

PROPOSAL

PROPOSAL FOR THE:

City of Coppell

IN RESPONSE TO RFP #213 FOR:

**Facilitation Services
Vision 2040 Strategic
Plan Five-Year Check-In**

SUBMITTED BY:

Berry, Dunn, McNeil & Parker, LLC

Seth Hedstrom, Project Principal

Berry, Dunn, McNeil & Parker, LLC
shedstrom@berrydunn.com

Karen Whichard, Project Manager/Lead Facilitator

Berry, Dunn, McNeil & Parker, LLC
karen.whichard@berrydunn.com

Proposals due:

January 28, 2025 before 10 a.m.

January 28, 2025

City of Coppell
c/o Procurement Services
255 Parkway Boulevard
Coppell, Texas 75019

Dear Members of the Coppell Selection Committee:

On behalf of BerryDunn, I am pleased to submit this proposal in response to the City of Coppell's (the City's) request for proposals (RFP) Number 213 for Facilitation Services for the Vision 2040 Strategic Plan Five-Year Check-In. We have read the City's request and reviewed its terms, conditions, and the contents presented therein. Our proposal is a firm and irrevocable offer valid for 90 days from the proposal due date of January 28, 2025.

As the City will learn more about on the following pages, BerryDunn is a nationally recognized professional services firm, headquartered in Portland, Maine, with 10 office locations. We are focused on inspiring organizations to transform and innovate and have lived our core values and preserved our reputation for excellence throughout our 51-year history. Our firm's culture is centered on a deep understanding of our clients' commitment to serving the public. We proudly tailor each of our projects to recognize the work our clients do every day. We care about what we do, and we care about the people impacted by our work—including those at the City and in the Coppell community.

As further described in key sections of our proposal, we possess several attributes that other proposers would be troubled to match:



Creative and innovative facilitators, offering a multifaceted approach to meet people where they are



Firsthand insights gained through our local presence and regionally relevant experience



Consensus-building methodologies that promote buy-in and progress toward a shared vision



Subject matter experts (SMEs) with local government expertise that understand cities at all levels

We are confident that if BerryDunn is chosen to partner with the City on this important initiative, Coppell will have the clarity and insight needed to help ensure its Vision 2040 Strategic Plan continues to reflect the community's priorities in the future. We appreciate the opportunity to propose, and the time and consideration taken by the City to review our submission.

As a principal and leader in our Local Government Practice Group, I can attest to the accuracy of our materials, and I am legally authorized to bind, negotiate, make presentations on behalf of, and commit our firm and our resources. If you have any questions regarding our proposal or updates on the evaluation process, please consider me your primary point of contact and feel free to contact me directly.

Sincerely,



Seth Hedstrom, PMP®, LSSGB, Principal
Berry, Dunn, McNeil & Parker, LLC
t: 207.541.2212 | e: shedstrom@berrydunn.com

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Section 1: Background on Firm

BerryDunn was formed in 1974, currently with 73 principals, 37 owners, and 10 office locations. We have experienced sustained growth throughout our 51-year history. We employ more than 935 staff members—including more than 335 in our Consulting Services Team. From extensive project experience for more than 650 state, local, and quasi-governmental agencies, our team brings valuable perspectives to every engagement. Additionally, our team has experience serving state and local government agencies, providing them with an in-depth understanding of government operations, staffing needs, budgetary constraints, and the business processes required to provide necessary services to the internal divisions and the constituents the City serves.

Our firm provides a full range of professional services—including organizational development, technology planning, business process improvement, cost of service and financial analysis, community services planning, and more—supporting our ability to complete the requested tasks.

With organizational development as a core tenant of our work, we are pleased to offer the following services to benefit the City:

- Strategic planning
- Community/stakeholder engagement
- Performance measurement
- Leadership development
- Executive coaching
- Organizational change management
- Organizational assessment
- Business process improvement

BerryDunn's Local Government Practice Group is organized into seven specialized practices focused on **enterprise organizational development**; enterprise digital transformation; community development and utility operations; parks, recreation, and libraries; technology management; health and community services; and justice and public safety. We provide unparalleled expertise and unique insights across these practices, supporting our clients in solving some of their biggest challenges, addressing opportunities to improve and plan, and carefully considering how our projects impact the organization at the enterprise and departmental levels.

OUR MISSION
OUR VALUES

Living Our Mission and Encompassing Our Values

Together, we commit the best in us to empower the meaningful growth of our people, clients, and communities.

