DNR, 2018-Present
• Tillamook County Strategic Vision and Action Plan, OR, 2018-Present
• ECC Medical/Well-Being Strategic Marketing Plan and Economic Development Plan, MN, 2016-2019
• National Association of Development Organizations, Washington, D.C., 2018-2019
• Coppel Vision 2040, Coppel, TX, 2018-2019
• City of San Diego, OEA Grant Facilitation, San Diego, CA, 2016-2019
• Snohomish County Regional Tourism Destination Development, WA, 2018

RELEVANT PUBLICATIONS
• The Future of Tourism-The Maine Woods, FIQ Foresight Report, 2019
• Coppel Vision 2040 Strategic Action Plan, Coppel Community Profile Benchmark Analysis, 2018-2019
• 4 Regional Think-Tank Reports and Building a Sustainable Tourism Industry Report, Snohomish County, WA, 2018
• The Future of Urban Living: FIQ Foresight Report, 2019
• NADO Scenario-Based Think Tank Report, San Diego, CA, 2018
• McHenry County College Scenario Based Foresight Report, IL, 2018
• The Next Industrial Revolution, FIQ Foresight Report, 2018
• NHADEC Strategic Action Plan and Strategic Planning Think Tank Reports, MN, 2017-2018

HEATHER BRANIGN
heather@future-iq.com

RÉSUMÉ

EDUCATION
Master of Arts in Teaching
Secondary Level, Social Studies
University of St. Thomas, MN
Bachelor of Arts in Political Science/International Relations
Advanced Language Certificate: French Literature
Carleton College, MN
Honours Degree, Neuchâtel Jr. College
Neuchâtel, Switzerland

EMPLOYMENT
Vice President, Foresight Research, Future IQ, 2016-present
City of Edina
Edina, MN, 2013-2016
National Collegiate Conference Association - National Model United Nations
Minneapolis, MN, 2010-2013
United Nations Association of Minnesota
St. Paul, MN, 2007-2010

COMMISSION
Notary Public Commission, Exp: January 2024

PHILANTHROPIC WORK
Volunteer Judge, Future City Competition, MN, 2017
Advisory Council Member, United Nations Association of MN, 2014-present
Co-President (2011-2013) and Board Member (2010, 2014), United Nations Association of MN
3.3 Celine Beurle, COO

RÉSUMÉ

Masters Degree in Sociology
University College Cork, 1998
B.A. Hons Degree in Sociology/Philosophy
University College Cork, 1996
B.A. Hons Degree Sociology
University of Warwick, 1995

EDUCATION

C.D.O. Future iQ
USA and Europe, 2012 – Present
Managing Director Future iQ Europe, Ltd
Europe, 2012 – Present
Manager, Govt. Employment Service
Ireland, 2003 – 2012
Animal Welfare Policy Chair
Green Party Ireland, 2003 – 2009

EMPLOYMENT

With an academic background in Sociology and Philosophy, Celine is passionate about understanding society and this has led to her ongoing interest in pursuing societal change. She has drawn upon her research background, to write policy and scientific papers. She was sole Policy writer for a key area, for one of the main political parties in Ireland, and was successful in having it subsequently included in the national policy platform, when the party went into government. With a background in running companies and projects, Celine brings many years of experience in both leading and expanding a company. As Chief Operating Officer of Future iQ, Celine has expanded the geographical reach of the company to encompass South America, Italy, Spain and the United Kingdom. This role also involves working with the CEO on the strategic direction of Future iQ and communications within the company. Celine is also Managing Director of the European branch of Future iQ. She works on projects both in a project management role and with regards to the communication planning of all projects. Celine was project manager for the successful Future of Urban Living consultation that Future iQ held at St George’s House. Windsor Castle in December 2018.

RECENT PROJECT EXPERIENCE

- Tillamook County Strategic Planning, Oregon, USA, 2019
- The Future of Urban Living consultation, Windsor Castle, UK, 2018
- Middle Georgia Charette and Regional Planning Initiative, Georgia, USA, 2018
- Coppell Vision 2040, Texas, USA, 2018
- Hilton Head Island Visioning, South Carolina, US, 2017
- La Laguna Regional Planning, Tenerife, Spain, 2017
- Greater Lima Region, Ohio, US 2016-2017
- Edina Economic Development Plan

RELEVANT PUBLICATIONS

- Vision 2040 Community Engagement Report, 2018
- Middle Georgia Charette and Regional Planning Stakeholder Engagement Report, 2018
- Hilton Head Island - Our Future Think Tank Report, 2018
- Hilton Head Island - Our Future Stakeholder Engagement Report, 2018
- Vision 2040 Think Tank Report, 2018
- Middle Georgia Charette and Regional Planning Think Tank Report, 2018
- The Next Industrial Revolution, 2017
- Future iQ Project Communication Plan - Framework and Approach, 2017

RELEVANT PUBLICATIONS

- Greater Lima Region Stakeholder Ecosystem Analysis, 2017
- Economic Development in Edina Stakeholder Analysis, 2017
- Griffith Foods Stakeholder Analysis Report, 2017
- An Exploration of Focus Group Methodology, 2016
- The Future of Food, 2016
- Agriparco Montespertoli Scenario Planning Report, 2014

CELINE BEURLE

celine@future-iq.com
9.4 Walter Paixao-Cortes, Data Engineer

WALTER R. PAIXÃO-CÔRTES, MA, BA
DATA ENGINEER, FUTURE IQ

Walter is a senior software engineer with 24 years of experience in the software development industry, working across different domains including Human Resources, Finance and Product Engineering. He has expertise in data analysis, creating ETL pipelines, building data visualizations in many different technologies (SAP Business Objects, Oracle BI Enterprise Edition, QlikView and Tableau), and has experience in working with high data volumes to extract insights. Walter has an academic background in Computer Science with a Masters in Bioinformatics, and a Doctorate (in progress) in Bioinformatics with a minor in Natural Language Processing.

