

**STATE OF TEXAS           §**  
**§       AGREEMENT FOR PROFESSIONAL SERVICES**  
**COUNTY OF DALLAS       §**

This agreement (“Agreement”) is made by and between the City of Coppell, Texas (“City”) and Future IQ, (the “Professional”) acting by and through their authorized representatives.

**Recitals:**

**WHEREAS**, the City desires to engage the services of Professional as an independent contractor and not as an employee in accordance with the terms and conditions set forth in this Agreement; and

**WHEREAS**, the Professional desires to render professional services for the City in accordance with the terms and conditions set forth in this Agreement;

**NOW THEREFORE**, in exchange for the mutual covenants set forth herein and other valuable consideration, the sufficiency and receipt of which are hereby acknowledged, the parties agree as follows:

**Article I**  
**Term**

1.1 This term of this Agreement shall begin on the last date of execution hereof (the “Effective Date”) and continue on as needed basis.

1.2 Either party may terminate this Agreement by giving thirty (30) days prior written notice to the other party. In the event of such termination the Professional shall be entitled to compensation for any services completed to the reasonable satisfaction of the City in accordance with this Agreement prior to such termination.

**Article II**  
**Scope of Services**

2.1 The Professional shall provide the services specifically set out in Exhibit “A”.

2.2 The parties acknowledge and agree that any and all opinions provided by the Professional represent the best judgment of the Professional.

2.3 All materials and reports prepared by the Professional in connection with this Agreement are “works for hire” and shall be the property of the City. The City shall have the right to publish, disclose, distribute and otherwise use such materials and reports in accordance with the Engineering Practice Act of the State of Texas. Professional shall upon completion of the services, or earlier termination, provide the City with reproductions of all materials reports, and exhibits

prepared by Professional pursuant to this Agreement, and in electronic format if requested by the City.

### **Article III Schedule Of Work**

The Professional agrees to commence services upon written direction from the City and to complete the required services in accordance with a work schedule established by the City (the "Work Schedule").

### **Article IV Compensation and Method Of Payment**

4.1 The City shall compensate the Professional for the services by payment of a fee as set out in the schedule attached in Exhibit "A".

4.2 The Professional shall be responsible for all expenses related to the services provided pursuant to this Agreement including, but not limited to, travel, copying and facsimile charges, telephone, internet and email charges.

### **Article V Devotion of Time; Personnel; And Equipment**

5.1 The Professional shall devote such time as reasonably necessary for the satisfactory performance of the work under this Agreement. Should the City require additional services not included under this Agreement, the Professional shall make reasonable effort to provide such additional services at mutually agreed charges or rates, and within the time schedule prescribed by the City; and without decreasing the effectiveness of the performance of services required under this Agreement.

5.2 To the extent reasonably necessary for the Professional to perform the services under this Agreement, the Professional shall be authorized to engage the services of any agents, assistants, persons, or corporations that the Professional may deem proper to aid or assist in the performance of the services under this Agreement. The cost of such personnel and assistance shall be borne exclusively by the Professional.

5.3 The Professional shall furnish the facilities, equipment, telephones, facsimile machines, email facilities, and personnel necessary to perform the services required under this Agreement unless otherwise provided herein.

### **Article VI Miscellaneous**

6.1 Entire Agreement. This Agreement constitutes the sole and only agreement between the parties and supersedes any prior understandings written or oral agreements between the parties with respect to this subject matter.

6.2 Assignment. The Professional may not assign this Agreement in whole or in part without the prior written consent of City. In the event of an assignment by the Professional to which the City has consented, the assignee shall agree in writing with the City to personally assume, perform, and be bound by all the covenants, and obligations contained in this Agreement.

6.3 Successors and Assigns. Subject to the provisions regarding assignment, this Agreement shall be binding on and inure to the benefit of the parties to it and their respective heirs, executors, administrators, legal representatives, successors and assigns.

6.4 Governing Law. The laws of the State of Texas shall govern this Agreement; and venue for any action concerning this Agreement shall be in Dallas County, Texas.

6.5 Amendments. This Agreement may be amended by the mutual written agreement of the parties.

6.6 Severability. In the event any one or more of the provisions contained in this Agreement shall for any reason be held to be invalid, illegal, or unenforceable in any respect, such invalidity, illegality or unenforceability shall not effect any other provisions, and the Agreement shall be construed as if such invalid, illegal, or unenforceable provision had never been contained in it.

6.7 Independent Contractor. It is understood and agreed by and between the parties that the Professional in satisfying the conditions of this Agreement, is acting independently, and that the City assumes no responsibility or liabilities to any third party in connection with these actions. All services to be performed by Professional pursuant to this Agreement shall be in the capacity of an independent contractor, and not as an agent or employee of the City. Professional shall supervise the performance of its services and shall be entitled to control the manner and means by which its services are to be performed, subject to the terms of this Agreement.

6.8 Notice. Any notice required or permitted to be delivered hereunder may be sent by first class mail, overnight courier or by confirmed telefax or facsimile to the address specified below, or to such other party or address as either party may designate in writing, and shall be deemed received three (3) days after delivery set forth herein:

If intended for City, to:

City of Coppell, Texas  
Attn: City Manager  
255 Parkway Blvd.  
Coppell, Texas 75019  
Facsimile No. (972) 304-3673

With copy to:

Robert Hager  
Nichols, Jackson, Dillard, Hager & Smith  
1800 Lincoln Plaza  
500 N. Akard  
Dallas, Texas 75201  
Facsimile No. (214) 965-0010

If intended for Professional:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6.9 Counterparts. This Agreement may be executed by the parties hereto in separate counterparts, each of which when so executed and delivered shall be an original, but all such counterparts shall together constitute one and the same instrument. Each counterpart may consist of any number of copies hereof each signed by less than all, but together signed by all of the parties hereto.

6.10 Exhibits. The exhibits attached hereto are incorporated herein and made a part hereof for all purposes.

6.11 Indemnification. CITY SHALL NOT BE LIABLE FOR ANY LOSS, DAMAGE, OR INJURY OF ANY KIND OR CHARACTER TO ANY PERSON OR PROPERTY ARISING FROM THE SERVICES OF THE PROFESSIONAL PURSUANT TO THIS AGREEMENT. PROFESSIONAL HEREBY WAIVES ALL CLAIMS AGAINST CITY, ITS OFFICERS, AGENTS AND EMPLOYEES (COLLECTIVELY REFERRED TO IN THIS SECTION AS "CITY") FOR DAMAGE TO ANY PROPERTY OR INJURY TO, OR DEATH OF, ANY PERSON ARISING AT ANY TIME AND FROM ANY CAUSE OTHER THAN THE NEGLIGENCE OR WILLFUL MISCONDUCT OF CITY. PROFESSIONAL AGREES TO INDEMNIFY AND SAVE HARMLESS CITY FROM AND AGAINST ANY AND ALL LIABILITIES, DAMAGES, CLAIMS, SUITS, COSTS (INCLUDING COURT COSTS, ATTORNEYS' FEES AND COSTS OF INVESTIGATION) AND ACTIONS BY REASON OF INJURY TO OR DEATH OF ANY PERSON OR DAMAGE TO OR LOSS OF PROPERTY TO THE EXTENT CAUSED BY THE PROFESSIONAL'S NEGLIGENCE PERFORMANCE OF SERVICES UNDER THIS AGREEMENT OR BY REASON OF ANY ACT OR OMISSION ON THE PART OF PROFESSIONAL, ITS OFFICERS, DIRECTORS, SERVANTS, AGENTS, EMPLOYEES, REPRESENTATIVES, CONTRACTORS, SUBCONTRACTORS, LICENSEES, SUCCESSORS OR PERMITTED ASSIGNS (EXCEPT WHEN SUCH LIABILITY, CLAIMS, SUITS, COSTS, INJURIES, DEATHS OR DAMAGES ARISE FROM OR ARE ATTRIBUTED TO SOLE NEGLIGENCE OF THE CITY). IF ANY ACTION OR PROCEEDING SHALL BE BROUGHT BY OR AGAINST CITY IN CONNECTION WITH ANY SUCH LIABILITY OR CLAIM, THE PROFESSIONAL, ON NOTICE FROM CITY, SHALL DEFEND SUCH ACTION OR PROCEEDINGS AT PROFESSIONAL'S EXPENSE, BY OR THROUGH ATTORNEYS REASONABLY SATISFACTORY TO CITY. THE PROFESSIONAL'S OBLIGATIONS UNDER THIS SECTION SHALL NOT BE LIMITED TO THE LIMITS OF COVERAGE OF INSURANCE MAINTAINED OR REQUIRED TO BE MAINTAINED BY PROFESSIONAL UNDER THIS AGREEMENT. THIS PROVISION SHALL SURVIVE THE TERMINATION OF THIS AGREEMENT

6.12 Audits and Records. The Professional agrees that during the term hereof the City and its representatives may, during normal business hours and as often as deemed necessary, inspect, audit, examine and reproduce any and all of the Professional's records relating to the

services provided pursuant to this Agreement for a period of one year following the date of completion of services as determined by the City or date of termination if sooner.

6.13 Conflicts of Interests. The Professional represents that no official or employee of the City has any direct or indirect pecuniary interest in this Agreement.

6.14 Insurance.

- (a) Professional shall during the term hereof maintain in full force and effect the following insurance: (1) a policy of insurance for bodily injury, death and property damage insuring against all claims, demands or actions relating to the Professional's performance of services pursuant to this Agreement with a minimum combined single limit of not less than \$1,000,000 Dollars per occurrence for injury to persons (including death), and for property damage; (2) policy of automobile liability insurance covering any vehicles owned and/or operated by Professional, its officers, agents, and employees, and used in the performance of this Agreement; and (3) statutory Worker's Compensation Insurance covering all of Professional's employees involved in the provision of services under this Agreement.
- (b) All insurance and certificate(s) of insurance shall contain the following provisions: (1) name the City, its officers, agents and employees as additional insureds as to all applicable coverage with the exception of Workers Compensation Insurance; (2) provide for at least thirty (30) days prior written notice to the City for cancellation, non-renewal, or material change of the insurance; (3) provide for a waiver of subrogation against the City for injuries, including death, property damage, or any other loss to the extent the same is covered by the proceeds of insurance.
- (c) All insurance companies providing the required insurance shall either be authorized to transact business in Texas and rated at least "B" by AM Best or other equivalent rating service, or approved by the City Risk Manager. (d) A certificate of insurance evidencing the required insurance shall be submitted to the City prior to commencement of services.