**Integrity
Authenticity
Curiosity
Collaboration
Harmony**

As stated in our mission to the left, our clients and their communities inspire us to be the best we can be. We bring the expertise and passion of our team members to inspire meaningful outcomes for organizations like Coppell. It is critical that the City's partner for this check-in matches its energy in working with the Coppell community and fostering an environment of inclusivity, collaboration, communication, unity, transparency, and forward-thinking. It is in this environment that we will live our mission and encompass our values to educate and inform the community of strategic progress made to date and gain an honest and clear picture of what actions may be needed to continue to prioritize community needs in the future.

BerryDunn's core values, also shared to the left, influence and guide how we conduct ourselves and represent our clients every day. What the City reads is exactly who the City will get to know. We approach each project with honesty and objectivity and serve only in our clients and their communities' best interests at all times. We also firmly believe that authenticity breeds authenticity, meaning our genuineness encourages those we engage to feel comfortable sharing and expressing their true thoughts, insights, and perspectives. The information-gathering methods we leverage and the thought-provoking questions we ask emphasize our strong desire to learn from participants and help them recognize the strong impact their input makes in projects such as this. It is clear that the City views the 2040 Vision Strategic Plan as a way to make shared progress toward Coppell's future. As such, our proven consensus-building methodologies serve as a perfect complement to this work effort, encouraging broad participation and creating a sense of harmony among the City's diversity stakeholders and stakeholder groups.

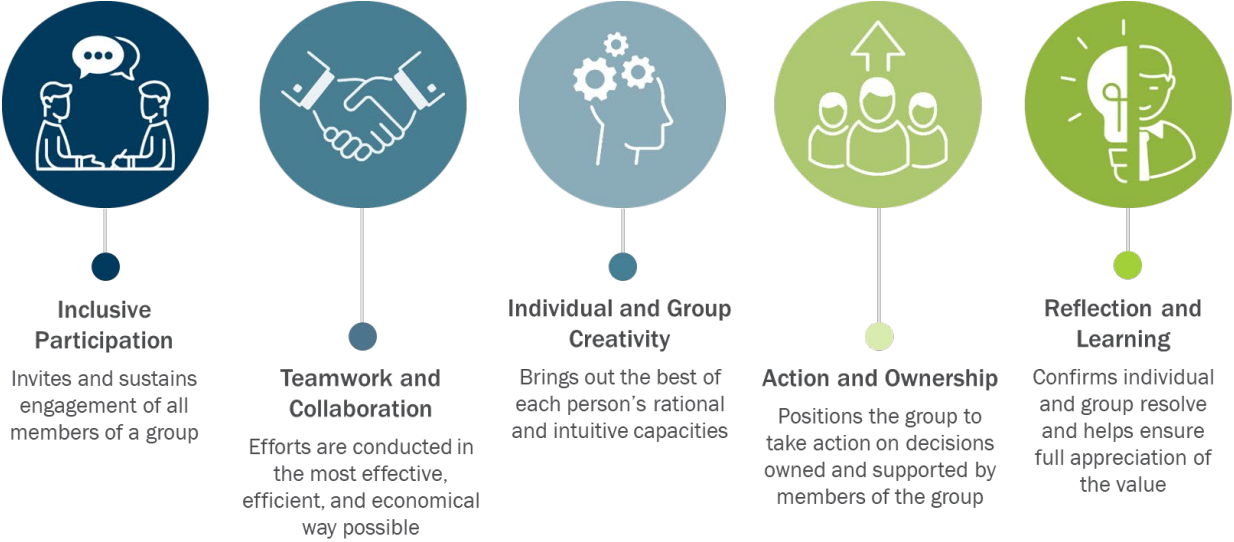
Offering a fresh perspective and industry-leading engagement methods, we are confident that we can not only build upon the City's previous efforts, but also enhance how the City plans for its next iteration in achieving the strategic progress it desires. It would be an honor and a privilege to help the City reach new heights.

Section 2: Project Approach/Proposal

Guiding Methodologies and Work Plan

Our project team will engage the City’s various stakeholders in ways that will maximize creativity and innovation and inspire collaboration and consensus for achieving its vision. It is our goal to facilitate a 2040 Vision Strategic Plan Five-Year Check-In that encourages broad participation from the Coppell community and elicits perceptions and impressions from residents as they relate to where progress deviates from their true needs and may not reflect the community’s vision and priorities.