RECENT PROJECT EXPERIENCE
- Snohomish County Regional Tourism Destination Development, WA. 2018
- McHenry County College, Crystal Lake, IL. 2018
- Middle Georgia Charrette and Regional Planning, Georgia. 2018
- Coppell Vision 2040, Coppell, Texas. 2018
- Rural Community Assistance Partnership, Washington D.C. 2018
- Wayzata Community Vision, Wayzata, MN. 2017-2018
- Hilton Head Island Our Future, South Carolina. 2017-2018

WALTER R. PAIXÃO-CÔRTES
walter@future-iq.com

EDUCATION
Doctorate in Computer Science (Bioinformatics/Natural Language Processing)
Pontifical Catholic University of Rio Grande do Sul, 2015 to present
Masters Degree in Computer Science (Bioinformatics)
Pontifical Catholic University of Rio Grande do Sul 2013 – 2015
Bachelors Degree in Computer Science
Pontifical Catholic University of Rio Grande do Sul, 1995 – 2002

EMPLOYMENT
Data Engineer – Future IQ (2017 – present)
Senior Software Engineer – Dell Computers, Brazil (2000 – present)
Software Engineer - Accenture, Brazil (2003 – 2006)
3.5 Tobiloba Adaramati, Data Analyst

RÉSUMÉ

Tobiloba Adaramati is a mathematician who sees the beauty in data. She is an expert in data processing, opinion mining, sentiment and reputation analysis. Through her unique perspective, Tobiloba sees each data point as a unique part of a puzzle which put together correctly, creates a clear picture. She uses various forms of data to provide valuable insights and reveal underlying trends. Her background includes a first-class degree in mathematics and experience providing monitoring and evaluation services for international development programs. Tobiloba has worked with Future iQ since 2017, providing data and analytics expertise.

EDUCATION

B.Tech. (First Class) Degree in Mathematics Education
Federal University of Technology, Minna, 2015

N.C.E Degree in Computer and Mathematics
Federal College of Education (Technical), Akoka, 2011

EMPLOYMENT

Data Analyst. Future iQ
USA and Europe, 2017 – Present

Results Measurement Expert. JMSF
Agribusiness, Nigeria, 2018 – Present

CEO. Growth Analytics Consulting
Nigeria, 2017 – Present

Monitoring and Evaluation Analyst.
Solina Group, Nigeria, 2016 – 2017

Research Analyst. Solina Group
Nigeria, 2015 – 2016

TOBILOBA ADARAMATI, B. TECH. (EDU).
DATA ANALYST

TOBILOBA ADARAMATI
	tobiloba@future-iq.com

RECENT PROJECT EXPERIENCE

- Coppell Vision 2040 Project, Texas, US, 2018
- Wayzata 2040, Sailing Ahead, Minnesota, US, 2017

RELEVANT PUBLICATIONS

- Wayzata Benchmark Analysis Report, 2017

TOBILOBA ADARAMATI
	tobiloba@future-iq.com
4.0 Work Plan

The proposed project plan is implemented in four phases that build momentum around an aligned strategic vision and initiatives for the Town of Orange Park over the next 5, 12 and 20 years. The Strategic Vision Plan 2040 is intended to be comprehensive, inclusive and implementable. It will identify future opportunities and align resources for development throughout the Town. The activities and deliverables outlined in Section 4 Scope of Work in RFP-TOP-SVP-2019 will be included in the proposed scope of work and incorporated into the four phases outlined below.

Proposed Project Plan

**September 2019**

**PHASE 1**
Initial Planning and Background Research
- Initial planning, meetings and schedule
- Background research/key data review including budgets and CIP
- Assessment of current capabilities/needs
- Begin Benchmark Report (optional)

**PHASE 2**
Future Scenarios and Engagement
- Think-Tank surveys on stakeholder views
- Orange Park Future Think-Tank Workshop
- Scenarios of the Future Report
- Visioning sessions, workshops and community events
- Community survey, data collection and analysis
- Data visualization platform

**PHASE 3**
Recommendations and Plan Framework
- Complete Benchmark Report (optional)
- Think-Tank Reconvene to develop recommendations and strategic goals
- Focus groups to develop strategic action steps
- Complete data collection and analysis
- Economic development map
- Development products
- Draft Strategic Vision Plan 2040 framework

**PHASE 4**
Town of Orange Park Strategic Vision Plan 2040
- Finalize Town of Orange Park Strategic Vision Plan 2040
- Presentation of the Town of Orange Park Strategic Vision Plan 2040

**May 2020**
4.1 Phase 1: Initial Planning and Background Research

This project will begin with meetings between Future iQ team members and Town leadership to establish a final work program and schedule specifying the number and type of planned meetings, engagement activities and deliverables to occur throughout the project. Significant background research including exploration of existing Town documents will be undertaken to understand those strategic directions already established and to identify progress made towards meeting those objectives. As specified in the RFP, deliverable 2 will be included in this review phase and will include a thorough review of current and past budgets and Capital Improvement Plans (CIP).