**EXECUTED** this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_.

City of Coppell, Texas

By: \_\_\_\_\_  
Mike Land, City Manager

Approved as to form:

By: \_\_\_\_\_  
Robert Hager, City Attorney

**EXECUTED** this \_\_\_\_\_ day of \_\_\_\_\_, 2018.

Professional

By: \_\_\_\_\_  
Name:  
Title:

**EXHIBIT “A”  
SCOPE OF SERVICES**

**City of Coppell  
Coppell, Texas**

**Proposal for the Development of Coppell Vision 2040 Strategic Plan  
RFP: #152**

**Submitted by:**



**13 February 2018**

**Future iQ, Inc.  
P.O. Box 24687  
Minneapolis, MN 55424  
[www.future-iq.com](http://www.future-iq.com)**

Contacts:

David Beurle  
[david@future-iq.com](mailto:david@future-iq.com)  
612-757-9190

Heather Branigin  
[heather@future-iq.com](mailto:heather@future-iq.com)  
612-757-9121



Future iQ, Inc.  
P.O. Box 24687  
Minneapolis, MN 55424  
US Federal Tax Number:  
EIN: 27-1389416

February 13, 2017

Charles Ellis, Purchasing Manager  
City of Coppell  
P.O. Box 9478  
Coppell, TX 75019

**RE: Proposal for Development of Coppell Vision 2040 Strategic Plan – Coppell 20Next Plan**

Dear Mr. Ellis,

Future iQ is pleased to submit this proposal to create a new Vision 2040 Strategic Plan for the City of Coppell.

We understand that strategic plans are ‘living documents’ and that this project will require not only alignment with past planning, but a look ahead to the aspirations of Coppell community members for years to come. Future iQ will balance these needs to create a strategic plan that is grounded in city-wide priorities that support and build on the community’s vision, values and goals for the future.

Future iQ has a proven track record of designing and implementing customized large and small-scale community visioning and strategic 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 redevelopment.** 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 tear-downs 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 the planning process. Future iQ will bring this sensitivity to Coppell’s strategic planning 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

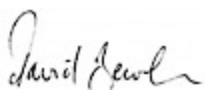
together stakeholders and community members to create unique and cohesive community and economic development plans, and an aligned vision for the future. Importantly, our visioning process provides a collaborative place for participants to share expertise and ideas, and to openly consider various perspectives 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 communities and regions. 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'. We have hosted global Think-Tank forums at Windsor Castle (UK) on 'Building Sustainable Regional Communities'. This experience helps us shape truly future oriented and visionary planning processes that anticipate the future and educate stakeholders on the broader future challenges we all face.
- **We understand the power of good data.** Future iQ specializes in sophisticated data collection and analysis. We believe that good stakeholder process and data collection, presented in a transparent and interactive manner, can help build rapid alignment around key points of consensus. This enables city leadership to make key decisions and planning actions that are defensible and supported by all voices of the community.

Future iQ operates with a high level of integrity and prides itself on its ability to develop and deliver innovative and customized projects that make a lasting contribution. Our high-level engagement, hands-on approach, as well as the effectiveness of our methodology, data visualization graphics and published community-specific reports will help Coppell community members to understand the strategic planning process and their role in making their own future. This thorough understanding of planning is critical, as it will lead to the creation of a vision and strategic plan that can be 'owned' by everyone.

Our goal throughout this project is to empower your city leaders, stakeholders, and community members with the tools they need to create a future for themselves that is visionary, sustainable, innovative and inclusive. It would be our privilege to work with the City of Coppell on this initiative. Thank you for your consideration.

Yours sincerely,



David Beurle  
CEO, Future iQ, Inc.

Email: [david@future-iq.com](mailto:david@future-iq.com)

Tel: +1 612 757 9190

## Table of Contents

<b>1.0</b>	<b>Background on Firm .....</b>	<b>1</b>
<b>2.0</b>	<b>Project Approach/Proposal .....</b>	<b>2</b>
2.1	Phase 1: Initial Planning, Needs Assessment and Schedule .....	3
2.1.1	Initial Planning, Meetings and Schedule .....	3
2.1.2	Background Research.....	4
2.1.3	Benchmark Analysis Report .....	4
2.2	Phase 2: Future Scenarios and Engagement.....	4
2.2.1	Pre-Think Tank Surveys.....	4
2.2.2	City of Coppell Future Think Tank Workshop.....	4
2.2.3	Scenarios of the Future Report.....	7
2.2.4	Community and Stakeholder Engagement.....	7
2.2.5	Engagement Support Training .....	8
2.2.6	Surveys, Data Collection and Analysis.....	8
2.2.7	Data Visualization Platform .....	9
2.2.8	Community and Stakeholder Engagement Report .....	10
2.3	Phase 3: Draft Coppell 20Next Plan .....	11
2.3.1	Think Tank Reconvene .....	11
2.3.2	Focus Groups.....	11
2.3.3	Draft Coppell 20Next Plan Framework.....	11
2.3.4	Initiatives and Prioritization Matrix .....	12
2.3.5	Road map and Key Measures .....	12
2.4	Stage 4: Coppell 20Next Plan Finalization and Presentations .....	12
2.4.1	Final Coppell 20Next Plan .....	12
2.4.2	Graphs and Visuals.....	12
2.4.3	Presentation of Coppell 20Next Plan to City Council and Staff .....	13
2.4.4	Community Presentations of Coppell 20Next Plan.....	13
<b>3.0</b>	<b>Project Team.....</b>	<b>13</b>
3.1	Project Director, David Beurle, CEO, Future iQ .....	14
3.2	Juliana Panetta, J.D., Engagement Specialist .....	15
3.3	Heather Branigin, Vice-President, Business Development .....	16
<b>4.0</b>	<b>Past Projects .....</b>	<b>17</b>
4.1	Six Similar Projects with References .....	17
4.1.1	City of Edina, Minnesota (2017 and 2014-2015) .....	17
4.1.2	Allen County, Ohio (2016-2017 and 2015) .....	18
4.1.3	Moosehead Lake Regional Plan, Maine (2016-2017).....	18
4.1.4	Texarkana, Texas (2015) .....	19
4.1.5	New Hampshire Aerospace and Defense Consortium, New Hampshire, (2017-2018) .....	19
4.1.6	Community Action Partnership of Hennepin County, Minnesota (2017) .....	19
4.2	Relevant Projects .....	20
4.2.1	Town of Hilton Head Island, South Carolina (2016-present) .....	20
4.2.2	City of San Diego, California (2016-present) .....	20
4.2.3	Rural Community Assistance Partnership, Washington, D.C. (2018-present) .....	20
4.2.4	B.E.S.T. of Waseca County, Minnesota (2016-present) .....	20

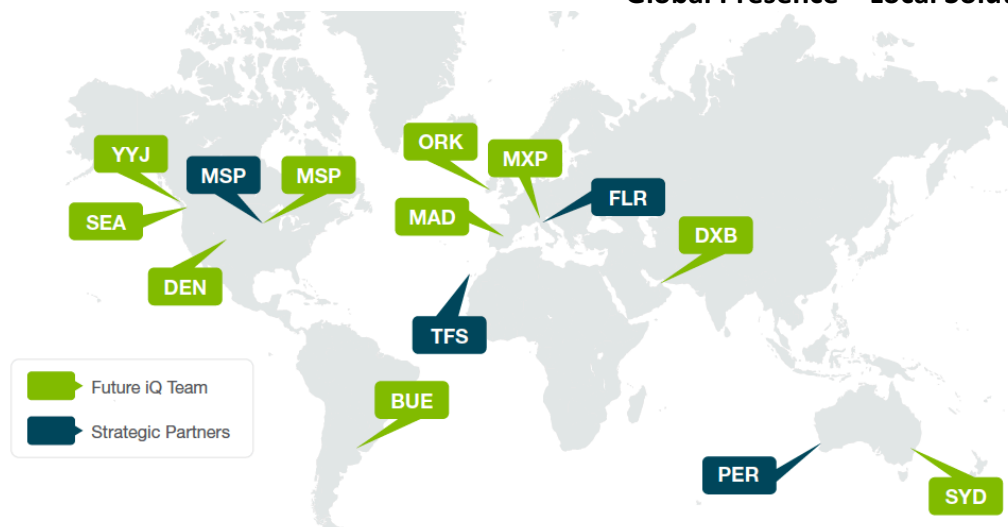
4.2.5	City of Wayzata, Minnesota (2017-present) .....	21
4.2.6	Katahdin Collaborative, Maine (2018-present).....	21
4.2.7	Oshkosh Initiative, Wisconsin (2014-2016) .....	21
4.2.8	Mediterranean Ports Project, Italy/France (2015) .....	21
4.3	Additional Relevant Experience .....	22
4.4	Foresight Experience .....	24
5.0	Project Timeline .....	26
6.0	Cost Proposal .....	27
7.0	Conflict of Interest Questionnaire .....	27

## 1.0 Background on Firm

Future iQ was founded in 2003, and specializes in the field of community and economic planning and development, with a special focus on municipal, industry, and regional economic development, visioning, strategic planning and engagement. Future iQ operates across three continents with seven staff members, three country representatives and four strategic partners located worldwide. In the United States, the company is currently undertaking (or has recently completed) a portfolio of projects in Texas, Ohio, Wisconsin, Minnesota, Illinois, Nebraska, Oregon, Maine, Washington, D.C., California, S. Carolina, Georgia, Arizona, Washington and New Hampshire.