We understand the importance of obtaining meaningful and actionable input and feedback. As such, we will design and conduct a well-facilitated process that uses the Institute of Cultural Affairs (ICA) Technology of Participation® (ToP®) facilitation methodology to help ensure the City’s resident participation process is highly collaborative and inclusive of all stakeholders. The ToP® methodology emphasizes structured participation that pulls information into the group’s thinking process and creates a clear intention, helping members of the group align with one another and reach consensus. Structured participation encourages:



BerryDunn’s approach also considers how efforts like these must align with the engagement needs of traditionally underrepresented and hard-to-reach stakeholders, a reflection of BerryDunn’s commitment to diversity, equity, inclusion, belonging, and access. We will work with the City—as well as existing resources—to help ensure its work effort is conducted through an equity lens and effectively reaches all parts of the Coppell community. With the City serving as a backbone organization, we will engage current partners to facilitate an authentic, inclusive, and accessible check-in process.

We have found great success in this collaborative approach to assembling the ideal team. To provide a few examples: After being selected to lead the **City of Wausau, Wisconsin**, in the development of their strategic plan, the City connected us with a local member of the Hmong community to provide valuable perspective and considerations in the process. Additionally, in our work with the **City of San José, California**, we worked closely with a Latino community organization. This organization hosted meetings with the community and invited us to facilitate the conversation. This partnership allowed us to create a space that community members felt safe and comfortable in and gain insights and ideas about how to make their community a better place. BerryDunn provided a translator/facilitator in facilitating this discussion to eliminate barriers to participation.

With the City, we understand that its traditionally difficult-to-engage community segments include Asian, Indian, and youth/young adult demographic cohorts. We will employ similar strategies to engage these communities, leveraging existing partnerships to build trust and comfortability, creative venues and activities to gather input and encourage participation, and multilingual options to remove potential barriers to participate.

Engagement activities will include:

- Interviews and focus groups to hear perspectives firsthand in individual and small group settings
- Meeting-in-a-box to allow designated groups to have the tools and resources necessary to facilitate their own strategic plan progress input process
- Community meetings and pop-up events to meet participants where they are and in a space where significant attendance is expected
- Social Pinpoint, to provide virtual engagement options and a hub for sharing updates; this tool has several features that we use frequently and as needed throughout related projects, such as forums, mapping, an ideas wall, and surveys, and it is also mobile friendly and has Google Translate interface

BerryDunn strives to be flexible when it comes to development and execution of an effective work plan. We understand that no two projects are exactly alike and believe that **one of the primary reasons we have been successful with similar projects is our willingness to be flexible in adapting to our clients' unique needs.** Our proposed work plan is described in full details on the following pages.



Explore the features of Social Pinpoint [here](#), a customized site recently developed for Port Arthur, Texas

Phase 1: Project Initiation and Management

Setting the foundation for the work effort through early planning and information-gathering activities, as well as progress reporting structure and cadence establishment



Key activities	The BerryDunn Difference
<ul style="list-style-type: none"> • Background research • Existing document and data collection and review • Initial project planning meeting • Project Work Plan and Schedule development • Stakeholder and stakeholder engagement strategy development • Biweekly Project Status Meetings structure cadence establishment • Monthly Written Updates structure and cadence established 	<ul style="list-style-type: none"> • A fresh review of the City's strategic progress to date • Thorough information-gathering activities • Proven project management methodologies applied in developing guiding documentation, helping to keep the City's project on time and on budget • Early stakeholder identification, determining who to include in the process and how to best engage them at the onset of the project • Consistent project progress update communications, providing transparency and building trust with the City and its stakeholders
<p style="text-align: center;">Deliverables</p> <p>D1. Project Work Plan and Schedule D2. Biweekly Project Status Meetings D3. Monthly Written Updates</p>	

Phase 2: Community Outreach, Engagement, and Strategic Analysis

Leveraging a multifaceted engagement approach to meet Coppell community members where they are, integrating creative and innovative approaches to generate excitement and interest in participation, and applying an intentional focus on inclusivity and accessibility to reach the City's traditionally difficult-to-reach residents



Key activities	The BerryDunn Difference
<ul style="list-style-type: none"> • Stakeholder and community engagement messaging development 	<ul style="list-style-type: none"> • Consistent messaging

- Kickoff project orientation presentation development
- Logistics coordination
- Customized Social Pinpoint site development and administration
- Presence at two established community event where significant attendance is expected
- Presence and facilitation at 10 pop-up events at various City facilities, businesses, and other centralized locations
- A series of 30 one-on-one virtual and in-person interviews with City leadership, staff, and key stakeholders
- Interim Report development
- Environment scan development based on inputs to date
- A series of three Community Forums

Deliverables

- D4. Interim Report
- D5. Community Forums

- A blend of in-person and virtual engagement activities
- Leading edge virtual engagement tools that inspire participants to think big, allow us to analyze feedback based on location data, and provide access to the project and opportunities to engage from anywhere
- Presence and visibility in the community at a variety of events, meeting people where they are
- By setting up tables with activities, prompts, and photo stations, community members are incentivized to participate and provide feedback, particularly the City's youth/young adult demographic cohorts
- Flexibility in when we engage, providing morning, midday, and evening hours
- Detailed outcome documentation to get a clear picture of resident input and inform recommendations development in Phase 3