The initial research of phase 1 will seek to gain a thorough understanding of Orange Park’s organizational structure and operations, as well as a formal assessment and analysis of capabilities and facilities within the Town boundary. Concurrent with the capabilities and needs assessments, Future iQ also recommends adding a Benchmark report to the project’s scope of work. The Benchmark Report would expand on the assessments by providing an up-to-date community profile in conjunction with nationwide community comparisons across common dimensions. The preliminary information from the reviews, assessments and Benchmark Report, along with input from Town leadership and the project Steering Committee will be used to develop the Think-Tank survey that will be distributed to all community stakeholders participating in the Orange Park Future Think-Tank (Section 4.2).

Future iQ will also work closely with the Town to develop clear communications involving content and messaging for the duration of the project, timing of communications, and recommendations on communications initiatives such as flyers, invitations and community outreach pieces. It is our firm belief that consistent and easily accessible project communications add to the transparency of the process and encourage active participation.

**Deliverables** from Phase 1 will include:
- Initial planning, meetings and schedule
- Background research and key data review including budgets and CIP
- Assessment of current capabilities/needs
- Benchmark report (optional)
4.2 Phase 2: Future Scenarios and Engagement

Future iQ specializes in studying and understanding larger emergent trends and influences that are reshaping cities, communities, organizations and regions. This future-oriented lens guides Phase Two as it creates the building blocks of a preferred vision of the future using a scenario-based visioning methodology. Using trend research, local knowledge and expectations about Orange Park, this methodology will enable community stakeholders to explore the impacts and consequences of a range of different future paths as they participate in a Think-Tank.

The scenario-planning process creates scenarios that are not predictions but are a way of exploring plausible futures. Key aspects and features of the approach include:

- It is customizable and built around the project plan.
- It is data and evidence-based, ensuring a robust outcome, and a vision and plan that deals with reality, rather than a ‘wish-list.’
- Community stakeholder engagement is front and center in the design, and stakeholders will have the option to have input via multiple methods.
- The process is inclusive, easily scalable and can draw input from all segments of the Town.

There are several important design principles to the proposed visioning approach, including:

- **Strong collaborative and inclusive people-focused approach.** The long-term success of this project will be dependent on building strong collaboration among the Town’s various stakeholders. The development of this type of ‘eco-system’ needs to be built in upfront in the planning stages of the project with a conscious effort to build on points of consensus to create a common vision for Orange Park.
- **Future oriented.** Building a Town-wide shared vision will be critical for Orange Park. In order to develop an agreed-upon vision action plan, stakeholders will need clarity and a common understanding of the drivers impacting the Town.
- **Data driven approach, including data visualization.** Our experience suggests that projects like this are most successful when built on transparent data-driven approaches, inclusive of as many community stakeholders as possible.
- **Project management and communication strategy.** Building the systems and communication methods to ensure compliance and timely delivery are important features of our project management.
Below is the visual outline of how Future iQ’s scenario-based visioning process works.

**How a Think-Tank Works**

The Think-Tank process helps to define a broad vision, goals and directions. It is conducted as a highly participatory 4 to 8-hour workshop (sometimes held over two evenings) that produces a preferred future scenario validated by the completion of individual participant ‘Heat Maps’. The Heat Map results will be incorporated into Orange Park’s community vision, revealing consensus on a preferred future or vision for the Town. For Orange Park, the scenario based Future Think-Tank is a tool to gain better understanding of community stakeholder priorities and goals to create effective actions for Town resource allocation. This process helps community stakeholders explore and understand emergent trends, and their potential implications across Orange Park. A range of plausible future scenarios are developed that act as a testing ground to assess resilience and consequences.

For Orange Park, we believe this process is trying to answer important questions such as:

- What should Orange Park become?
- What makes Orange Park unique and special and how can the Town use these characteristics to prepare for the future?
- How will community stakeholder preferences fit into this vision?
- How should funds be invested and leveraged to build resiliency for the Town?
In addition, the Think-Tank process can further examine circumstances including:

- What are the specific strategic gap and growth areas for Orange Park and does previous planning address those areas?
- How may financial/budgetary issues on the State level impact Orange Park and how can the Town prepare for potential budget challenges?
- Where does Orange Park fit into the world, and what are its unique competitive strengths?
- How does Orange Park anticipate and take advantage of emerging trends in the economy, Country, and aspirations of community stakeholders?
- What unique hurdles might Orange Park face, and how do we build collaborative approaches and structures to ensure continued successful programs and services?
- Where is there opportunity or need to evolve or change? Where is there an appetite for change, and where might there be resistance to change?
- What is the story Orange Park community stakeholders want to tell about themselves and what do they want the Town to be in the future?

The methodology being proposed is more in-depth than a SWOT analysis and will allow community stakeholders to tackle these questions in an engaging and thought-provoking manner. This will then lead to the clarification of priorities and core values that will define the Strategic Vision for Orange Park.

**Community Engagement**

Engagement is a cornerstone of Future iQ’s strategic planning methodology. Key to effective community engagement is building momentum and excitement around the Vision as it is created. Future iQ uses a wide variety of engagement methods to build this momentum – from Think-Tanks, targeted workshops, interviews, focus groups, summits and surveys that reach all corners of the community. Future iQ goes deep and wide to gather input, making a specific effort to engage those community members that typically are not engaged in civic or community dialogue.