Future iQ operates with a high level of integrity and seeks to serve our clients by delivering innovative and customized projects that make a lasting contribution. Our goal is to help our clients plan for the future based on the collective values, goals and priorities specific to each community.

### Global Presence – Local Solutions



Future iQ specializes in the following functional and sector areas:	Future iQ's specialized methodology includes:
<ul style="list-style-type: none"><li>• City, Urban and Regional Planning</li></ul>	<ul style="list-style-type: none"><li>• Community Engagement</li></ul>
<ul style="list-style-type: none"><li>• Economic and Workforce Development</li></ul>	<ul style="list-style-type: none"><li>• Strategic Planning and Visioning</li></ul>
<ul style="list-style-type: none"><li>• Non-profit Strategic Planning</li></ul>	<ul style="list-style-type: none"><li>• Network and Supply Chain Mapping</li></ul>
<ul style="list-style-type: none"><li>• Defense Sector Engagement</li></ul>	<ul style="list-style-type: none"><li>• Data Visualization</li></ul>
<ul style="list-style-type: none"><li>• Organizational and Corporate Planning</li></ul>	<ul style="list-style-type: none"><li>• The Future Game</li></ul>
<ul style="list-style-type: none"><li>• Tourism Industry Planning and Analysis</li></ul>	<ul style="list-style-type: none"><li>• Customized Foresight Research</li></ul>

Please refer to [www.future-iq.com](http://www.future-iq.com) for more detail.

## 2.0 Project Approach/Proposal

Future iQ brings a global perspective to visioning and strategic planning that is invaluable to local interests. For the City of Coppell, 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 City staff to develop comprehensive, future-oriented, sustainable and implementable strategies to support the new Coppell 20Next Plan. These strategies will balance priorities across the important dimensions specific to the City of Coppell and incorporate global and local best practices.

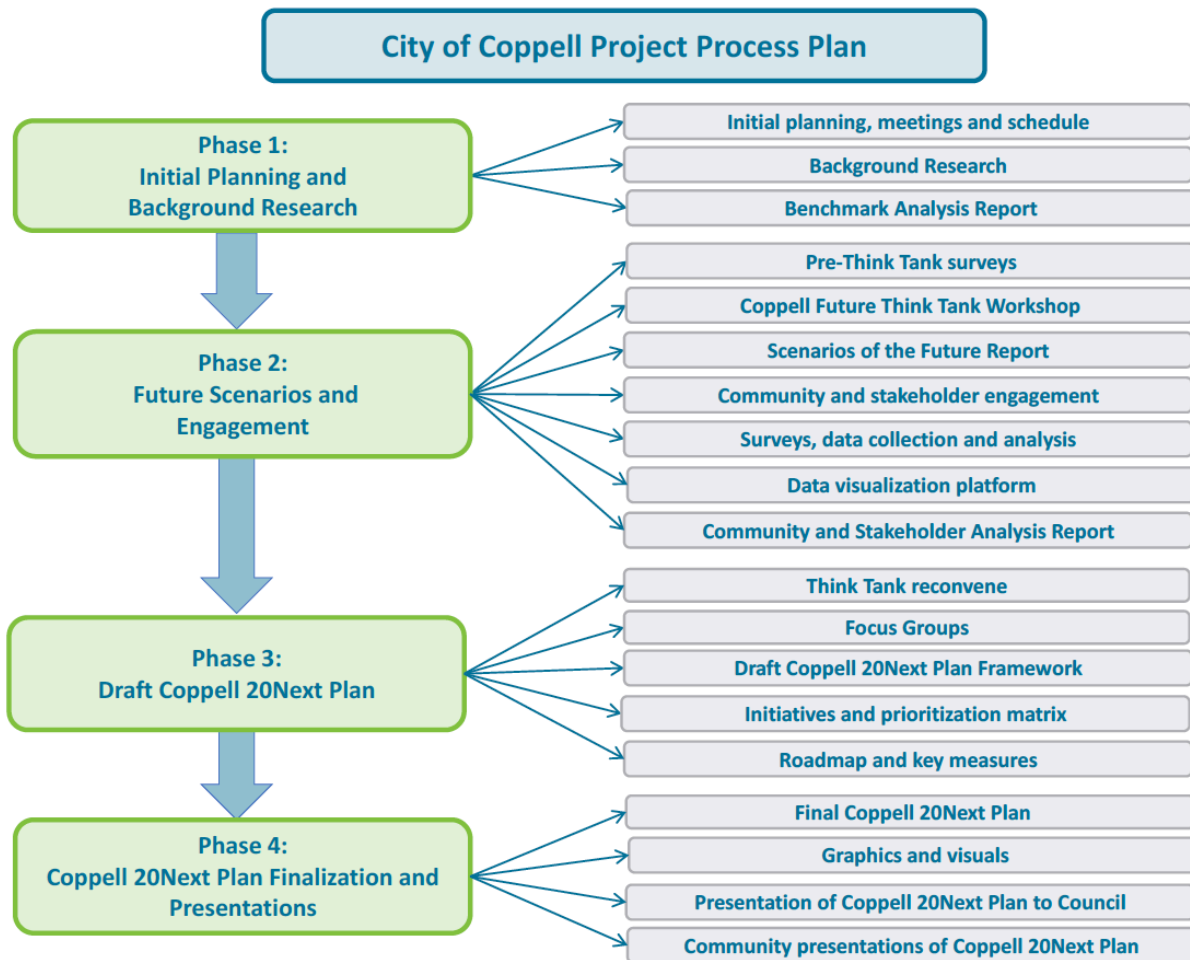
Future iQ believes this project is an opportunity for the City of Coppell to create an innovative Strategic Plan that will support and guide its community well into the future. Building off the City's past and recent significant planning efforts and historical context, Coppell leadership has a wonderful opportunity to lead its community into a planning phase that will define the City for the next decades. The challenges of costs, funding, staffing and program coordination can be daunting, but the opportunities to better serve and provide leadership to the community will strengthen the driving force of the City as it pursues its long-term goals through its Strategic Plan. Any long-term vision for the City of Coppell must be seen through the lens of its vision and strategic planning and this will lead to the development of an inclusive and sustainable plan that will guide the town for years to come.

Drawing on previous experience, we believe that the best way to produce a successful strategic plan is by using a customized, people-focused, scenario-based methodology supported by data. The informed bottom-up driven approach proposed is inclusive and integrates values and quality of life perspectives that are intrinsic to long-term cohesive city-specific planning. Future iQ anticipates the duration of this project to be approximately 11 months, from March 2018 – January 2019. This timeframe is flexible depending on the needs of Coppell. The Project Director will monitor the project with City staff and make on-site visits to attend meetings, host key workshops, and present a final status report. The additional Future iQ team members will assist with project research, reports and engagement sessions. The proposed project plan and production of deliverables are divided into four phases described and illustrated in the project process plan diagram below. All key areas of work and deliverables outlined in the RFP will be included in the scope of work and incorporated into the following phases.

- Phase One: Initial Planning and Background Research
- Phase Two: Future Scenarios and Engagement
- Phase Three: Draft Coppell 20Next Plan
- Phase Four: Coppell 20Next Plan Finalization and Presentations

The scope of work outlined below will extend well beyond the traditional SWOT analysis and comprehensive planning, and will look more broadly at the City's potential future and its

implications. The process will help to define a broad community vision, objectives and directions, using a collaborative process and multiple engagement techniques.



## 2.1 Phase 1: Initial Planning, Needs Assessment and Schedule

### 2.1.1 Initial Planning, Meetings and Schedule

This project will begin with meetings between Future iQ team members and City staff to establish a final work program and schedule specifying the number and type of planned meetings to occur throughout the project. This would include a detailed schedule and process for the project, and a review of the nature, quality, and format of reports to be produced. The schedule and process for the project will be clearly stated, compelling and implementable. Initial stakeholder interviews and meetings will be held to build rapport and a better understanding of the prevailing City dynamics, concerns, issues, and expectations.

### **2.1.2 Background Research**

Working closely with City staff, our team will conduct relevant background research, including the exploration of existing planning efforts in order to understand those strategic directions already established for the city, as well as to identify progress made towards meeting these objectives.

### **2.1.3 Benchmark Analysis Report**

This analysis report will provide an up-to-date City profile in conjunction with city and issue comparisons that are used as reference throughout the strategic planning process. To see a similar report (Benchmark Analysis) please visit: <http://future-iq.com/project/city-wayzata-minnesota-usa-2017/> or <http://future-iq.com/project/vision-edina/>

## **2.2 Phase 2: Future Scenarios and Engagement**

### **2.2.1 Pre-Think Tank Surveys**

Future iQ will work closely with City staff prior to the Coppell Future Think-Tank Workshop to develop a Pre-Think Tank survey involving research of relevant local, regional and macro trends. The survey will explore participant perceptions about the future, perceived areas of opportunity and threat, views about changes occurring in the city and future risk. A summary report will be provided to the City before the Think Tank.

### **2.2.2 City of Coppell Future Think Tank Workshop**

Future iQ's unique approach to visioning and community engagement focuses on scenario-based strategic planning and stresses the role of future-thinking to identify shared interests, values and common concerns. Working with core representatives and invited community members and stakeholders identified by City staff, the scenario Think Tank planning process develops a series of plausible futures. It provides a robust framework to test proposed strategies and assumptions, and a 'testing ground' for planning, particularly in complex or changing communities. These sessions bring together local community members and provide an important forum for discussion and planning about the next 5-20 years.

The Think Tank process will help to define a broad community vision, objectives and directions, using a collaborative process and multiple engagement techniques. This would be conducted as a highly participatory 8-hour workshop held over the course of one day or two evenings, and would include 70-90 key representative stakeholder and community participants. The workshop program includes:

- Review of important trends, background research and stakeholder networks.
- Identification of key drivers shaping the future and clustering of critical sets of drivers.