Phase 3: Findings and Recommendations Development

Consolidating and synthesizing all feedback gathered to create a roadmap of recommended steps to address outcomes from the engagement process and help ensure the City's 2040 Vision Strategic Plan continues to reflect community priorities



Key activities

- Preliminary Draft Findings and Recommendations Report development
- Roadmap development to address any needed changes to the 2040 Vision Strategic Plan
- Report reviewed with City staff, soliciting and incorporating feedback
- Report presentation developed and delivered to City Council
- Final Findings and Recommendations Report developed, incorporating any additional input received

Deliverables

- D6. Preliminary Draft Findings and Recommendations Report
- D7. Final Findings and Recommendations Report and Presentation

The BerryDunn Difference

- Information gathered and is analyzed and synthesized to identify key themes and areas where change may be needed to create greater alignment between the 2040 Vision Strategic Plan and the Coppell community's priorities
- Deliverable review, feedback, and approval at every step, promoting buy-in and consensus for key findings and plans for future strategic progress in the City
- Leadership review and approval, providing executive sponsorship for the outcomes of this process and resulting next steps

Section 3: Project Team

At BerryDunn, we believe in the synergy that accompanies a team approach. That said, we have carefully assembled a project team with unique and specialized qualifications that coincide with the needs and desired outcomes of the City. **These project team members will remain committed, available, and assigned to**

perform the City's requested work effort. Below and on the following pages, we list our project team members' experience, qualifications, and expertise as they relate to projects of this nature and work with comparable local government clients. To stay within the City's stated page limit, our project team members' full resumes can be provided upon further request.



Seth Hedstrom, PMP®, LSSGB | Project Principal
Berry, Dunn, McNeil & Parker, LLC

Seth is a principal and the leader of our Local Government Practice Group. He brings extensive experience in project management. He has served as project principal on nearly all BerryDunn's organizational development projects and has managed more than 75 enterprise process and technology planning projects over the course of 15 years with BerryDunn. Seth has led our clients through many of the complex decision points and issue-resolution processes typical of large-scale planning and improvement projects and facilitated effective change. His experience includes providing oversight of strategic planning projects, assessing and documenting current environments, benchmarking with similar organizations, introducing industry best practices, developing recommendations, conducting organizational and operational assessments, and implementing and operationalizing plans and outcomes.

As the project principal, Seth will maintain overall responsibility for the services provided to the City, help ensure the commitment of our firm and appropriate resource allocation, and review and approve all deliverables in accordance with our quality assurance processes.



Karen Whichard, MPA, Prosci® CCP | Project Manager and Lead Facilitator
Berry, Dunn, McNeil & Parker, LLC

Karen is a senior consultant in our Local Government Practice Group and a seasoned public-sector leader with 19 years of experience in both small and large local governments. Her time with local government organizations ranges from working with a town of 15,000 residents to playing a key role for the City of Charlotte, which is home to nearly 900,000 residents. She boasts a significant track record of successfully building consensus, solving complex problems, and navigating diverse political environments to implement the policy vision of elected bodies.

As the project manager and lead facilitator, Karen will serve as the City's primary point of contact, lead our work and perform day-to-day project management and staff oversight, develop and maintain the Project Work Plan and Schedule, provide regular status updates, design and lead the engagement process, compile and synthesize findings, develop recommendations, and present project outcomes.



Maddison Powers Spencer, MPA | Facilitator
Berry, Dunn, McNeil & Parker, LLC

Maddison is a senior consultant in our Local Government Practice Group. She leverages her firsthand public-sector experience as an assistant to the city manager to support clients and drive successful projects. Certified in the ICA ToP® facilitation methodology, she is adept at leading community and employee engagement efforts and synthesizing outcomes to enhance client results. Maddison's strong communication, leadership, and project management skills complement her ability to conduct current environment assessments, analyze data, and organize and facilitate groups. She has assisted with the development of over 30 local government strategic plans.



Michelle Kennedy, Prosci® CCP, ODCC | Facilitator
Berry, Dunn, McNeil & Parker, LLC

Michelle is a manager in our Local Government Practice Group and has more than 30 years of government-sector management and consulting experience. She is an expert in organizational development, including strategic and business planning, leadership development and executive coaching, organizational assessments, organizational change management, program evaluation, business process improvement, and performance measurement. Michelle has provided consulting services and project leadership for state and local government agencies throughout the United States. She is a strong facilitator and is certified in several related areas including in the ICA ToP® facilitation methodology, a key component of our strategic planning approach. In total, Michelle has facilitated

the development and writing of strategic plans for more than 70 public-sector organizations and provided leadership for several that have been recognized in the industry for strategic planning excellence.