For this project, it will be especially important to obtain input from key representatives and leaders from across the community. We will conduct visioning sessions and workshops, attend community events and promote the online community survey to broaden the reach and solicit feedback. The scope and various means of this engagement will be developed in close consultation with Town Staff at the start of the project.
Data Visualization is Key to Understanding Town Stakeholders

Data collection from surveys provides an inclusive process and a comprehensive understanding of stakeholder views and where points of consensus lie. Future iQ recommends using our online Lab Portal, to collect and display Orange Park community stakeholder survey results. Please see http://lab.future-iq.com. This approach provides a fun and interactive way to give transparent feedback to participants while at the same time exploring issues and views across the Town. The Lab also serves as a central location where stakeholders can go to find updated project information and notices.

Future iQ developed the Lab Portal platform to provide a people-focused, data-driven approach to strategic planning and key issue analysis. The following image shows an example of the ‘point of consensus’ in a sample project. The dots represent groups of stakeholders and where their preferred future was located relative to a range of choices within the scenario matrix. The point of consensus will move depending on the search filters selected, allowing for an engaging and interesting way to explore the various views of different cohorts and groups within the Town. For Orange Park, we would set filters based on profile questions such as age, length of time living or working in the Town, industry affiliation, etc.

Deliverables from Phase 2 include:
- Think-Tank survey on stakeholder views
- Orange Park Future Think-Tank Workshop
- Scenarios of the Future Report
- Visioning sessions, workshops and community events
- Community survey, data collection and analysis
- Data visualization platform

4.3 Phase 3: Recommendations and Plan Framework

Phase three will develop the nuts and bolts of the strategic vision plan. Following the public visioning sessions, Future iQ will reconvene the original Think-Tank group. This reconvened group will revisit the first Think-Tank and completed Benchmark Report and incorporate the results from the surveys and visioning sessions to validate engagement results and develop recommendations and strategic goals for the vision plan. This workshop serves to foster cohesion and alignment by giving participants the opportunity to validate the final vision, strategic direction and findings for Orange Park’s Strategic Vision Plan. This support will be very important to facilitate resource and Town-wide alignment.

Following the Think-Tank Reconvene, Future iQ recommends focus groups to further build out the strategic action steps for the vision plan. For this project, it will be especially important to
obtain input from the key actors in relevant agencies; State and local economic development, and industry leaders. For example, targeted focus groups would explore input in specific economic development areas such as neighborhood nodes and small area plans. Future iQ’s specific work in “Nodes and Modes” is highlighted in a recent project in Edina, MN, an inner-ring suburb of Minneapolis. These two workshop/focus group sessions explored how to bring reality to the City’s community vision by bridging the strategic pillar of “Nodes and Modes” to its upcoming Comprehensive planning phase through the use of Small Area planning.

As specified in the RFP, phase 3 will see the development of an economic development map as well as various forms of development products. The specifics of these development products will be established in the initial planning phase of this project.

**Measuring Effectiveness**

Understanding and measuring progress will be an important part of implementing the Orange Park Strategic Vision Plan. Used correctly, performance metrics provide a powerful feedback loop to understanding the effectiveness of resource development strategies and investment in programs and in identifying emerging gaps. In developing metrics, it is important to measure progress using a comparison over time. By comparing progress of the action steps at different points in time, the metrics will give an indication of the trajectory of that step.

**Deliverables** for Phase 3 include:
- Complete Benchmark Report (optional)
- Think-Tank Reconvene to develop recommendations and strategic goals
- Focus groups to develop action steps (optional)
- Complete data collection and analysis
- Economic development map
- Development products
- Draft Vision and Strategic Action Plan framework
4.4 Phase 4: Town of Orange Park Strategic Vision Plan 2040

Future iQ’s final steps in the strategic planning process incorporate the accumulated input on the plan framework from elected officials, Town administration and staff, the Steering Committee, and community stakeholders into the final draft of the Strategic Vision Plan 2040. Future iQ will use this opportunity to work with Orange Park staff to align implementation with the strategic vision and plan for fiscal sustainability by developing realistic, achievable goals. This would include considerations for the next planning process. The final Town of Orange Park Strategic Vision Plan 2040 will be presented by the Project Director to the Orange Park Town Council and community stakeholders as determined at the initial planning meetings.

**Deliverables for Phase 4 include:**
- Final draft of the Orange Park Strategic Vision Plan 2040
- Presentation of the Orange Park Strategic Vision Plan 2040
4.5 Proposed Methodological Approach

Future iQ brings a global perspective to strategic visioning that is invaluable to local interests. For the Town of Orange Park, this means access to a wealth of knowledge and experience in the development of economic and strategic planning for cities, counties, regions, nonprofits and global corporations. Future iQ will use this experience to guide and inform this project and will work with Town leadership to develop comprehensive, future-oriented, sustainable and implementable recommendations and goals to support the new Town of Orange Park Strategic Vision Plan. These strategies will balance priorities across the important dimensions specific to the Town of Orange Park and incorporate global and local best practices.