- Formulation of different plausible scenario ‘spaces’. Developing detailed narratives and descriptions about each scenario.
- Examining the impact and consequences of each scenario on various aspects of the City of Coppel.
- Identifying preferred futures and critical actions steps.

For Coppel, the scenario-based Future Think Tank Workshop will be a tool to gain better understanding of community priorities and resource allocation particularly in the areas of community and economic development. Scenario Planning is a method that is used to develop plausible scenarios for the future. There are several key criteria needed:

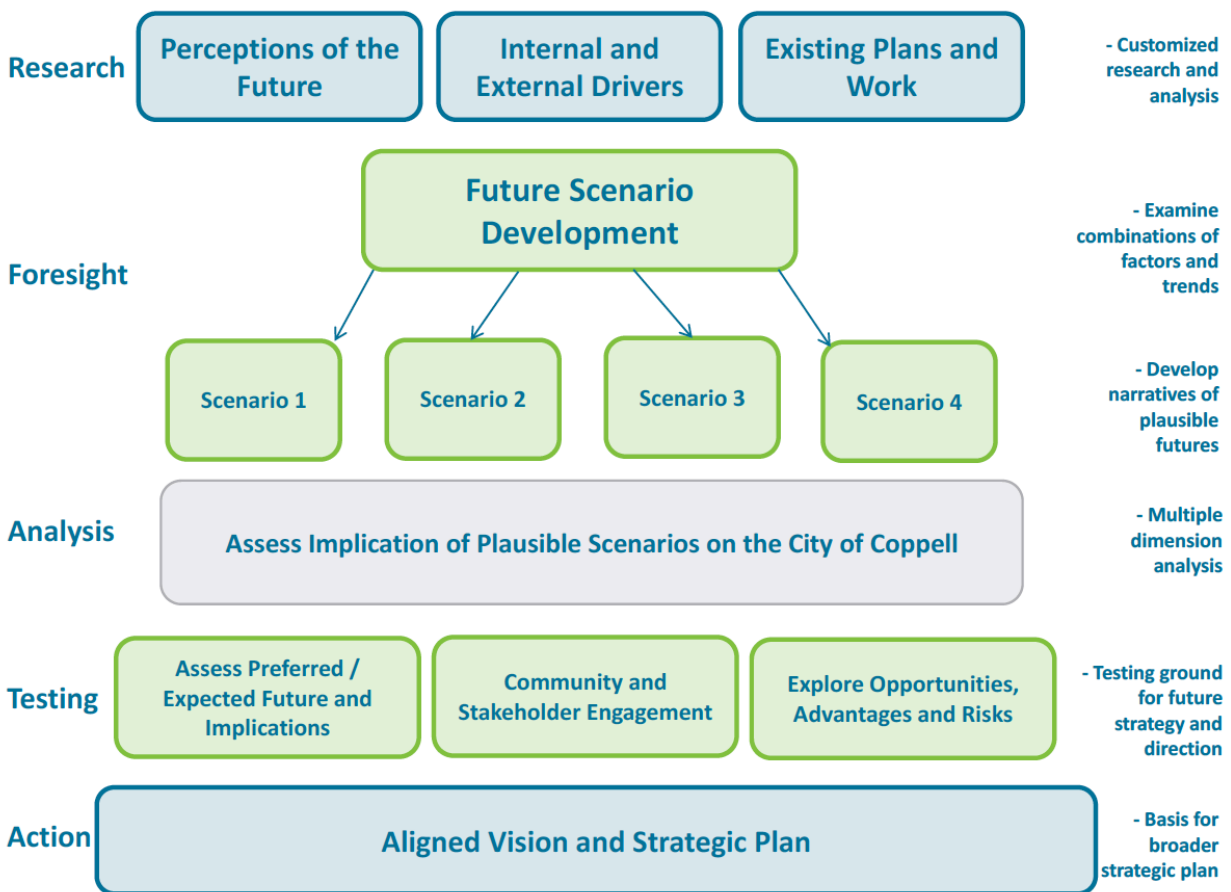
- **Strong collaborative approach.** The long-term success of this project will be dependent on building strong collaboration among the City’s various stakeholders and community members. The development of this type of ‘eco-system’ needs to be built in upfront in the planning stages of the project with a conscious effort to build on points of consensus to create a common vision for the City. The Project Director will work with City staff to engage as many community members and stakeholders as possible in the planning process.
- **Future oriented.** Building a community-wide shared vision of the future will be critical for the City of Coppel. In order to develop an agreed-upon strategic plan, community members and stakeholders will need clarity and a common understanding of the drivers impacting the City and the region.
- **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 members and 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. As specified in the RFP, we will also provide at a minimum, monthly written updates to City Staff. Future iQ team members will work throughout the duration of the project to update and keep current the project information distributed to stakeholders and community members. It is our firm belief that consistent and easily accessible project communications add to the transparency of the process and encourage community participation.

Scenarios are not predictions, but are a way of exploring plausible futures. The methodology expands on traditional strategic planning in that it allows the exploration of many factors, or drivers of the future at the same time. This is done by using local knowledge and expectations about the drivers to produce a framework that defines and explores a range of plausible futures. This enables people to explore the impacts and consequences of a range of different future paths as they seek a preferred future. The key aspects and features of the approach include:

- It is customizable and built around the work program defined in this proposal.

- 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 engagement is front and center in the design, and all stakeholders have the option to have input via multiple methods.
- The process is inclusive and easily scalable, and can draw input from all sections of the community - from backyards to classrooms to boardrooms.
- Outputs include high quality reports, data analysis and presentations where stakeholder input is valued and reflected in the final outcomes.

Below is the visual outline of how the scenario-based strategic planning process works:



We believe this process is trying to answer important questions such as:

- What should the City of Coppell become?
- How will community preferences fit into this vision?
- How does the City of Coppell ensure that planning for the future will incorporate values and quality of life issues for all community members served?
- How should public funds be invested and leveraged to improve the City?

In addition, we believe that we can use the opportunity of the strategic planning process to further examine the circumstances identified in the RFP including:

- What are the specific strategic gap and growth areas for the City and does previous planning address those areas?
- How does the community of Coppell want to redevelop existing spaces to accommodate future growth?
- How may financial/budgetary issues at the State level impact the City and how can the City prepare for potential budget challenges?
- Where does Coppell fit into the world, and what are its unique competitive strengths?
- How does the City anticipate and take advantage of emerging trends in the economy, Country, and aspirations of community members?
- What hurdles might Coppell face, and how do we build collaborative approaches and structures to ensure continued successful programs?
- 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 Coppell community members want to tell about themselves and what do they want to be in the future?

The methodology being proposed will allow Coppell stakeholders and community members to tackle these questions in an engaging and thought-provoking manner. This will then lead to the clarification of priorities and actions that will define a clear road map for the Strategic Plan.

### **2.2.3 Scenarios of the Future Report**

Following the Think-Tank, Future iQ will prepare a detailed workshop report with outcomes and scenario analysis, together with survey results and key recommendations. This material provides the basis for the broader community engagement phase and ultimately identification of the preferred future (strategic vision) for the City of Coppell. To see a sample 'Scenarios for the Future' Report, please visit: <http://future-iq.com/project/vision-edina/>

### **2.2.4 Community and Stakeholder Engagement**

Following the Think-Tank workshop, the broader public engagement will begin in earnest. This is the stage where groups not commonly involved in community activities will be sought out with the assistance of city staff and other groups. The extent of this engagement will be determined in close consultation with City staff and we will seek to build off Coppell's recent Citizen Summit by incorporating issues of importance highlighted through the Think Tank process. The following face-to-face engagement approaches may be used:

- Focus groups and/or workshops
- Larger town hall-style meetings as well as small-group meetings
- Housing Association / Community groups / Sector workshops / High-school aged groups

- Intercept surveys
- Interviews with stakeholders

The Community-wide forums, focus groups and/or workshops will include:

- Introduction to the project
- Outline and discussion of key issues and trends
- Outline of the scenarios developed by the Think-Tank group
- Discussion about potential implications and impacts of each scenario on the target workshop groups or stakeholders
- Completion of detailed input survey

It is anticipated that approximately 20-25 targeted workshops will be held, providing access to a cross-section of community members and stakeholders. The workshops are typically 1.0 to 1.5 hours, and include about 20 minutes to complete a comprehensive Community and Stakeholder Survey (described in Section 2.2.6)

Future iQ has allocated time on-site for detailed work presentations and stakeholder engagement. Our team will facilitate these focus groups, workshops and interviews. In our experience, an additional successful engagement strategy may also involve a locally trained team made up of City staff or volunteers willing to go out into the community to engage local citizens in the visioning process. This added City involvement creates a collaborative environment between local government and citizens that can add to the success of the visioning process. This idea is further explored in Section 2.2.5 and is presented as an ‘optional’ element to this process plan as not all city budgets are able to commit the resources towards this option.

### **2.2.5 Engagement Support Training**

Future iQ’s engagement support training is an optional element to the visioning and strategic planning process. We have found that this engagement usually creates a highly collaborative environment between and City and its citizens during the process and encourages participation by community members and stakeholders. The Project Director will train the volunteers in a training session at the beginning of the engagement process. A PowerPoint along with handout materials will be provided to the volunteers to use during their presentations.