Jen Ferguson, MPA | Facilitator
Berry, Dunn, McNeil & Parker, LLC

Jen is a senior consultant in our Local Government Practice Group. She has over 25 years of public-sector experience and significant expertise in strategic and financial planning. Jen has led, planned, and coordinated fiscal affairs for cities across Washington and Minnesota, holding influential leadership positions such as city administrator, director of finance, and executive director for an economic development authority. Supplementing her background in public-sector administration, Jen is well versed in, organizational development, performance management, operations and process improvement, economic and business development, enterprise resource planning implementations, and is certified in the ICA ToP® facilitation methodology.



Charline Petit Homme, MPA, Prosci® CCP | Facilitator
Berry, Dunn, McNeil & Parker, LLC

Charline is a manager in our Local Government Practice Group and is particularly skilled in leading clients through complex transformational initiatives, including strategic planning projects. She is a strong facilitator and is certified in the ICA ToP® facilitation methodology. Her experience also includes organizing and leading groups through the adoption of new ideas and concepts, and promoting buy-in. She brings in-depth knowledge and involvement with strategic planning, change management, and relationship building through her strong communication, leadership, and project management skills. She is especially skilled at facilitating stakeholder engagement efforts and synthesizing outcomes to optimize results for her clients. Prior to joining BerryDunn, Charline spent multiple years serving the public sector, supporting and conducting field research, data collection, organizational reporting, gap analysis, and recommendations development. She leverages her experience to provide firsthand insights and lessons learned in her consulting engagements.



Ashley Lockhart, PMP®, ACMP CCMP, Prosci®, DiSC®, CPTD, MBTI®, LSSGB | Facilitator
Berry, Dunn, McNeil & Parker, LLC

Ashley is a senior consultant in our Local Government Practice Group. She has more than 10 years of experience in developing and implementing successful change management strategies and e-learning programs for large-scale projects. Ashley has exceptional skills in communication, mentoring, and relationship building. She also has a proven track record in driving organizational growth and success while fostering a positive workplace culture.

As the facilitators, Maddison, Michelle, Jen, Charline, and Ashley will help design and facilitate the engagement process, compile and synthesize findings, develop recommendations, and present project outcomes. They will also provide relevant insights as needed and appropriate as they relate to their specific areas of expertise.



Bailey Dickinson, MPA | Research Analyst
Berry, Dunn, McNeil & Parker, LLC

Bailey is a consultant in our Local Government Practice Group. His extensive background in the public sector has equipped him with a deep understanding of strategic planning within local government organizations. Serving as special projects coordinator for the City of Covington, Georgia, he led cross-departmental strategic initiatives and managed award-winning community engagement projects. Bailey's project management, research, and analysis experience contribute to his skill at advancing strategic planning efforts in local government environments.

As the research analyst, Bailey will document and help analyze engagement outcomes, as well as research best practices and industry standards as needed.

Additional Resources

As mentioned, the SMEs introduced on the following page are only representative of our broader pool of over 335 consulting resources. This pool is composed of highly specialized and skilled public-sector consulting

professionals whose expertise can be leveraged and support can be drawn upon as needed during the City's project.



Khara Dodds, MCRP, AICP | SME
Berry, Dunn, McNeil & Parker, LLC

Khara is a manager in BerryDunn's Local Government Practice Group. She is an American Institute of Certified Planners (AICP)-certified planner with more than 13 years of leadership experience and 20 years of planning and community engagement experience. She believes in the potential of community development to empower communities and positively impact quality of life. Khara leverages her experience in city and regional planning to assist clients as they assess existing policies and processes, collect and evaluate stakeholder input, and identify and implement recommendations for improvement. Khara has a demonstrated commitment to leading diversity, equity, and inclusion (DEI) efforts. She is a member of BerryDunn's CEO Council on Diversity, Equity, Inclusion, Belonging, and Access (DEIBA)'s systemic barriers subcommittee and is certified in Equitable Community Change through eCornell University. She also supports DEI efforts and training through the American Planning Association (APA). In the public sector, she led multiple community equity projects, recommended the declaration of racism as a public health crisis, led affordable housing initiatives, worked with underserved neighborhoods on improvement and revitalization, and secured economic development incentives for large development projects.



