

Presentation of Professional Qualifications for Strategic Planning



RAPP CONSULTING GROUP



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August 30, 2021

Jack Linehan
Assistant Village Administrator
Village of Gurnee
Strategic Planning Initiative
324 N. O'Plaine Road
Gurnee, IL 60031

RE: Presentation of Professional Qualifications

Dear Mr. Linehan,

The attached statement of professional qualifications of the Rapp Consulting Group is submitted for your consideration.

The submittal specifically addresses the elements outlined in the Request for Qualifications issued August 2, 2021:

1. Professional qualifications
2. Experience with developing a strategic plan at a municipal level
3. Experience working with governmental organizations and community groups in workshop settings
4. Ability to analyze, organize and present data
5. Overall cost

In addition to the list above we have included a proposed approach to the project.

We look forward to assisting the Village of Gurnee with this important endeavor.

Yours truly,

Craig R. Rapp
President

Professional Qualifications

The Rapp Consulting Group, and its principal, Craig Rapp, has conducted over 100 local government strategic planning engagements, with more than forty (40) occurring in the past five years. The primary clients are cities, counties, and special districts located in the Upper Midwest. Mr. Rapp also performed significant consulting and strategy work when he was employed as Director of Consulting for the International City-County Management Association (ICMA), and Vice President of Springsted, Inc.

PROJECT TEAM

Craig Rapp, President, Rapp Consulting Group

Craig Rapp will serve as the principal in charge for this project. He is a nationally recognized speaker, facilitator, and strategic advisor. He speaks and conducts workshops on subjects such as: leading in difficult political environments, alternative service delivery, and authentic leadership. The focus of his consulting practice is strategic planning, leadership development, and optimizing organizational performance. Craig has forty years of experience as a senior executive in both the public and private sectors. He was the Director of Consulting for the International City-County Management Association, City Manager in three cities, senior director for a regional agency, and a senior executive in two privately held companies. He has a master’s degree in public administration, a bachelor’s degree in urban studies, and is a graduate of the Senior Executive Institute at the University of Virginia.

Cory Poris-Plasch, Consultant -Vice President, Strategic Initiatives, POLCO

Cory Poris Plasch will be assisting Craig Rapp with this project. She is the Vice President, Client Development for Polco and has previously served in leadership positions including Executive Director of the Wisconsin City/County Management Association and Membership Director for the Alliance for Innovation. As a former 911 Dispatcher, she has a heart for public service and her experience includes working in the City Manager’s Office in Illinois communities. She has spoken around the country on topics including the use of data, civic engagement, engaging hard-to-reach populations, and innovation in local government. Cory has helped numerous local governments and other public-sector organizations find success in better engaging their communities so that all stakeholders (including communities of color and other hard-to-reach populations) are included, driving positive change. She has a master’s degree in public administration from Northern Illinois University.

Experience with Strategic Planning - List of Professional References

The clients served by the Rapp Consulting Group are primarily, but not exclusively, suburban cities, counties and special districts. The following are examples of strategic planning projects comparable to the Village of Gurnee:

Recent Strategic Planning Engagements—Comparable Scope

1. Village of Glen Ellyn, IL (pop. 28,000), Mark Franz, Village Manager, mfranz@glenellyn.org, (630) 547-5200
2. Village of Lombard, IL (pop. 43,165), Scott Niehaus, Village Manager, niehaus@villageoflombard.org, (630) 620-5700
3. Village of Roselle, IL (pop. 22, 763), Jason Bielawski, Village Administrator, jbzielawski@roselle.il.us, (630) 671-2808
4. Village of Lemont, IL (pop. 22, 492), George Schafer, Village Administrator, gschafer@lemont.il.us, (630) 257-1590
5. City of Shakopee, MN (pop. 41,000), Bill Reynolds, City Administrator, BReynolds@ShakopeeMN.gov, (952) 233-9311
6. City of Blaine, MN (pop. 64,500), Michelle Wolfe, City Manager, mwolfe@blainemn.gov, (763) 785-6121
7. City of Chanhassen, MN (pop. 22,952), Laurie Hokkanen, City Manager, lhokkanen@ci.chanhassen.mn.us, (952) 227-1119
8. City of Northfield, MN, (pop. 21,000), Ben Martig, City Administrator, ben.martig@ci.northfield.mn.us, (507) 645-3009
9. Lisle-Woodridge Fire District, IL, Keith Krestan, Fire Chief, kkrestan@lwfd.org, (630) 353-3051