### **2.2.6 Surveys, Data Collection and Analysis**

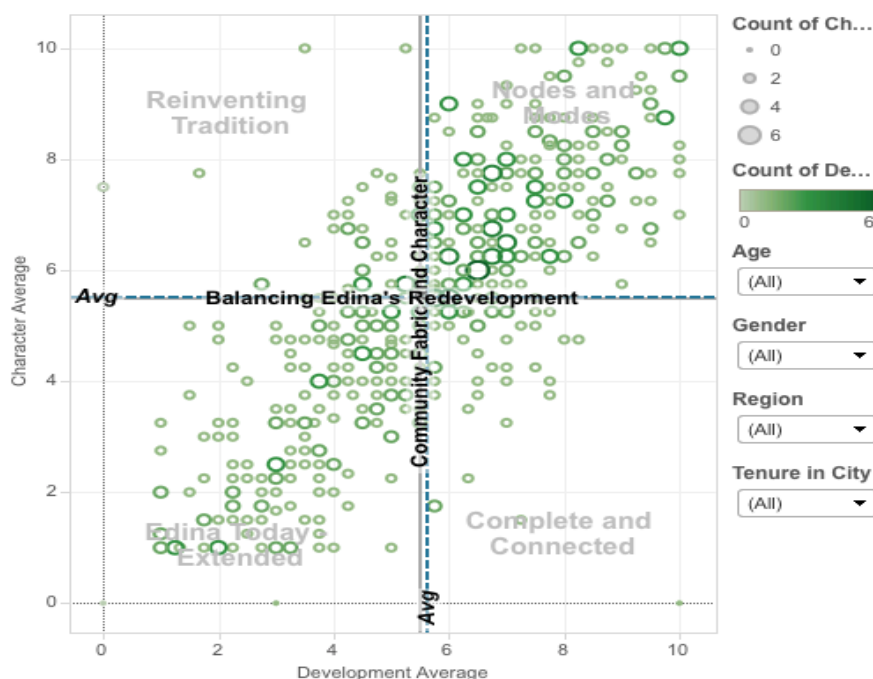
Data collection from as many community members and stakeholders as possible will provide an inclusive process and a comprehensive understanding of community and stakeholder views and where points of consensus lie. Following the Think-Tank, Future iQ will prepare a detailed Community and Stakeholder Vision Survey that will be made available community-wide through various communications efforts. Hard copy surveys will be available at the community workshops and events and we will also provide an online Community and Stakeholder Vision

Survey option to allow for broad based participation into the process. In all cases, expertly designed survey instruments will capture community and stakeholder perspectives, visions and priorities. The surveys will examine appetite for change, and sensitivity to a range of future shaping themes, identified in the Think-Tank process.

## 2.2.7 Data Visualization Platform

Using Future iQ's online Lab Portal, the survey results will be collected and presented in an innovative and interactive data visualization platform. This will allow community members and 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. Examples of such an interactive data visualization developed by Future iQ can be viewed at <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 community. Future iQ developed this platform to provide a people-focused, data-driven approach to visioning and key issue analysis.

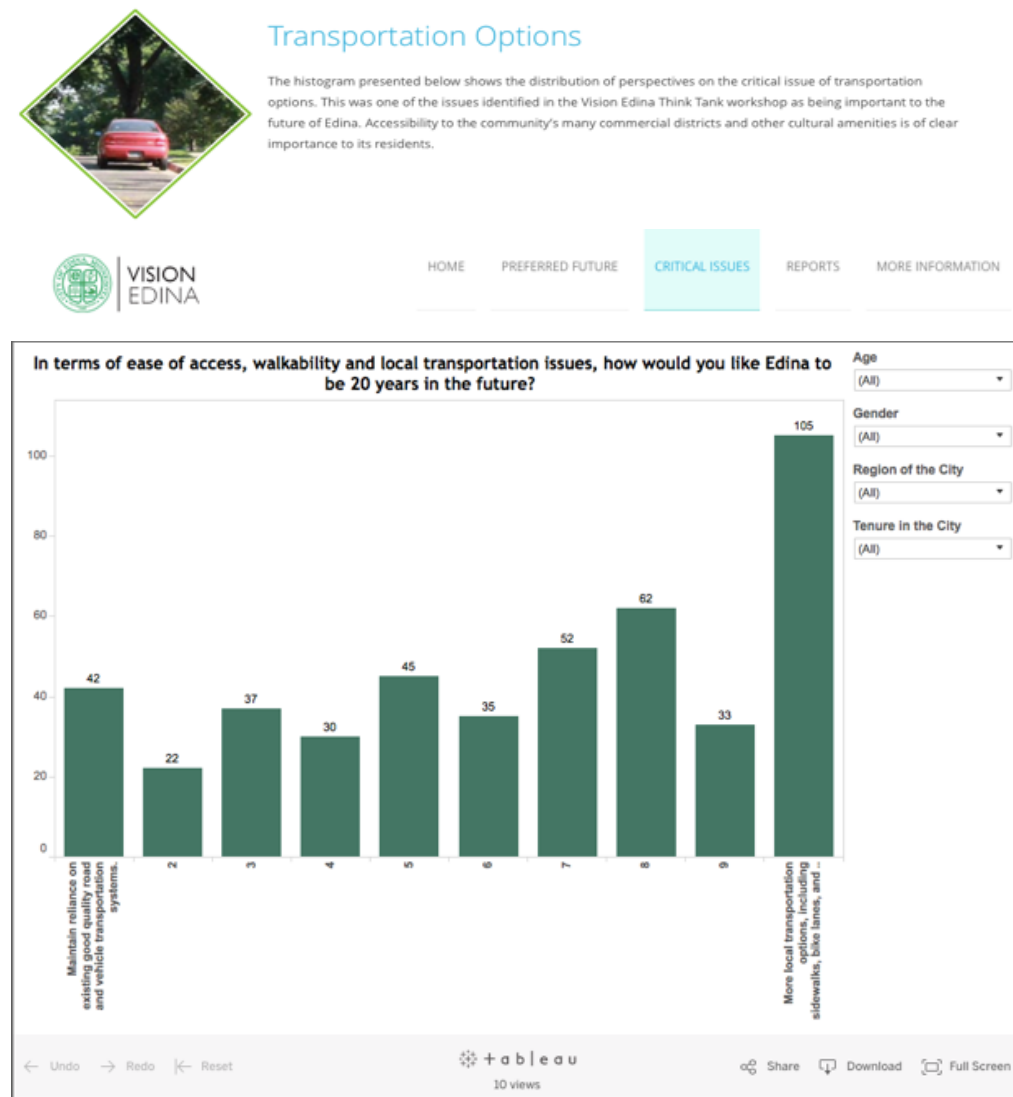
The following image shows an example of the screen shot of the 'point of consensus' in an example project. The dots represent groups of community members and where their preferred future was located relative to a range of choices within the scenario matrix. The point of consensus will move depending on the search filters selected, allowing for an engaging and interesting way to explore the various views of different cohorts and groups within the community. For the City of Coppell, we would set filters based on profile questions such as age, length of time living or working in the City, living location area, gender, ethnic background, etc.



### Sample Data Visualization

## Example of data visualization platform page

The following screen shot shows responses, from an example project, to one of the key slider sensitivity questions. Again, it shows how this can be filtered and explored. This approach to data collection and visualization allows extra insight to be gathered from the community surveys.



### 2.2.8 Community and Stakeholder Engagement Report

In addition to the quantitative analysis, each Community and Stakeholder Vision Survey is accompanied by an open-ended response section. The qualitative responses will be analyzed, allowing us to explore community member and stakeholders' perspectives more deeply on key issues or topics. Based on stakeholder engagement process, we will prepare a Community and Stakeholder Engagement Report, which will provide a detailed analysis of the project's

community and stakeholder views and desires for the future. For an example of this type of report, please see the following link: <http://future-iq.com/project/vision-edina/>

## **2.3 Phase 3: Draft Coppel 20Next Plan**

### **2.3.1 Think Tank Reconvene**

To validate the planning process, the Project Director will reconvene the original Coppel Future Think Tank participants. At this second workshop, the group will revisit results from the first Think Tank and incorporate the results from the expanded community engagement to establish priorities for the final Strategic Plan. These initiatives and priorities will be produced in the form of a prioritization matrix and will provide the basis for the Roadmap and key measures to be presented as part of the final Strategic Plan document. This workshop will seek to foster a sense of cohesion and alignment going forward by allowing participants the opportunity to validate the final vision, strategic direction and findings for the City.

### **2.3.2 Focus Groups**

Future iQ will convene 1-3 Focus Groups to finalize strategic priorities and action areas to be included in the draft strategic plan document. Future iQ will also use the focus groups to facilitate the translation of the conceptual goals of the visioning process into realistic, achievable targets to be incorporated into the strategic plan. The Coppel 20Next Plan will be a working document with the understanding that it must be adaptable to current conditions over time including considerations for the next planning process.

### **2.3.3 Draft Coppel 20Next Plan Framework**

Future iQ will compile all reports and results of research, engagement, and analysis from Phases 1, 2 and 3 into an initial draft of the strategic plan framework containing the final agreed-upon strategic direction for the City. The City staff will be invited to review the draft, and input and comments will be incorporated. As specified in the RFP, Future iQ will provide a digital PDF file of the draft. In addition to items discovered in the initial planning and engagement processes, the framework will include the following elements:

- Introduction
- Forward (optional)
- Community Snapshot
- Community and Stakeholder Analysis
- Key Findings
- Strategic Action Plan Framework
- Initiatives and prioritization matrix (see section 2.3.4)
- Roadmap and Measures (see section 2.3.5)
- Opportunities and Risks

- Looking Ahead: Topics for the Future
- Considerations for the next planning process and unanticipated constraints

#### **2.3.4 Initiatives and Prioritization Matrix**

Based on the information gathered for the draft strategic framework, Future iQ will work closely with City staff to synthesize the information to generate an initiative and priority project matrix. These initiatives and priorities will be produced in the form of a prioritization matrix and will provide the basis for the strategic roadmap to be presented as part of the final Strategic Plan document. It is at this point that one of the focus group sessions from Section 2.3.2 may be held to get feedback on the draft Plan and to gain insights on a realistic timeline for the road map and key measures.

#### **2.3.5 Road map and Key Measures**

Using the draft strategic plan framework content, Future iQ will prepare a strategic road map for the Coppel 20Next Plan. The road map will recommend a course of action along a timeline to implement the Strategic Plan including measures that will monitor the City's progress along the way. The Coppel 20Next Plan will be a working document with the understanding that it must be adaptable to current conditions over time including considerations for the next planning process.