Oliver Amaya, CPRP, PMP® | SME
Berry, Dunn, McNeil & Parker, LLC

Oliver is a consultant in our Local Government Practice Group. Before joining our team, he worked with the City of Corpus Christi, Texas Parks and Recreation Department as a special projects manager, where he helped the department execute initiatives based in community development, operational improvement, and increased connectivity. Oliver's experience serving in the U.S. Army also honed his ability to balance complex projects, work in complex environments, solve difficult challenges, and make effective decisions. His fluency in Spanish and Portuguese, in addition to English, enables him to reach diverse groups and listen to their input.



Ryan Hegreess, MS, CPRE | SME
Berry, Dunn, McNeil & Parker, LLC

Ryan is a senior consultant in our Local Government Practice Group, has over two decades of park, recreation, and local government experience across five states. He has honed skills in strategic planning, community-wide communication, and business practice improvement at award-winning departments in Colorado, Texas, and Vermont. Known for his progressive approaches to community engagement, marketing, and event management, Ryan is a sought-after speaker and consultant. He frequently shares insights on marketing, branding, leadership, and innovation through keynote addresses and workshops across North America.

As additional SMEs, Khara, Oliver, and Ryan will provide creative and innovative community engagement subject matter expertise as needed.

Section 4: Past Projects

BerryDunn has been offering a variety of strategic planning services for over 30 years and has worked with a long list of local government clients on comparable initiatives.

To stay within the City's stated page limit, we provide just three example projects on the following page; our full strategic planning client list can be provided upon further request.

Did you know? BerryDunn's team members have provided strategic planning services to more than 70 clients. This includes support to over 40 local government clients in the last four years alone! Notable strategic planning clients in Texas include the Cities of Ennis and New Braunfels.

City of Foley, Alabama | Strategic Planning | 06/2023 – Present

Wayne Dyess, Executive Director of Infrastructure and Development
407 East Laurel Avenue
Foley, AL 36535
251.943.1545 | wdyess@cityoffoley.org

Cian Harrison, Executive Director of General Government and Administration
407 East Laurel Avenue
Foley, AL 36535
251.943.1545 | charrison@cityoffoley.org

The City of Foley engaged BerryDunn to guide development of a Strategic Plan reflecting the community's vision for the future. One of our proposed facilitators, Michelle Kennedy, served as the project manager for this project. Seth Hedstrom served as project principal, and Karen Whichard and Maddison Powers Spencer served as facilitators. We first conducted a thorough community and City assessment, which included customized online surveys, public forums, and focus group meetings with stakeholders. This approach emphasized public involvement, centering the voices of Foley's residents. Through facilitated planning sessions, we helped City leadership define vision, mission, and values statements, which aided the development of strategic goals and targets. To help ensure the successful execution of the final Strategic Plan, we are currently providing performance management training, establishing benchmarks for progress and continuous improvement. This collaborative effort establishes a solid framework for the City's future growth and community engagement.

View the City's customized Social Pinpoint site [here](#).

City of New Braunfels, Texas | Strategic Planning | 02/2023 – 03/2024 |

Jared Werner, Assistant City Manager
550 Landa Street
New Braunfels, TX 78130
830.221.4385 | jwerner@newbraunfels.gov

The City of New Braunfels engaged BerryDunn to facilitate the creation of its first five-year Strategic Plan in over a decade. One of our proposed facilitators, Michelle Kennedy, served as project manager for this project. Seth Hedstrom served as project principal, Karen Whichard served as facilitator, and Maddison Powers served as research analyst. As one of the fastest growing communities in the U.S., the City looked to BerryDunn create a comprehensive, data-driven planning process that included robust community engagement. This led to a plan that provides a framework for City Council and the organization's leadership to establish and execute future policy and financial decisions that are aligned to the City's mission, vision, goals, and objectives. Our project team worked with the City to create an implementation roadmap to help ensure the plan remains current and actionable over its lifespan. The Plan was adopted in March 2024.

View the City's dedicated project landing page [here](#).
View the City's customized Social Pinpoint site [here](#).
View the City's completed strategic plan [here](#).

St. Johns County, Florida | Strategic Planning | 11/2023 – Present

Angie Cowling, County's Chief of Staff for the Office of County Administration
500 San Sebastian View
St. Augustine, FL 32084
904.205.0530 | acowling@sjcfl.us

St. John's County desired a strategic planning process with a comprehensive environmental assessment and robust engagement process. One of our proposed facilitators, Michelle Kennedy, served as project manager for this project. Seth Hedstrom served as project principal, Karen Whichard served as facilitator, and Maddison Powers Spencer served as research analyst. BerryDunn worked with County Commissioners and staff to develop the County's mission, vision, values, and strategic priorities. Then we did a thorough environmental scan that involved six community forums, each representing distinct regions of the County; a statically valid survey; interviews and focus groups; and an Environmental and Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis. Our team facilitated planning sessions with the County Board and department directors to develop a vision, priorities, goals, objectives, and performance measures. The resulting plan serves as a detailed road map for making continued progress for the County. BerryDunn is currently assisting the County in developing department-level implementation plans to support the strategic