Others similar in scope:

Village of Oswego, IL (pop. 31,000); Village of Libertyville, IL (pop. 21,000); Village of New Lenox, IL (pop. 27,000); City of Wheaton, IL (pop. 53,000); Village of Antioch, IL (pop. 14,622); City of Bloomington, MN (pop. 89,987); City of Roseville, MN (pop. 36,000); City of Maplewood, MN (pop. 41,000); City of Brooklyn Park, MN, (pop. 86,478); City of Edina, MN (pop. 47,941); Village of Wauconda, IL (pop. 13,603); Village of Shorewood, IL (pop. 15, 615); Roselle Park District; City of White Bear Lake, MN (pop. 26,000)

Experience working with community groups in workshop settings

The Rapp Consulting Group has extensive experience with community engagement and facilitating workshops with local government. Every strategic planning project includes facilitated sessions with elected and appointed officials, and many include extensive community engagement, including focus groups, community forums, surveys and joint meetings between interest groups. Below is a representative sample of recent projects with significant engagement:

1. ENVISION ROSELLE (Community Visioning Project-2019/20) Village of Roselle, IL (pop. 22, 763), Jason Bielawski, Village Administrator, jbilawski@roselle.il.us, (630) 671-2808
 - a. Focus groups, Community Forum, Community Survey
2. ENVISION LAKEVILLE (Community Visioning Project- 2013, update 2018) City of Lakeville, MN (pop. 69,490), Justin Miller, City Administrator, jmiller@lakevillemn.gov, (952) 985-4401
 - a. Focus groups, Community Forums, Community Surveys
3. STRATEGIC PLAN (2018 & 2021), City of Northfield, MN (pop. 21,000), Ben Martig, City Administrator, ben.martig@ci.northfield.mn.us, (507) 645-3009
 - a. Focus groups, Community Forum, Community Surveys (English & Spanish), Boards & Commission joint meetings, survey
4. STRATEGIC PLAN (2018) Roselle Park District, Lynn McAteer, Executive Director, lmcateer@rparks.org, (630) 200-2167
 - a. Focus groups, Survey
5. STRATEGIC PLAN (2015 & 2019) Lisle-Woodridge Fire Department, Keith Krestan, Fire Chief, kkrestan@lwfd.org, (630) 353-3051
 - a. Focus groups, Survey
6. STRATEGIC PLAN (2018) Oswego Public Library District, Sarah Skilton, Executive Director, sskilton@oswego.lib.il.us, (630) 978-1506
 - a. Focus groups, Survey

Ability to analyze, organize and present data

The Rapp Consulting Group has broad experience with strategic planning, organizational studies, and community visioning projects that incorporate detailed analyses of data, presented in concise, easily understood reports. The implementation of actionable plans clearly written is central to the Rapp Consulting Group approach. Below are links to a wide range of plans and reports:

Examples of Implementation:

Examples of strategic plans, environmental scans, performance reports, and organizational studies are at the following link: <https://bit.ly/3kl5O1>

Rapp Consulting Group's business partner Envisio© offers technology to manage strategic plans and report results. An example of how Envisio's software and dashboard solutions are being used by a Rapp Consulting group client City at the following link:

City of Maplewood, MN <https://www.youtube.com/watch?v=48vqbpOpNyo>

Envisio©

<https://envisio.com>

The Rapp Consulting Group also has a business alliance with **POLCO©** -who offers comprehensive community engagement services, including the National Citizens Survey. www.POLCO.us

Proposed Approach to the Process – Overall Cost

The following is the proposed approach for the Village of Gurnee strategic planning process.

**Meetings are depicted as in-person sessions. At present, it is presumed many meetings will be virtual and subject to pandemic public assembly restrictions. If they are held virtually, the number, and length of meetings may be modified.*

Project Plan

Proposed Timeline*

STEP	LENGTH OF TIME	ACTIVITIES
Project Initiation	30-60 days	Project planning, document review, interviews, leadership session
Environmental Scan/Engagement	75-90 days (overlaps previous)	Environmental scan / stakeholder engagement; Internal SWOT/Value Proposition
Data review/ preparation	21 days	Synthesis of scan and stakeholder data
Strategic planning	30 days	Strategic planning sessions (data review session + retreat)
Strategy implementation	30-45 days	Staff sessions-initiatives, action plans-system
Summary report	21 days	Report preparation
Updates (6, 12, 18 mos.)	7-14 days each period	Consultant-staff review

*Timeline shown is dependent upon availability of internal and external participants, timely access to information, and whether community engagement is pursued

Strategic Plan Development

The following process is proposed for development of the Village of Gurnee strategic plan:

Project Initiation with Elected Officials, Senior Management Team, Staff

The consultant will meet with the Project Manager to establish a schedule for document review and interviews with internal stakeholders. Consultants will review relevant operational and long-range planning documents to gain insight into themes and current priorities of the Village. Interviews with elected officials and senior management will be conducted. Interviews will be done via phone/virtual online but could include online surveys.