### **2.4 Stage 4: Coppel 20Next Plan Finalization and Presentations**

#### **2.4.1 Final Coppel 20Next Plan**

The Coppel 20Next Plan document will include full integration of all reports, research, engagement and analysis. This will incorporate the proposed data analyses, vision and plan framework and provide recommended strategies and rationale for policy development, long-term investments and resource allocation to build on and complement recent planning efforts. Individual components of the plan will have been generated in Phases 1, 2, and 3, and deliverables from these earlier phases will have been available for comment from the City Council and Staff, community members and stakeholders. The City Manager and/or City Council will also be invited to write a Forward or 'Letter to the Community' about the planning process and what it means for the City of Coppel. For an example of this type of Forward, please see the NHADEC Strategic Action Plan at <http://future-iq.com/project/aerospace-defense-export-consortium-strategy-development-new-hampshire-usa-2017/>.

#### **2.4.2 Graphs and Visuals**

Future iQ will create visual elements and graphics reflecting the City's community ideas and options supporting the final Strategic Plan. Future iQ will also provide professionally created

streetscape renderings to illustrate potential development for the community. This will provide a strong visual narrative of the future vision and desired and potential strategic plan outcomes.

### **2.4.3 Presentation of Coppell 20Next Plan to City Council and Staff**

The final Strategic Plan will be presented in person by the Project Director to the City's Council at a regularly scheduled Council meeting. The timing of this final step will be determined with City staff in the initial project meetings and discussions.

### **2.4.4 Community Presentations of Coppell 20Next Plan**

As a final community engagement step in the strategic planning process, the Project Director will host three community forums with City representatives to present the Coppell 20Next Plan to community members and stakeholders. This step will support the City's stated desire to place a high priority on citizen participation and communication throughout the planning process.

## **3.0 Project Team**

The Future iQ team presented in this proposal have significant experience working on community engagement and planning projects. The team has worked with large-scale engagement sessions, with up to 800 participants at a single session, as well as smaller-scale sessions that have taken place in libraries and community-member homes. 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. The team skills are complementary, with a mix of required skills in:

- Highly developed critical thinking capacity in the areas of organization design, strategic planning and collaboration building
- 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 and supply-chain analysis

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 (davidbeurle.com).

## 3.1 Project Director, David Beurle, CEO, Future iQ

### RÉSUMÉ



#### 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



### DAVID BEURLE, *B.SC. 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

- Snohomish County, Washington, Tourism Implementation Plan 2017
- City of San Diego Defense Industry Economic Development Plan, California, US, 2016 - 2017
- 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, 2016-18
- 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
- Griffith Foods Scenario Planning Chicago, US, 2016
- Mediterranean PORTS EU Projects Italy/France, 2015
- Fox Valley Defense Industry Adjustment, Wisconsin, US, 2014 - 2015
- Texarkana Defense Project, Texas, US, 2015
- Vision Edina, Minneapolis, US, 2014 - 2015
- Australian Grain Research and Development Corporation, Western Australia, 2008 - 2015
- Vadinia Project, Leon, Northern Spain, 2014
- Agriparco Montespertoli, Tuscany, Italy, 2014
- Govt. of Alberta Small Business Strategy, Canada, 2013
- Steering it Forward North East Nevada, US, 2013
- Mount Pierre Project, Australia, 2013
- Kewaunee Economic Adjustment Project, Wisconsin, US, 2013
- Global Think Tank, Windsor Castle, UK, 2012
- Future West Cork, Ireland, 2009 - 2012
- Palliser Futures Project, Alberta, Canada, 2009
- Winnemucca Futures Project Nevada, US, 2009

#### RECENT PUBLICATIONS

- The Next Industrial Revolution, 2017
- 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

#### KEYNOTE PRESENTATIONS

- 22nd Annual Recycling Association of Minnesota (RAM) / Solid Waste Association of North America (SWANA) Conference & Show, Keynote Speaker (October 2017)
- Aggregate & Ready Mix Association of Minnesota (ARM) Annual Convention, Minneapolis, USA (November 2017)
- National Congress of American Indians - customised Future Game (October 2017)
- 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, USA - Community visioning think-tank and workshops (June 2017)
- RK 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 Tyrrhanean Sea - European Union Port Project, Italy and France (February 2015)
- St George's House, Windsor Castle, UK - Building Sustainable Regional Communities (2012)

**DAVID BEURLE**  
david@future-iq.com

## 3.2 Juliana Panetta, J.D., Engagement Specialist

### RÉSUMÉ



#### EDUCATION

Juris Doctor / Doctor of Law  
Mitchell Hamline School of Law, MN  
  
Bachelor of Arts in International Relations  
Saint Cloud State University, St Cloud MN  
  
University of São Paulo (USP), Brazil

#### EMPLOYMENT

Minneapolis Grain Exchange,  
Minneapolis MN 2015-2016  
  
U.S. Bank, Minneapolis, MN, 2011 – 2014  
  
United Nations Association of  
Minnesota, St. Paul, MN, 2008-2010



### JULIANA PANETTA, J.D., B.A.

#### IN-HOUSE ATTORNEY / ENGAGEMENT SPECIALIST

Juliana Panetta is an attorney and engaging communicator who is passionate about problem solving and creating innovative solutions for complex situations. She was born in São Paulo, Brazil and has particular expertise in Corporate, Employment and Immigration Law, having worked for a futures and options derivatives exchange and for the 5th largest commercial bank in the United States. Juliana's communication and engagement skills allow her to work alongside stakeholders to develop strategies that fit their long-term goals. Juliana is very interested in stories that emerge through data analysis and collection, and enjoys working with clients to bring information to life via Future iQ's data visualization platform. Juliana was the President of the American Heart Association's Heart and Stroke Ambassadors group and is a longtime volunteer of Children's HeartLink, lending her Portuguese language skills to a nonprofit that supports the formation of self-sustaining centers of excellence in the treatment of pediatric congenital heart disease in the developing world.

#### RECENT PROJECT EXPERIENCE

- Wayzata Community Vision, Wayzata, MN, June 2017 - Present
- Future of Midwest Agriculture, University of Minnesota, March 2017 - Present
- Edina Nodes and Modes Bridging Sessions, Edina MN 2017
- Community Action Partnership of Hennepin County, St. Louis Park, MN 2017
- Cyber Security Taskforce, Minneapolis Grain Exchange, 2015 - 2016
- Legal Advisory Council Member, U.S. Bank's Law Division, 2014
- Model UN Program Coordinator, United Nations Association of Minnesota, 2008 - 2010

#### RELEVANT PUBLICATIONS

- City of Wayzata Scenarios of the Future Report, Wayzata, MN, 2017
- City of Wayzata Community Profile and Benchmark Analysis, Wayzata, MN, 2017
- Future of Midwest Agriculture, Scenarios of The Future Report, Saint Paul, MN, 2017
- Community Action Partnership of Hennepin County Strategic Plan, Hennepin County, MN, 2017
- Community Action Partnership of Hennepin County Stakeholder Engagement Analysis, Hennepin County, MN, 2017
- Community Action Partnership of Hennepin County Scenario-Based Think Tank Workshop Report, Hennepin County, MN, 2017
- Nodes and Modes, Bridging Between Vision and Planning, Edina, 2017

#### JULIANA PANETTA

juliana@future-iq.com

### 3.3 Heather Branigin, Vice-President, Business Development

#### 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

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 2019

#### PHILANTHROPIC WORK

Volunteer Judge, Future City Competition, MN,  
2017-present

Advisory Council Member, United Nations  
Association of MN, 2014-present

Co-President (2011-2013) and Board Member  
(2010, 2014), United Nations Association of MN



#### HEATHER BRANIGIN, M.A.T., B.A.

##### VICE PRESIDENT, BUSINESS DEVELOPMENT

Heather has worked in the fields of Development and Education for over 20 years. She has extensive experience in local government and growing small business and organizations, and is an accomplished project manager, research analyst and writer. Originally from Canada, Heather has an educational background in Political Science, International Relations and Education. She is Past President and current Advisory Council Member of the United Nations Association of Minnesota and is committed to encouraging international understanding and global collaboration, especially through experiential education programs. Heather has coordinated numerous conferences involving 2,000+ participants, public events and workshops, and applies her research and writing skills in both her professional and volunteer work. Heather researched and co-produced Future iQ's foresight publications *The Future of Food* and *The Next Industrial Revolution*.