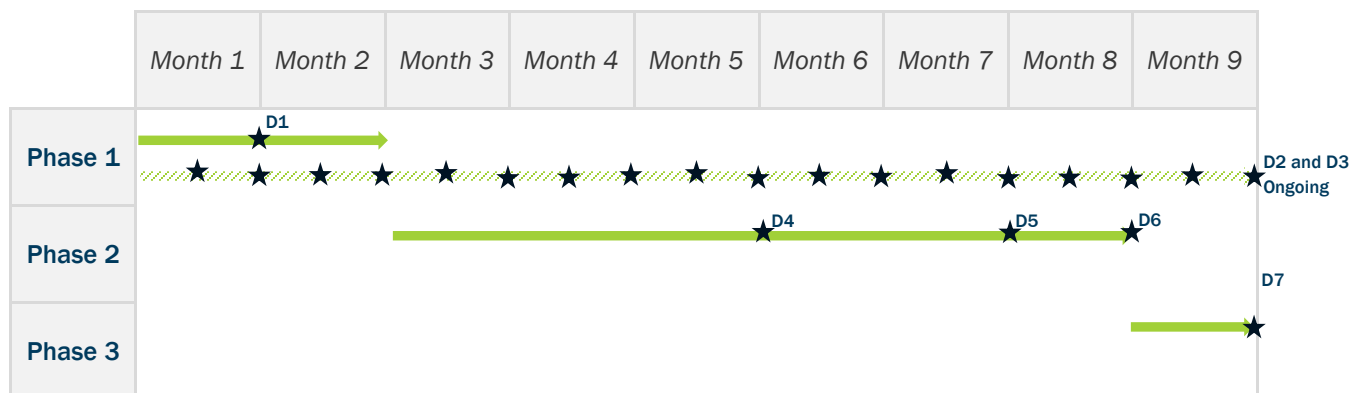
plan and a performance reporting approach including updates, communications, and a public-facing dashboard for the County's website.

View the County's dedicated project landing page [here](#).

View the County's customized Social Pinpoint site [here](#).

Section 5: Project Timeline

We understand that the City envisions this project to take no more than nine months to complete once a contract has been authorized by City Council and signed by the successful responder. We are pleased to state we can accommodate this timeline. We provide details of how this aligns with our proposed work plan on the following page. We are happy to expedite or elongate this process as needed to best satisfy the City's needs, as mutually agreed upon.



Section 6: Cost Proposal

Our fixed-fee services costs are based on our experience conducting projects of similar size and scope, and the assumption that satisfying a deliverable is based on the City's signed acceptance. That said, the City will not incur any additional costs associated with the process of reaching deliverable acceptance. We will utilize our hybrid methodologies through collaborative planning with the City to limit travel expense to the City as appropriate. Our proposed fixed-fee services cost to complete the City's desired project is broken down by phase in Table 1.

Table 1: Cost by Project Phase

Phase	Fixed-Fee Services Cost
Phase 1: Project Initiation and Management	\$14,500
Phase 2: Community Outreach, Engagement, and Strategic Analysis	\$34,500
Phase 3: Findings and Recommendations Development	\$12,500
<i>Supplies and printing</i>	\$5,000
Total Fixed-Fee Services Cost	\$66,500
<i>Travel expense estimated allocation*</i>	\$8,000

**This travel expense allocation represents our best estimate to provide a hybrid approach to service delivery. We would be happy to further discuss and refine this estimate with the City. While our services are proposed as a fixed-fee, we propose to only invoice the City for actual travel expenses incurred.*

Appendix A. Required Forms

Company Information



Company Information

Company Name: _____

Remit To Address: _____

Physical Address: _____

Phone Number: _____

Fax Number: _____

Contact Person: _____

E-mail Address: _____

RFP Form

CITY OF COPPELL
FACILITATION OF SERVICES VISION 2040 PLAN CHECK-IN
RFP FORM

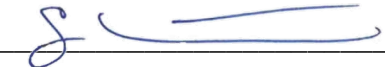
RFP OF _____
(NAME OF FIRM)

THIS RFP IS SUBMITTED TO:

City of Coppell
c/o Procurement Services
255 Parkway Boulevard
Coppell, Texas 75019

DATE: _____

PRINTED NAME: _____

SIGNATURE:  _____

Cooperative Purchasing

COOPERATIVE PURCHASING

As permitted under Government Code, Title 7, Chapter 791.025, other governmental entities may wish to cooperatively purchase under the same terms and conditions contained in this contract (piggyback). Each entity wishing to piggyback must have prior authorization from the City of Coppell and Contractor. If such participation is authorized, all purchase orders will be issued directly from and shipped directly to the entity requiring supplies/services. The City of Coppell shall not be held responsible for any orders placed, deliveries made, or payment for supplies/services ordered by these entities. Each entity reserves the right to determine their participation in this contract.