A project review meeting will follow with senior leadership. The meeting’s purpose will be to: (1) verify expected outcomes; (2) review mission, vision and values to determine the need for updating; (3) discuss & guide staff on environmental scanning and organizational profile; (4) Review issues-including interview results.

This meeting will also be used to set project schedules and finalize the communication protocols.

Activities include:

- a) Set timelines and formats for environmental scan/organizational profile
- b) Discuss communication of interview results
- c) Prepare for external stakeholder engagement

Assess the Operating Environment

The next step in the strategic planning process is a review of the operating environment. This will be accomplished in three ways: (1) through an Environmental Scan- a systematic review of major environmental factors that affect the Village's operating environment; (2) development of an Organizational Profile-a document that provides the details regarding human and capital resources; and (3) a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis.

The environmental scan and organizational profile will be presented to the Board prior to the first strategy session, and the SWOT analysis will be processed at the first strategy session.

Activity #1 – Conduct Environmental Scan

Under the guidance of the consultant, staff will develop an environmental scan. An environmental scan is a systematic review of major environmental factors that affect the organization's operating environment such as: financial and economic conditions, demographics, physical assets, intergovernmental relations, citizen/stakeholder issues, technology changes, environmental sustainability and the regulatory environment.

- a) Develop and distribute environmental scan documents
- b) Provide staff support as required

Activity #2 – Develop Organizational Profile

An organizational profile is a baseline description of the organization and is prepared by staff with the guidance of the consultant. It provides detailed information regarding the human and capital resources of the organization and the strategic context for its operations. Specifics regarding governance, organizational structure, work processes, staff capacity and capabilities, and the strategic environment are included. This serves as a key reference document for the governing body and leadership team. **This can be combined with the environmental scan as a single document for reporting and distribution purposes.*

- a) Prepare and distribute guides/examples
- b) Provide staff support, review as required

Activity #3 – Administer SWOT Questionnaire

A SWOT questionnaire will be administered to all strategic planning participants. This will provide information regarding the current operating environment-both internal and external. The results will be aggregated to ensure anonymity and maximize candor. The data generated will be used at the first strategic planning session.

- a) Prepare and distribute questionnaire
- b) Provide staff support as required

Engage the Community and External Stakeholders

Conducted concurrently with environmental scanning, this effort seeks to uncover community needs and expectations, and determine whether the Village's mission, vision, values, and priorities are aligned with external stakeholders. The final elements and specific format for this effort will be determined by the Village with the project team and will **at minimum include focus groups** but may include facilitated sessions or online interactions with stakeholder groups.

Stakeholders will be defined by the leadership team, but generally include groups such as: the business community, seniors, athletic associations, faith groups, and schools. The approach for gathering community input include:

- Focus groups—facilitated and conducted by the consulting team—up to 6 key stakeholder groups identified by the Village. Sessions consist of 10-12 individuals from each of the selected stakeholder groups.

***OPTIONAL ENGAGEMENT APPROACHES**

- Community forum(s)—large, facilitated community discussions conducted by the consulting team using audience participation technology (APT). This is a process whereby participants vote anonymously via electronic keypads, responding to questions relevant to the strategic planning process. Participation is open to the entire community and/or by invitation as determined by the Village.
- Online survey of stakeholders—this could be focused on stakeholder groups or the entire community. Administered by the consultants using POLCO© technology. This offers the entire community, or all the members of specific groups the opportunity to contribute their opinions. This could also be used to target a specific group(s) such as advisory boards or community leaders.

Activities associated with stakeholder engagement:

- a) Discuss options with Village and project team
- b) Prepare background materials
- c) Conduct process with selected approaches
- d) Summarize results

Determine Challenges, Priorities, Outcomes, Targets

Once the assessment of the operating environment is complete, the leadership group begins the process of developing the plan, starting with a review of the information and feedback collected, followed by a retreat where strategic challenges are identified and priorities, desired outcomes and performance targets are determined:

Strategic Planning Session #1- Review Stakeholder Feedback, Scan, Profile

This session is held prior to the strategic planning “working sessions” (session 2, 3) and is dedicated to reviewing the operating environment via the results of the stakeholder outreach, the environmental scan, and the organizational profile. The consultant will present the outreach results and the staff will present the scan and profile. The session will conclude with a brief facilitated discussion amongst the Board regarding issues raised.