#### RECENT PROJECT EXPERIENCE

- Rural Community Assistance Partnership Strategic Plan, Washington, DC, 2018 - Present
- Wayzata Community Vision, Wayzata, MN, 2017 - 2018
- New Hampshire Aerospace and Defense Export Consortium Strategic Plan, NH, 2017 - Present
- Waseca Vision 2030, Strategic Plan and Action Plan, Waseca, MN, 2017 - Present
- Edina Nodes and Modes Bridging Sessions, Edina, MN, 2017
- Vision Update 2040, Solid Waste Management Scenario Planning, Scott Watershed Management Organization Scenario Planning, Scott County, MN, 2017
- Community Action Partnership of Hennepin County, St. Louis Park, MN 2017
- The Greater Lima Region, OH, 2016 - 2017
- US Midwest Agriculture-Scenarios of the Future, University of Minnesota, 2016 - Present
- City of San Diego, California, 2016 - Present
- Community Visioning, Town of Hilton Head Island, SC, 2016 - Present
- Task Force Lima, Allen County, OH, 2016 - 2017
- Economic Development Strategy Edina Chamber of Commerce, MN, 2016-2017
- Vision Edina, Edina, MN, 2014-2015

#### RELEVANT PUBLICATIONS

- Waseca Vision 2030 Community Vision and Strategic Action Plan, Waseca, MN 2018
- NHADEC Strategic Action Plan, NH, 2018
- The Next Industrial Revolution, Future iQ, 2017
- NHADEC Strategic Planning Think Tank Report, NH, 2017
- Waseca Vision 2030 Scenario-Based Think Tank Workshop Report, Waseca, MN, 2017
- Scott County 2040 Vision Update Report, Scott County, MN, 2017
- Scott County Solid Waste Management Scenario-Based Planning Workshop Report, Scott County, MN, 2017
- SWMO Scenario-Based Planning Workshop Report, Scott County, MN, 2017
- CAP-HC Scenario-Based Think Tank Workshop Report, Hennepin County, MN, 2017
- Propel San Diego Scenario-Based Think Tank Workshop Report, San Diego, CA, 2017
- Economic Development Strategy, Edina Chamber of Commerce, Edina, MN, 2017
- Edina Chamber of Commerce Stakeholder Engagement Analysis, Edina, MN, 2017
- An Innovation Framework for the Greater Lima Region, OH, 2016
- Industry Cluster and Economic Impact Analysis, Edina, MN, 2016
- Future of Food, Future iQ, 2016

#### HEATHER BRANIGIN

heather@future-iq.com

## 4.0 Past Projects

### 4.1 Six Similar Projects with References

Future iQ has completed and is currently working on several similarly-complex projects. We are currently working on a Strategic Plan for Waseca County in Minnesota, as well as a Strategic Roadmap for the Town of Hilton Head Island in South Carolina. These reports will be available once the projects are complete this month. Below are six recently completed strategic visioning and planning reports produced by Future iQ.

#### 4.1.1 City of Edina, Minnesota (2017 and 2014-2015)

##### **Nodes and Modes: Bridging Between Vision and Planning (2017)**

In April 2017, Future iQ facilitated two planning sessions that aimed to bridge the gap between the City's earlier vision project and its upcoming 2018 Comprehensive Plan update. Two community workshops were held including a 'Big Ideas' session reaffirming and further exploring the City's vision priorities, as well as a 'Big Picture' session incorporating the 'Big Ideas' into concrete planning for the Comprehensive Plan. Time-lapse video and innovative report graphics were highlights of this project.

<http://future-iq.com/project/nodes-modes-city-edina-usa-2017/>



##### **Vision Edina, Edina, Minnesota (2014-2015)**

Future iQ was contracted by the City of Edina 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. This innovative community visioning and engagement process was set within the context of a major North American metropolitan region incorporating the twin cities of Minneapolis-St. Paul. <http://future-iq.com/projects/vision-edina/>



**Contact:** Scott Neal, City Manager  
City of Edina  
4801 W. 50<sup>th</sup> Street, Edina, MN 55424  
Tel: 952-826-0401  
Email: [sneal@edinamn.gov](mailto:sneal@edinamn.gov)

#### 4.1.2 Allen County, Ohio (2016-2017 and 2015)

##### Greater Lima Region Collaborative Growth Plan (2016-2017)

Future iQ was contracted to lead the US Department of Defense, Office of Economic Adjustment funded Phase 2 of this project. This contract includes 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. This project produced a Collaborative Growth Plan for the region. <http://future-iq.com/project/greater-lima-region-2016/>



##### Task Force Lima, Ohio (2015)

Future iQ was contracted to design and lead the US Department of Defense, Office of Economic Adjustment funded Phase 1 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. <http://future-iq.com/project/task-force-lima/>



**Contact:** Jeff Sprague, President/CEO  
Allen Economic Development Group  
144 S. Main Street, Ste. 200, Lima, OH 45801  
Tel: 419-222-7706  
Email: [Spraguej@aedg.org](mailto:Spraguej@aedg.org)

#### 4.1.3 Moosehead Lake Regional 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. <http://future-iq.com/project/moosehead-lake-region-maine-usa-2016-17/>



**Contact:** Donna L. Moreland  
Destination Development Specialist  
Maine Office of Tourism  
59 State House Station, Augusta, ME  
Tel: 207-624-9808  
Email: [Donna.Moreland@maine.gov](mailto:Donna.Moreland@maine.gov)

#### 4.1.4 Texarkana, Texas (2015)

Precipitated by concerns regarding workforce alignment and the future of the Red River Army Depot, 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.

<http://future-iq.com/project/texarkana-defense-project-texas-usa/>

**Contact:** Bart Spivey, Business Development Project Manager  
Workforce Solutions Northeast Texas  
911 N. Bishop Bldg A., Wake Village, TX 75501  
Tel: 903-794-9490 ext. 513  
Email: [Bart.spivey@netxworks.org](mailto:Bart.spivey@netxworks.org)



#### 4.1.5 New Hampshire Aerospace and Defense Consortium, New Hampshire, (2017-2018)

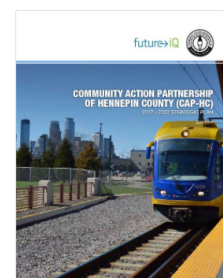
Future iQ was contracted by the State of New Hampshire to develop a five-year strategic plan and roadmap for the statewide nonprofit, New Hampshire Aerospace and Defense Export Consortium (NHADEC). Funding was provided by the Department of Defense, Office of Economic Adjustment. The work included scenario planning and visioning, stakeholder engagement and the production of a long-term strategic plan and roadmap that detailed and prioritized opportunities and challenges that affected NHADEC's interests and capabilities. <http://future-iq.com/project/aerospace-defense-export-consortium-strategy-development-new-hampshire-usa-2017/>



**Contact:** Nathaniel C. Nelson, International Trade Officer  
Division of Economic Development  
Department of Business & Economic Affairs  
State of New Hampshire  
Tel: 603-271-8444  
Email: [Nathaniel.Nelson@livefree.nh.gov](mailto:Nathaniel.Nelson@livefree.nh.gov)

#### 4.1.6 Community Action Partnership of Hennepin County, Minnesota (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. <http://future-iq.com/project/community-action-partnership-hennepin-county-minnesota-usa-2017/>



**Contact:** Kim Mongoven  
Director of Planning & Development  
Community Action Partnership of Hennepin County  
8800 Highway 7, Ste. 401, St. Louis Park, MN 55426  
Tel: 952-697-1325  
Email: [kmongoven@caphennepin.org](mailto:kmongoven@caphennepin.org)

## **4.2 Relevant Projects**

### **4.2.1 Town of Hilton Head Island, South Carolina (2016-present)**

Future iQ has been engaged to create a long-term comprehensive community vision that will guide the community of Hilton Head Island for the next 10-20 years. The island has a highly-developed tourism industry as well as significant historical significance involving unique cultural groups that must be balanced in the development of the community vision. This project will involve 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 and implementation plan for the vision once created.

<http://future-iq.com/project/hilton-head-island-south-carolina-usa-2016-17/>

### **4.2.2 City of San Diego, California (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. This area is home to the largest concentration of military assets in the world. 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. <http://future-iq.com/project/city-san-diego-california-usa-2016-17/>

### **4.2.3 Rural Community Assistance Partnership, Washington, D.C. (2018-present)**

Future iQ has been contracted to lead the development of a comprehensive organizational strategic action plan that will bring a more holistic approach to assisting rural communities through expanded economic development opportunities for the Rural Community Assistance Partnership (RCAP). The project will involve a Benchmark Analysis, visioning and nationwide stakeholder engagement, and the production of a three-year strategic plan that details and prioritizes opportunities and challenges in a strategic roadmap.

### **4.2.4 B.E.S.T. of Waseca County, Minnesota (2016-present)**

In collaboration with the firm of LHB, Future iQ has been 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 will involve a Benchmark Analysis, communications plan, extensive community engagement and data collection and visualization. The resulting vision, strategic action plan will provide 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/>

#### **4.2.5 City of Wayzata, Minnesota (2017-present)**

Future iQ has been contracted by the City of Wayzata to develop a new Community Vision for that builds on its recent Lake Effect project and creates clear city-wide priorities for the future. The visioning process will involve extensive community engagement and a scenario-based planning methodology that will help the community look forward to the year 2040. The intent is for the resulting vision and priorities to be innovative, inclusive and sustainable and to provide a roadmap to guide and inform Wayzata's upcoming comprehensive planning process. <http://future-iq.com/project/city-wayzata-minnesota-usa-2017/>

#### **4.2.6 Katahdin Collaborative, Maine (2018-present)**

Future iQ was recently engaged to produce a citizen-driven Regional Vision Plan for the Katahdin Region of rural Maine. The project will involve extensive background research and analysis, community and stakeholder engagement, focus groups, scenario-planning, data collection and visualization, as well as the development of a core values statement to guide the final Katahdin Collaborative Regional Vision Action Plan.

#### **4.2.7 Oshkosh Initiative, Wisconsin (2014-2016)**

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. <http://future-iq.com/project/fox-valley-wisconsin/>

#### **4.2.8 Mediterranean Ports Project, Italy/France (2015)**

The ongoing goal of the EU Programme Maritime is to improve cooperation between border areas in terms of accessibility, innovation, enhancement of natural and cultural resources and integration of resources and services to increase regional competitiveness. Future iQ was contracted to implement a future orientated scenario-planning methodology with broad cross-sectional representatives from the various port cities within four large sub-regions producing individual reports for each of the four regions of study. 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/>

### 4.3 Additional Relevant Experience

Below are several relevant current and past projects that illustrate the breadth of our experience. To see a complete inventory of Future iQ's specialized projects, please visit: <http://future-iq.com/featured-projects/>.

