

**NOTICE OF JOINT STUDY SESSION**  
OF THE  
UNIVERSITY CITY CITY COUNCIL  
AND THE ECONOMIC DEVELOPMENT RETAIL SALES TAX BOARD

**Location Changed to HPCC**

Public Notice is hereby given that a Joint Study Session of the City Council of University City and the Economic Development Retail Sales Tax Board (EDRSTB) held **Tuesday, September 17, 2019, at 6:00 p.m.**, the Heman Park Community Center (HPCC) 975 Pennsylvania, University City, MO.

**AGENDA**

Requested by the City Manager

1. Meeting called to order
2. Presentations by finalist consultants to prepare an Economic Development Strategic Plan
  - TIP Strategies
  - The i5 Group
  - Future IQ
3. Adjournment

This meeting is OPEN to the public.

Reposted: this 12<sup>th</sup> day of September, 2019

LaRette Reese  
City Clerk





# ECONOMIC DEVELOPMENT STRATEGIC PLAN

A PROPOSAL FOR UNIVERSITY CITY, MISSOURI  
MAY 2019

May 8, 2019

Libbey Tucker  
Director of Economic Development  
City of University City  
6801 Delmar Blvd.  
University City, MO 63130

Dear Ms. Tucker:

TIP Strategies is pleased to present our proposal for an economic development strategic plan for the City of University City. As you evaluate proposals, we invite you to consider the following:

- ❖ **We have an extensive track record of successful engagements.** Since 1995, TIP has completed more than 400 engagements in 39 states and 5 countries. Our portfolio includes extensive experience preparing economic and workforce strategies for major metropolitan areas. Examples of our recent and current work include the preparation of an economic development strategy for the City of Fort Worth; a skills gap assessment for jobs in the life sciences and advanced manufacturing industries in the El Paso area; a collaborative framework for addressing workforce challenges in the Austin area; and a target industry analysis focused on establishing programs to drive business retention, recruitment, expansion, and startup activities for the newly formed Delaware Prosperity Partnership.
- ❖ **We appreciate the issues facing municipalities in the orbit of major metro areas.** TIP has partnered with the National League of Cities (NLC) to create and launch the first of its kind Economic Development Summit Pilot program. The day-long summit is designed to gather regional elected leaders, government officials, and nonprofit and educational leaders to generate discussions about collaborative regional economic development best practices, methods for addressing areas of concern, and opportunities for the host community to collaborate regionally. The pilot program will build on the work of NLC's First Tier Suburbs Council and will leverage TIP's long history of working in metropolitan and suburban areas across the US. Findings from the initiative, which focuses on the Kansas City area, will be showcased at the NLC's City Summit in San Antonio in November.
- ❖ **We understand the importance of social equity and inclusive planning practices.** A community-wide strategy cannot be successful by focusing only on high-skills, high-wage sectors in vibrant parts of the region. Effective strategies seek to benefit all residents by building pathways and opportunities for economic and career advancement across the spectrum of skills and socioeconomics. Our recent work for the Capital Area Workforce Board created a common agenda and collaborative framework for improving economically disadvantaged residents' access to better economic opportunities in the Austin area. TIP's work

in the Minneapolis-St. Paul region focused on identifying economic development strategies that benefit market-challenged areas and lower-skilled workers, as well as the region as a whole.

The TIP team is excited by the prospect of working with you on a blueprint to guide economic development activity in University City. We appreciate the opportunity to present our firm and our team members, and we invite you to contact our references.

Please feel free to call me at 512.343.9113 if you have any questions concerning our submittal.

Sincerely,

A handwritten signature in black ink, appearing to read 'Tracye McDaniel', with a stylized, cursive flourish at the end.

Tracye McDaniel  
President

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# SUMMARY

TIP Strategies, Inc. (TIP) is submitting this proposal to act as the consulting team for the preparation of an economic development strategic plan. Our team members are experienced in 1) leading economic development planning projects across the United States and internationally; 2) identifying appropriate target industries and designing effective marketing strategies to recruit them; 3) crafting talent retention, development, and attraction strategies; and 4) assisting with the implementation of economic development plans for cities, counties, regions, and states.