IS YOUR FIRM WILLING TO ALLOW OTHER GOVERNMENTAL ENTITIES TO UTILIZE THIS CONTRACT, IF AWARDED, UNDER THE SAME TERMS AND CONDITIONS?

_____ **YES**

_____ **NO**

HOUSE BILL 89 VERIFICATION

I, _____ (Person name), the undersigned representative of
(Company or Business
name) _____
_____ (hereafter referred to as company)

being an adult over the age of eighteen (18) years of age, do hereby depose and verify under oath that the company named-above, under the provisions of Subtitle F, Title 10, Government Code Chapter 2270:

- 1. Does not boycott Israel currently; and**
- 2. Will not boycott Israel during the term of the contract the above-named Company, business or individual with the City of Coppell acting by and through City of Coppell.**

Pursuant to Section 2270.001, Texas Government Code:

- 1. "Boycott Israel" means refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations specifically with Israel, or with a person or entity doing business in Israel or in an Israeli-controlled territory, but does not include an action made for ordinary business purposes; and*
- 2. "Company" means a for-profit sole proprietorship, organization, association, corporation, partnership, joint venture, limited partnership, limited liability partnership, or any limited liability company, including a wholly owned subsidiary, majority-owned subsidiary, parent company or affiliate of those entities or business associations that exist to make a profit.*

DATE _____



SIGNATURE OF COMPANY
REPRESENTATIVE

Boycott Energy Companies City of Coppell, TX
Procurement Services

Boycott Energy Companies

I, _____ (Person name), the undersigned representative of

(Company or Business
name) _____

(hereafter referred to as company)

being an adult over the age of eighteen (18) years of age, do hereby depose and verify under oath that the company named above, under the provisions of Texas Government Code Section 809.001:

The contractor verifies that it does not Boycott Energy Companies and agrees that during the term of this Agreement will not Boycott Energy Companies as that term is defined in Texas Government Code Section 809.001, as amended.

DATE



SIGNATURE OF COMPANY
REPRESENTATIVE

Prohibition of Discrimination Against Firearm Entities and Firearm Trade Associations

City of Coppell, TX Procurement Services

Prohibition of Discrimination Against Firearm Entities and Firearm Trade Associations

I, _____ (Person name), the undersigned representative of
(Company or Business
name) _____


_____ (hereafter referred to as company)

being an adult over the age of eighteen (18) years of age, do hereby depose and verify under oath that the company named above, under the provisions of Texas Government Code Section 2274.001:

Contractor verifies that it does not have a practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association as those terms are defined in Texas Government Code Section 2274.001, as amended; and (ii) will not discriminate during the term of this Agreement against a firearm entity or firearm trade association.

This section does not apply if Contractor is a sole proprietor, a non-profit entity, or a governmental entity; and only applies if: (i) Contractor has ten (10) or more fulltime employees and (ii) this Agreement has a value of \$100,000.00 or more to be paid under the terms of this Agreement.

DATE



SIGNATURE OF COMPANY
REPRESENTATIVE

CONFLICT OF INTEREST QUESTIONNAIRE

FORM CIQ

For vendor doing business with local governmental entity

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.
 This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).
 By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.
 A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

OFFICE USE ONLY	
Date Received	

1 Name of vendor who has a business relationship with local governmental entity.

2 **Check this box if you are filing an update to a previously filed questionnaire.** (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 Name of local government officer about whom the information is being disclosed.

Name of Officer

4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

Yes No

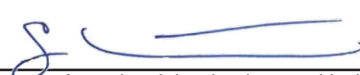
B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

Yes No

5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.

6 Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

7



 Signature of vendor doing business with the governmental entity

 Date

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Berry, Dunn, McNeil & Parker, LLC provides staff and other administrative resources to BDMP Assurance, LLP. If engaged, BDMP Assurance, LLP will lease professional and administrative staff, both of which are employed by LLC, in performing its services. These individuals will be under the direct control and supervision of BDMP Assurance LLP, which is solely responsible for the performance of our engagement.

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This proposal is the work of BerryDunn and is in all respects subject to negotiation, agreement, and signing of specific contracts.

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