- **Snohomish County, Washington** (2017-2018). Future iQ was contracted to conduct the first phase of this project. Building off the 2018-2022 Snohomish Strategic Tourism Plan, Future iQ will perform background research including an online regional industry participant survey 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. <http://future-iq.com/project/snohomish-county-regional-destination-development-washington-usa/>
- **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/>
- **University of Minnesota-Twin Cities** (2016-present). Future iQ is working on a collaborative research project with the University of Minnesota to explore 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 bio-economy in the Midwest. <http://future-iq.com/project/u-s-midwest-agriculture-scenarios-future-2016-17/>
- **Scott County, Minnesota** (2017). Future iQ was engaged to work on two County projects. The first project involved two half-day scenario-planning workshops for the Environmental Services Department. These workshops each separately explored scenarios and helped to prioritize action steps for Scott County Waste Management and the Scott Watershed Management Organization. The second project involved facilitating Scott County's 2040 Vision Update Workshop. All three workshops involved the exploration of future trends that affect the County and a prioritization of focus areas in preparation for department updates to the Comprehensive Plan. <http://future-iq.com/project/scott-county-minnesota-usa-2017/>
- **National Congress of American Indians, Arizona** (2016-2017). Production of a unique version of the Future Game built around the interface and engagement between researchers and Native American communities and leaders. <http://future-iq.com/project/national-congress-american-indians-usa-2016/>
- **Travel Oregon, Oregon** (2016-present). Travel Oregon embarked on a regional tourism planning process and over the past two years 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/>

- **Travel Oregon's Tourism Studios, Oregon** (2009-2016). The Oregon Rural Tourism Studio program is a training and capacity building program designed to assist Oregon communities that have identified tourism development as one of their priority economic development strategies. The program assists communities with the development of their tourism industry in a way that will help stimulate the local economy, protect and enhance local natural and cultural resources, and foster pride amongst participants. <http://future-iq.com/projects/rural-tourism-studio-oregon-usa/>
- **Griffith Foods, Illinois** (2015-2017). Griffith Foods is a global food ingredient company based in the Midwest with operations in over 20 countries. Future iQ has been working with the global leadership team to build the strategic foresight capacity and undertake scenario planning work, as the company undertakes a major refocus of its global operations. <http://future-iq.com/project/griffith-foods-chicago-usa-2016/>
- **Nebraska Views of the Future, Nebraska** (2015-2016). Engaged by the Nebraska Economic Development Association, Future iQ presented a future-planning workshop to over 70 stakeholders as part of a professional development program. <http://future-iq.com/project/nebraska-views-of-the-future-usa/>
- **Australian Grain Industry** (2009-2015). Funded by the Grains Research and Development Corporation, Future iQ was engaged to conduct scenario planning, network mapping, and additional research. <http://future-iq.com/project/australian-grain-industry/>
- **Kewaunee Region, Wisconsin** (2013-2014). Following the announced closure of a regional nuclear power station, Future iQ was contracted to design and lead a three-county long-term regional planning effort as part of the economic response strategy. This work included stakeholder engagement, future planning and focus group sessions involving over 400 people. A comprehensive vision-based regional action plan has been developed to align the region and key organizations around economic innovation and collaboration. <http://future-iq.com/projects/kewaunee-nuclear-power-station-closure/>
- **The Community Progress Initiative, Wisconsin** (2003-2009). The Future iQ team were the key designers and facilitators of this initiative, which was created to address the substantial local economic impact of the downturn in the paper manufacturing industry. This region is home to several very large paper making businesses, and is a renowned Cranberry producing region. The Community Progress Initiative played a role to define a new vision, and act as a catalyst in shifting culture from dependent to self-reliant, building new and engaged civic processes. <http://future-iq.com/projects/community-progress-initiative-wisconsin-usa/>
- **Mountains of León – Northern Spain** (2013-14). This region of 60,000 is undergoing unemployment, youth outmigration, an aging population and a lack of industry. While it

straddles the famous Camino Trail, the region is not yet maximizing this advantage. Future iQ worked with local organizations to create a process that brought future thinking to the region and enabled people to work together as a community to shape the future.

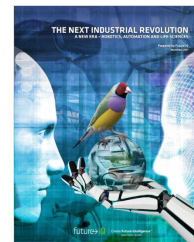
<http://future-iq.com/projects/mountains-of-leon-forging-the-future-leon-spain/>

- **Government of Alberta, Canada (2009-014).** Future iQ worked with the Government of Alberta on a range of projects including regional planning, developing, and facilitating the development of the Small Business Strategy, Research and Facilitation publications and Regional Workshops as part of the Service Provider Network for the Province. <http://future-iq.com/project/regional-and-economic-development-in-alberta/>
- **Future West Cork – Ireland (2009-12).** This regional visioning project drew together stakeholders from across the West Cork Region (pop >100,000). It explored the long-term future and designed, facilitated and implemented an intensive engagement process giving 800 people comprehensive input. This region is one of the key food destination regions in Western Europe. <http://future-iq.com/projects/future-west-cork/>

#### 4.4 Foresight Experience

Future iQ has considerable experience in producing global foresight publications, research and Think Tanks. These research projects help build understanding of future trends impacting communities, workforce, economic development and associated economies. Below is a list of recent foresight publications, as well as a link to Future iQ's 2012 global foresight conference.

- **The Next Industrial Revolution (2017)**  
This research explores the breadth of the Next Industrial Revolution and analyzes its potential implications for all areas of our lives. <http://future-iq.com/resources-and-reports/reports-2/>
- **The Future of Manufacturing (2016)**  
This research analyzes and discusses the key trends that are impacting the global manufacturing sector. <http://future-iq.com/project/future-manufacturing-2016/>
- **The Future of Food (2016)**  
This research examines a range of critical catalysts of change relating to the global food supply chain and the potential impacts upon human health, the environment and food security. <http://future-iq.com/project/future-food-2016/>



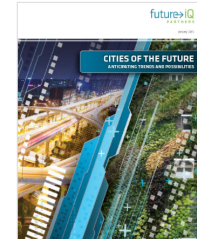
- **Economics of Collaboration (2015)**

This research links together the theory of collaborative behavior with real world experiences around building collaborative planning and action. <http://future-iq.com/project/economics-of-collaboration/>



- **Cities of The Future (2014-15)**

This publication examines future trends and possibilities in city planning and development. <http://future-iq.com/project/cities-of-the-future/>



- **Global Think Tank – Windsor Castle, UK (2012)**

Future iQ hosted and facilitated a global consultation entitled, 'Building Sustainable Regions in Today's World', at St Georges House, Windsor Castle. <http://future-iq.com/projects/st-georges-house/>



## 5.0 Project Timeline

The following chart outlines key stages and suggested periods of activities. This timeline reflects the relative emphasis of activity and is flexible depending on the needs of Coppell. Work on some key deliverables will occur in parallel allowing the stages to be completed within the project timeline.

Key Phases	Key Deliverables	M	A	M	J	J	A	S	O	N	D	J
<b>Phase 1:</b> Initial Planning and Background Research	Initial planning, meetings and schedule											
	Background research on key tasks, trends and studies											
	Benchmark Analysis Report											
<b>Phase 2:</b> Future Scenarios and Engagement	Pre-Think-Tank surveys											
	Coppell Future Think-Tank Workshop											
	Scenarios of the Future Report											
	Community and stakeholder engagement											
	Engagement support training											
	Surveys, data collection and analysis											
	Data visualization platform											
	Community and Stakeholder Analysis Report											
<b>Phase 3:</b> Draft Coppell 20Next Plan	Think Tank Reconvene											
	Focus Groups											
	Draft Coppell 20Next Plan Framework											
	Initiatives and prioritization matrix											
	Roadmap and key measures											
<b>Phase 4:</b> Coppell 20Next Plan Finalization and Presentations	Final Coppell 20Next Plan											
	Graphics and visuals											
	Presentation Coppell 20Next Plan to City Council and Staff											
	Community presentations (3) of Coppell 20Next Plan											

## 6.0 Cost Proposal

Future iQ operates on a 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 City of Coppell will provide venues for workshop sessions and presentations, as required.

Key Phases	Key Components	Cost
<b>Phase 1:</b> Initial Planning and Background Research	<ul style="list-style-type: none"> <li>Initial planning, meetings, and schedule</li> <li>Background research on key tasks, trends and studies</li> <li>Benchmark Analysis Report</li> </ul>	\$3,000 \$5,000 \$6,000
<b>Phase 2:</b> Future Scenarios and Engagement	<ul style="list-style-type: none"> <li>Pre-think tank surveys</li> <li>Coppell Future Think Tank workshop</li> <li>Scenarios of the Future Report</li> <li>Community and stakeholder engagement</li> <li>Engagement support training (optional)</li> <li>Surveys, data collection and analysis</li> <li>Data visualization platform</li> <li>Community and Stakeholder Engagement Report</li> </ul>	\$4,000 \$12,000 \$6,000 \$8,000 \$2,000 \$34,000 \$7,000 \$6,000
<b>Phase 3:</b> Draft Coppell 20Next Plan	<ul style="list-style-type: none"> <li>Think Tank Reconvene to develop strategic action areas and priorities</li> <li>Focus Groups to develop roadmap and key measures</li> <li>Draft Coppell 20Next Plan Framework</li> <li>Initiatives and prioritization matrix</li> <li>Roadmap and key measures</li> </ul>	\$6,000 \$4,000 \$10,000 \$3,000 \$4,000
<b>Phase 4:</b> Coppell 20Next Plan Finalization and Presentations	<ul style="list-style-type: none"> <li>Final Coppell 20Next Plan</li> <li>Graphics and visuals including streetscape renderings</li> <li>Final presentation of Coppell 20Next Plan to City Council and Staff</li> <li>Community presentations (3) of Coppell 20Next Plan</li> </ul>	\$12,000 \$7,000 \$3,000 \$4,500
<b>Total Fees &amp; Expenses</b>	<b>FIXED PRICE PROPOSAL</b>	<b>\$146,500</b>

### Proposed payment schedule:

- 20% on signing of contract
- 20% at completion of phases 1, 2, 3 and 4

**Please note** that the proposed schedule and budget are flexible, based on the needs of the City of Coppell. We are open to scaling and modifications as needed.

## 7.0 Conflict of Interest Questionnaire

This form is not applicable to Future iQ, Inc. Future iQ does not have any business relationship with a local government entity in the State of Texas.