Future iQ’s strategic planning methodology is based on three primary principles. It is Future Oriented, Data Driven and People Focused. The ‘future orientation’ is particularly important to take account of rapidly emerging technological trends. The ‘data driven’ ensures the plan is built on solid research and information. The ‘people focused’ is important to build support for the Vision and goals for the Town, and to harness the best possible input into the strategic vision plan formulation.
4.5.1 Future Oriented Research

Future iQ produces global foresight publications and research to help our clients build understanding about important future trends impacting cities, counties, regions, communities and industries. This insight helps stakeholders to effectively plan for the future. During this project, Future iQ will draw from our research to present customized trend analysis and information most relevant to Orange Park. This will help Town leadership, staff, Steering Committee and community members explore new thinking and ideas, and critically examine emerging challenges and opportunities.

Cities of the Future (2015)
Explores trends that have the potential for widespread adoption over the next two decades.

Future of Tourism (2018)
Explores emerging trends impacting outdoor and recreation-based tourism industries.

Future of Manufacturing (2016)
Analyzes and provides insights on the key trends that are impacting the global manufacturing sector.

The Next Industrial Revolution (2018)
Explores the broad implications and impacts of an emerging world of accelerating digital technology, robotics and automation.

Future of Midwest Agriculture (2017)
Explores future trends and plausible scenarios for Midwest agricultural industries, economies and communities. Key trends include technological disruption, emergence of global forces and the importance of sustainability.

Global Think-Tank – Windsor Castle (2012 and 2018)
In partnership with St. George’s house, Windsor Castle, Future iQ explored the challenges of building sustainable communities (2012) and the future of urban living (2018).

The Future of Food (2016)
Examines a range of critical catalysts of change relating to the global food supply chain, and the potential impact upon human health, the environment and food security.
4.5.2 People Focused Engagement

Future iQ’s people-focused engagement process facilitates real conversations that get to the heart of the matter and builds consensus. From large-scale participatory industry forums to targeted focus groups, interviews and online survey mechanisms, Future iQ’s wide range of engagement methods encourage people to be part of the decision-making, visioning and planning process. This hands-on engagement will be a very important feature of the proposed engagement aspects of this project.

Think-Tank – Scenario Planning
The Think-Tank is an innovative approach to stakeholder engagement. It focuses on scenario-based strategic planning and stresses the role of future-thinking to identify shared interests and common concerns.

Community and Stakeholder Outreach
Throughout the planning process Future iQ engages a broad cross section of stakeholder cohorts using meaningful and inclusive engagement methods.

Large Scale Stakeholder Sessions
Large scale groups build momentum and stakeholder and ecosystem enthusiasm for the planning process.

Focus Groups and Planning Workshops
Targeted focus group sessions and customized vision workshops deliver invaluable qualitative and quantitative stakeholder engagement insights.

Simulation Learning

Future Game®
The Future Game is a planning simulation tool provides stakeholders with a dynamic gaming experience rewarding collaboration, innovation, and teamwork.
4.5.3 Data Driven Methodology

Future iQ specializes in sophisticated data collection and analysis. Using our innovative Future iQ Lab Portal, survey data collected from a wide range of cohorts will be presented in a way that allows Orange Park community members to see how their personal input helps shape the overall vision and planning.

**Stakeholder Surveys**

Comprehensive stakeholder data, presented in a transparent and interactive manner, can help build rapid alignment around key points of consensus. This enables organizational leadership to make decisions and planning actions that are defensible and supported by the voices of all stakeholders.

**Best Practices Benchmarking**

Multi-dimensional benchmark analyses of cohort communities provide valuable insight to clients.

**Data Visualization**

Survey results will be collected and presented in an innovative and interactive data visualization platform. This will allow stakeholders to examine the data collected from surveys themselves, explore levels of alignment or divergence around key topics, and selectively filter to view perspectives from their own sector, or other profile category.

**Lab Portal**

A customized Lab Portal gives clients a centralized location for project information, engagement dates, reports, and survey result data visualization.

**Data Insights**

Key data insights and analysis throughout the visioning process provide clients a glimpse into community sentiment and priorities.

**Future Insight**

Future insight and trend analysis during strategy development give clients the opportunity to consider the impacts and implications of future trends on current local planning.
### 4.6 Proposed Project Timeline

Work on key deliverables will occur in parallel allowing the stages to be completed within the project timeline.

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<th>Key Phases</th>
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<td><strong>Phase 1:</strong> Initial Planning and Background Research</td>
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<td><strong>Phase 2:</strong> Future Scenarios and Engagement</td>
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<td>Orange Park Future Think-Tank Workshop</td>
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### 5.0 Cost

Future iQ operates on an all-inclusive, fixed-price delivery. The fees below include all travel and accommodation costs and overheads for the Project Director and staff. Future iQ assumes that the Town of Orange Park will provide venues for engagement sessions and presentations, as required. Please note that **Future iQ’s fees and project plan are flexible and easily scalable** depending on the needs of Orange Park.