- a) Prepare and summarize data
- b) Present to Board
- c) Facilitate discussion

Strategic Planning Session #2- Examine Operating Environment, Identify Strategic Priorities

This session will include the Board and leadership team and will focus on reviewing or confirming organizational purpose, examining the operating environment, and establishing priorities. The group will discuss organizational value proposition, review the Village’s mission, vision, and values, and will update them as necessary. A facilitated process involving the Board and leadership team will yield a list of organizational challenges and a set of 4-6 strategic priorities. The group’s effort will be informed by the results of the community engagement process and the information generated by the scan, profile and SWOT questionnaire.

- a) Review and integrate data collection, environmental scan, profile, SWOT information
- b) Facilitate session and group exercises
- c) Summarize results

Strategic Planning Session #3 –Establish Desired Outcomes, Key Indicators, Performance Targets

This session is dedicated to defining a set of Desired Outcomes, Key Outcome Indicators, and Performance Targets used to establish accountability for achieving results in priority areas. It may also address issues not completed at the previous session. Using a facilitated process, the Board and leadership team will take the strategic priorities established in Session #2 and align outcomes and targets with the priorities.

- a) Prepare background materials
- b) Review previous session discussion/results
- c) Facilitate session
- d) Summarize results

Operationalize into a Work Plan

Following the development of a plan that delineates specific outcomes and performance targets, the next steps move the process into plan implementation. Management from many levels will develop strategic initiatives-projects and programs—that will enable the Village to achieve the targeted performance. This will be followed by creation of action plans, which are the detailed steps required to make the initiatives real. To ensure accountability and transparency, the actions will be tracked and reported on a regular basis. This may be done via a staff-developed reporting process or via a software solution—to be determined by the Village:

Strategic Plan Implementation—Develop Strategic Initiatives/Action Plans

This session will be conducted with the management staff across the organization. The session will focus exclusively on developing strategic initiatives and detailed action plans for each strategic priority, in line with the Desired Outcomes and Targets. Action plans need to be developed in sufficient detail to establish accountability and make the effort real. The session will include a review of the strategic planning process to provide guidance on the development of effective plans. If appropriate, it will also include initial exposure to the interface with implementation/dashboard software, which will extend the length of the session and result in follow-up sessions.

- a) Meeting/discussion with Project Manager
- b) Prepare background materials
- c) Facilitate session
- d) Summarize results

Strategic Plan Implementation- Work Plan refinement and integration

This session will be conducted with the management staff at multiple levels and will focus on refining the work of the previous session in order to get integration of efforts across service areas and to understand the software used to coordinate and report performance—if appropriate. It will include training on the interface with implementation/dashboard software, if chosen. Performance reporting will be presented along with forms and/or software solutions.

- a) Meeting/discussion with Project Manager
- b) Review previous session discussion/results
- c) Prepare background materials
- d) Facilitate session/train employees
- e) Summarize results

Final Report

Summary Report

A summary report, detailing the process, including the draft action plan developed, will be prepared and submitted to the City.

- a) Prepare summary report

Plan Updates, Continuation

At the 6-, 12-, and 18-month marks following initial plan adoption, the consultant will work with the Village to review and update the plan. This will involve a review of accomplishments, as well as refinements to targets and outcomes based upon new realities.

- a) Review and feedback on strategic plan results
- b) Prepare background materials
- c) Summarize results

Overall Cost

PROJECT COST* : \$26,450.00* through final report. Updates at 6, 12, and 18 months below

Plan Updates: Requires additional information for accurate cost. Based upon scope provided estimate **\$2,500.00**

(includes focus groups, but no other community engagement—options identified below)

- Community forum(s)— develop questions, coordinate with Village staff and facilitate community discussions. Arrange for audience participation technology (APT). Summarize results. **\$3,500+ / session** (APT -often free—if contracted: **\$1,500-3,000.00**)
- Online survey of stakeholders—develop questions, coordinate with Village staff for promotion and channels, administer survey, coordinate with POLCO, summarize results. **\$2,750.00**

*Total cost including incidentals