<table>
<thead>
<tr>
<th>Key Phases</th>
<th>Key Components</th>
<th>Base Costs</th>
<th>Added Options</th>
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</thead>
</table>
| **Phase 1:** Initial Planning and Background Research | • Initial planning, meetings, and schedule  
• Background research/key data review including budgets and CIP  
• Assessment of current capabilities/needs  
• Begin Benchmark Report (optional) | $1,000  
$2,000  
$2,000  
$2,500 | |
| **Phase 2:** Future Scenarios and Engagement | • Think-Tank surveys on stakeholder views  
• Orange Park Future Think-Tank  
• Scenarios of the Future Report  
• Complete Benchmark Report (optional)  
• Visioning sessions, workshops and community events  
• Community survey, data collection and analysis  
• Data visualization platform | $2,000  
$8,000  
$5,000  
$16,000  
$3,000  
$4,000 | $2,500 |
| **Phase 3:** Recommendations and Plan Framework | • Think-Tank Reconvene to develop recommendations and strategic goals  
• Focus groups to develop strategic action steps (optional)  
• Complete data collection and analysis  
• Economic development map  
• Development products  
• Draft Strategic Vision Plan 2040 | $6,000  
$6,000  
$4,000  
$1,000  
$3,000  
$16,000 | |
| **Phase 4:** Town of Orange Park Strategic Vision Plan 2040 | • Finalize Orange Park Strategic Vision Plan 2040  
• Presentation of the Town of Orange Park Strategic Vision Plan 2040 | $5,000  
$2,000 | |
| **Total Fees & Expenses** | FIXED PRICE PROPOSAL | **$80,000** | **$91,000** |

**Proposed payment schedule:**
- 20% on signing of contract, 20% at completion of phases 1, 2, 3 and 4
### 6.0 References

Below are six recent similar project contacts that may be used as references for this project. All are aware that they may be contacted as references for Future iQ. Additional references may be provided as needed.

<table>
<thead>
<tr>
<th>Project</th>
<th>Contact Information</th>
</tr>
</thead>
</table>
| **Coppell Vision 2040 and Strategic Action Plan, Texas (2018-2019)** | Traci E. Leach  
Deputy City Manager  
225 E. Parkway Blvd.  
City of Coppell, TX  
Tel: 972-304-3672  
Email: TLeach@coppelltx.gov |
| **City of Edina, Vision Edina (2014-2015); Nodes and Modes, Minnesota (2017)** | Scott Neal, City Manager  
City of Edina  
4801 W. 50th Street  
Edina, MN 55424  
Tel: 952-826-0401  
Email: sneal@edinamn.gov |
| **Town of Hilton Head Island, Community Vision and Strategic Action Plan, South Carolina (2016-2018)** | Jennifer Ray, ASLA  
Planning and Special Projects Manager  
Town of Hilton Head Island  
One Town Center Court, Hilton Head Island, SC  
Tel: 843-341-4665  
Email: jennifer@hiltonheadislandsc.gov |
| **Wayzata 2040 Community Vision and Strategic Action Plan, Minnesota (2017-2018)** | Jeffrey Dahl, City Manager  
City of Wayzata  
600 Rice Street East  
Wayzata, MN 55391  
Tel: 952-404-5300  
Email: jdaahl@wayzata.org |
| **Waseca Vision 2030, Strategic Action Plan, Minnesota (2017-2018)** | Danny Lenz, CFO, Scott County  
(former City Manager, City of Waseca)  
Government Center  
200 Fourth Avenue West, Shakopee, MN 55479  
Tel: 952-445-7750 (general switchboard)  
Email: DLenz@co.scott.mn.us |
National Association of Development Organizations  
400 N. Capitol Street, NW, Ste. 388  
Washington, D.C. 20001  
Tel: 202-624-8813  
Email: jmckinney@nado.org |
7.0  Required Forms

7.1  Drug Free Workplace Form

CERTIFICATION OF DRUG-FREE WORKPLACE PROGRAM

I certify that the firm of Future iQ maintains a drug-free workplace program, and that the following conditions are complied with:

1. A statement is published by our firm which notifies employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.

2. Employees are informed about the dangers of drug abuse in the workplace, the company's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.

3. Each employee engaged in providing the commodities or contractual services that are under bid is given a copy of the statement specified in subsection 1.

4. In the statement specified in subsection 1, employees are notified that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.

5. A sanction is imposed on or, it is required that there is satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community by any employee who is so convicted.

6. A good faith effort is made to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

Signature

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7.2 Public Entity Crimes Sworn Statement

PUBLIC ENTITY CRIMES
SWORN STATEMENT PURSUANT TO SECTION 287.133(3) (a), FLORIDA STATUTES

1. This sworn statement is submitted with Bid, Proposal or Contract number Top-SVP-2019 for Town Visioning. This sworn statement is submitted by Future IQ, whose business address is PO Box 24687, Minneapolis, MN 55424, and if applicable, its Federal Employer Identification Number is 87-1829416.

2. 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, or material misrepresentation.

3. 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 or guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non-jury trial, or entry of a plea of guilty or nolo contendere.

4. I understand that an "affiliate" as defined in Paragraph 287.133(1) (a), Florida Statutes, means:
   a. A predecessor or successor of a person convicted of a public entity crime; or
   b. 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 a 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.

5. I understand that a "person" as defined in Paragraph 287.133(1) (e), 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.

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

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

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

   ______ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the 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. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administration Hearing and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted list. (Please attach a copy of the final order).

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND, THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES, FOR CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

Signature

State of Minnesota
County of Hennepin

Sworn to and subscribed before me this 30 day of Aug. 2019
Personally known ___________________________
or produced identification _______________________
(Type of identification) Passport
Notary Public - State of Minnesota
My Commission expires 1/31/2024

Heather A. Branigin (#31062112)
(Printed, typed or stamped commissioned name of notary public)
FORM PUR 7068 (REV. 6/1/12)
8.0 Miscellaneous

8.1 Attachment A: Additional Detailed Project Descriptions

Following are the detailed project descriptions from Related Experience in Section 2.3.

- **City of San Diego, CA – Department of Defense Economic Planning Project (2016-present)**  
  Future iQ has been contracted by the City of San Diego, as part of a Department of Defense, Office of Economic Adjustment funded project. The Future iQ work includes network mapping, economic data collection and analysis, scenario planning and visioning, stakeholder engagement and the delivery of Diversification Plans to facilitate the defense sector workforce adjustment and retraining.  

- **Tillamook County, OR, Strategic Vision and Action Plan (2018-2019).** Future iQ was contracted to lead the county in the development of a strategic vision for how to manage tourism from a facilities perspective. The goal was to develop evaluation criteria that will inform tourism-related facility investments and guide grant program investments with the purpose of applying resources to identified priority projects that support the overall Strategic Vision. The project involved a situational analysis, Think-Tank, stakeholder engagement and data analysis resulting in a Strategic Vision and Action Plan.  

- **State of Vermont, New England Regional Defense Industry Collaboration (2019-present).** Future iQ has been contracted by the State of Vermont to facilitate OEA grant program management and regional collaboration for the six New England states that make up the New England Collaborative. This project will involve background research and interviews of key stakeholders, the Collaborative Future Think-Tank, identifying and building linkages and partnerships within New England defense clusters, network mapping, sustainability planning, governance support, advocacy, and event travel on behalf of the Collaborative. Project publications will include a Scenarios of the Future Report, a Strategic Action Plan, and Board of Directors’ governance documents.  

- **McHenry County College, IL, Strategic Visioning and Foresight (2018).** McHenry County College is embarking on an examination of the county ecosystem to help inform the College as it prepares for an internal strategic planning effort. Future iQ was engaged to provide strategic visioning and planning guidance that will position the College as a ‘thought-leader’ in the community and produced a strategic foresight document that would examine future evolution in the County.  

- **Allen County, OH, Regional Collaborative Growth Plan (2015 and 2016-2017).** Future iQ was contracted to design and lead the US Department of Defense, Office of Economic Adjustment funded Phases 1 and 2 of this project. The project involved scenario planning and stakeholder engagement, detailed network mapping, a regional asset inventory,
customized research and extensive organizational facilitation and a strategic action plan for the County. Phase 2 also included a comprehensive gap analysis of the region, an analysis of local product innovation opportunities and needs, detailed economic and workforce planning and modeling, collaborative action planning, stakeholder engagement and updated network mapping. The project produced a regional collaborative growth plan. 
http://future-iq.com/project/greater-lima-region-2016/

- **National Association of Development Associations, Washington, D.C. (2018).** Future iQ was engaged to provide strategic visioning and planning guidance that will serve to strengthen and build existing nationwide capacity of the organization as well as provide a roadmap to new opportunities for growth in the future. The new Strategic Plan aims to drive organization-wide consensus on collaborative strategic initiatives that will guide decision-making for NADO and the NADO Research Foundation for the next five years. 

- **Edina Chamber of Commerce Medical/Wellness Destination Strategic Marketing Plan, Edina, MN (2018-2019).** Future iQ was engaged to support the Edina Chamber of Commerce’s strategic plan development by creating a roadmap to develop an innovative, vibrant, regional medical/wellbeing destination in Edina. The project involved significant research on centers of excellence, innovation hub potential, and educational opportunities for the community. The resulting roadmap produced recommendations for implementation of the destination strategic marketing plan. 

- **Clearwater Economic Development Association, ID, Visioning and Economic Development Leadership Training (2019).** Future iQ was contracted to provide economic development training services through a program funded by the USDA Rural Community Development Initiative. The intent of the project is to increase recipient capacity for preserving community assets and to increase community wealth through a set of sound economic development principles and effective comprehensive planning and development. 

- **New Hampshire Aerospace and Defense Export Consortium, NH (2017-2018).** Future iQ was contracted by the State of New Hampshire to develop a five-year strategic action plan for the New Hampshire Aerospace and Defense Export Consortium (NHADEC). Funding was provided by the Department of Defense, Office of Economic Adjustment. The work included scenario planning and visioning, stakeholder engagement and the production of a long-term strategic document that details and prioritizes opportunities and challenges that affect NHADEC’s interests and capabilities. 

- **Community Action Partnership of Hennepin County, MN (2017).** Future iQ was contracted to lead the development of a comprehensive organizational Strategic Plan to establish services, programs and partnerships to address poverty and increase family and economic stability within Hennepin County communities. The project involved scenario planning and stakeholder engagement, research analysis and the production of an Implementation Action Plan as part of the final Strategic Plan. 
• **Future of Midwest Agriculture, University of Minnesota, MN (2016-present).** Future iQ is working on a collaborative research project with the University of Minnesota to explore the ‘Future of Midwest Agriculture’, including the sustainable intensification of Midwest agriculture through the use of scenario planning. Anticipated outcomes include a more in-depth understanding of plausible futures for U.S. Midwest agriculture and how the role of these narratives promote cooperation and innovation in the industry, as well as the development of a broad vision and strategic plan for a new agricultural bioeconomy in the Midwest.  

• **Moosehead Lake Regional Master Plan, Maine (2016-2017).** Future iQ was engaged to create a comprehensive regional master plan for the Moosehead Lake region of Maine. The project involves asset mapping of the region’s physical, financial and political capital to inform recommendations for regional land use and infrastructural improvements. This project focused on workforce development, economic diversification, recreational tourism development, guiding visitor flow patterns and building a year-round tourism economy.  

• **Middle Georgia Regional Planning, GA (2018-2019).** Future iQ was contracted by the Georgia Department of Economic Development (GDEcD) to produce an innovative strategic roadmap and regional Plan for Action that will be used by Middle Georgia communities and companies in the region to guide and inform leadership and stakeholders of the array of development opportunities available to them. The project included extensive community engagement, charrettes, network mapping, data collection and visualization and the production of a final report.  

• **Global Think-Tanks at Windsor Castle, U.K. (2012 and December 2018).** In 2012, Future iQ hosted a global Think-Tank forum at Windsor Castle on ‘Building Sustainable Regional Communities.’ The event explored a series of key questions critical to building the future of regional economies and communities. Future iQ hosted an additional global Think-Tank at Windsor Castle in December 2018 to explore ‘The Future of Urban Living’. Global experts from gathered at the 2018 Think-Tank to discuss and debate future trend and impacts on urban living worldwide.  

• **Oshkosh Regional Planning Initiative, Wisconsin (2014-16).** Future iQ was contracted to design and lead a 5-county regional planning effort as part of the economic and workforce diversification and response strategy, funded by the US Department of Defense, Office of Economic Adjustment. This region is home to Oshkosh Corporation, a major defense contractor, and supports a strong manufacturing sector.  

• **Snohomish County, WA, Sustainable Tourism Development and Visioning (2017-2018).** Future iQ was contracted to conduct the first and second phases of this project. Building off the 2018-2022 Snohomish Strategic Tourism Plan, Future iQ performed background research, including online regional industry participant surveys to gauge perceptions about the future of tourism in each region, areas of opportunity and threat, changes occurring and the appetite for change and sensitivity to a range of future shaping trends. The project involved extensive community engagement, benchmarking, four regional Think-Tanks,
production of sustainable tourism visions and reports for each regional area, as well as a combined report that supports the County’s sustainable destination development program. [http://future-iq.com/project/snohomish-county-regional-destination-development-washington-usa/](http://future-iq.com/project/snohomish-county-regional-destination-development-washington-usa/)

- **Travel Oregon, Oregon (2009-present).** Travel Oregon embarked on a regional tourism planning process and has contracted with Future iQ to assist with the development of a regional tourism planning framework, connecting regional plans together and linking them to the overall Travel Oregon strategic plan. This included stakeholder planning and visioning sessions in all 7 major regions across Oregon. The results of this project produced a strategic vision and action plan for each region in relation to the overall planning framework. [http://future-iq.com/project/oregon-regional-tourism-planning-usa/](http://future-iq.com/project/oregon-regional-tourism-planning-usa/)

- **Maine Woods Tourism Development, ME (2017-2018).** Future iQ worked with a consortium of organizations to explore the tourism and economic development potential in the Maine Woods area. This project covers most of Maine, and includes 7 regional areas, primarily to the west of the coastline. The work included exploration of the potential economic impacts of tourism, and research on important emergent trends shaping outdoor and recreation tourism sectors. [http://future-iq.com/project/maine-woods-usa-2018/](http://future-iq.com/project/maine-woods-usa-2018/)

- **Texarkana, Texas (2015).** Precipitated by concerns regarding workforce alignment and the future of the Red River Army Depot (RRAD), Future iQ was contracted by Workforce Solutions Northeast Texas to develop a Strategic Implementation Plan, and help move the process from strategy to action with accompanying recommendations. The process resulted in a strategic implementation plan focused on workforce retention and economic growth for the region surrounding RRAD. [http://future-iq.com/project/texarkana-defense-project-texas-usa/](http://future-iq.com/project/texarkana-defense-project-texas-usa/)


- **North Tyrrhenian Sea Mediterranean Ports Project, Italy/France (2015).** Future iQ was contracted to implement a future oriented scenario-planning methodology with broad cross-sectional representatives from various port cities within four large sub-regions producing individual planning reports for each region. The four studies were compiled in a Joint Analysis Report and presented as part of the Strategic Plan of the port cities of the North Tyrrhenian Sea. [http://future-iq.com/project/mediterranean-sea-ports-project/](http://future-iq.com/project/mediterranean-sea-ports-project/)

- **Edina Chamber of Commerce Economic Development Strategy, Minnesota (2016-2017).** Future iQ was engaged by the Edina Chamber of Commerce to develop a new economic development strategy that it could use over the next ten years. This research produced a complete economic profile and industry cluster analysis of Edina, a stakeholder engagement analysis, and a recommended economic development strategy and implementation plan covering the next 1, 5 and 10 years. [http://future-iq.com/project/economic-development-plan-edina-minnesota/](http://future-iq.com/project/economic-development-plan-edina-minnesota/)
8.2 Attachment B: Proposed Additional Recommended Work

Future iQ recommends adding two items to the scope of work for this project: Benchmark Report, and focus groups to provide added reach to engagement efforts and strategy development. The Benchmark report is a valuable tool for Town boards and administrators. It contains comparison data to similar communities across the United States and highlights best practices used by these communities. The pricing of the additional recommended work has been reflected in the budget as ‘added options’.

To see samples of Future iQ’s benchmark reports, please see the following project pages with attached reports:

Coppell, TX:  https://future-iq.com/project/coppell-vision-2040-usa-2018/

Edina, MN:  https://future-iq.com/project/vision-edina/

Hilton Head Island:  https://future-iq.com/project/hilton-head-island-south-carolina-usa-2016-17/