During more than two decades in business, we have worked with a range of clients to develop innovative, publicly supported economic development strategies. Our team members have produced numerous strategic economic assessments, economic base analyses, workforce analyses, and target sector analyses, all with input from the client and from stakeholders, community leaders, business owners, and residents. Representative projects include the following:

- City of Fort Worth, TX – *Economic Development Strategic Plan*
- Delaware Business Roundtable/State of Delaware – *Delaware Growth Agenda and Business Plan for Delaware Prosperity Partnership*
- Tampa Bay Partnership – *Employer-led Regional Workforce Initiative*
- Greater Green Bay Chamber, WI – *Economic Development Strategic Plan*
- Travis County, TX – *Economic Development Strategic Plan*
- State of Michigan / DTE Energy – *Workforce Research and Analysis*
- Capital Area Workforce Board (Austin, TX) – *Master Community Workforce Plan*
- Greater MSP (Minneapolis-St. Paul) – *Center Cities Economic Development Playbook*
- City of Fort Collins, CO – *Economic Health Strategic Plan and Regional Workforce Strategy*
- Northwest Indiana Forum – *Economic Development Strategic Plan*
- Borderplex Alliance (El Paso, TX) – *Skills Assessment: Life Sciences, Advanced Manufacturing, IT*
- Florida's Great Northwest (with Haas Center at the University of West Florida) – *Northwest Florida Forward*
- South Carolina I-77 Alliance – *Regional Workforce Study* and county profiles
- Bismarck-Mandan Development Association, ND – *Target Industry Analysis*
- Savannah River Site Community Reuse Organization, SC – *Regional Workforce Study*
- Oregon Talent Council – *Oregon Talent Report*
- Washington Dept. of Commerce – *Organization and Operations Plan for the Washington Military Alliance*
- Massachusetts Dev. Finance Authority (MassDevelopment) – *Defense Industry Economic Diversification Study*
- Greater Houston Partnership, TX – *Addressing Houston's Middle Skills Job Challenge*
- East Central MI Prosperity Region – *Centers of Excellence Action Strategy and Regional Prosperity Strategy*
- Asheville-Buncombe County, NC – *AVL 5x5 Vision 2020*
- City of Las Vegas and Clark County, NV – *Comprehensive Economic Development Strategy (CEDS)*
- US Virgin Islands – *Targeted Competitive Industry Study*



Headquarters

2905 San Gabriel St, Suite 309

Austin, Texas 78705

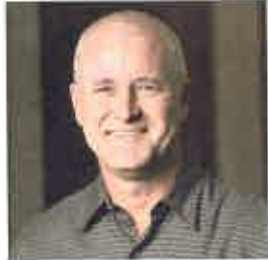
PH 512.343.9113

FX 512.343.9190

[www.tipstrategies.com](http://www.tipstrategies.com)

## Our Leadership

TIP's principals are ideally suited to assist the City of University City on this project.



**TOM STELMAN**  
CEO/FOUNDER

Tom brings a wealth of experience working with communities and businesses. As developer of TIP's model of Talent, Innovation, and Place, he has helped clients identify sustainable strategies to promote workforce and economic health.



**TRACYE MCDANIEL**  
PRESIDENT

As a widely recognized strategist with experience in all facets of economic development and travel marketing, Tracye has earned a reputation for creating mutually beneficial partnerships across a broad spectrum of industries.



**JON ROBERTS**  
MANAGING PARTNER

Jon is a nationally recognized leader in regional economic development. He has overseen projects throughout the US, as well as in Europe and Asia and is a frequent speaker for the International Economic Development Council.



**JEFF MARCELL**  
PRINCIPAL

Jeff leads high-profile national consulting engagements and provides input from the practitioner's point of view. Prior to joining the firm, he spent a decade leading the Economic Development Council of Seattle and King County.

Our principals are supported by a staff of analysts and consultants experienced in managing economic development projects similar in scope to the requested work. The TIP team also includes a network of associates and partners in a wide range of disciplines whose skills can be brought to bear on this project.

## Our Advantage

Our team is well qualified to serve as the contractor for this work.

- **We have a long history of successful engagements, including work in Missouri.** Since 1995, TIP has completed more than 400 engagements across the country. Projects completed in the state include the preparation of economic development strategies for Jefferson City, Iron County, and Christian County. We are currently working with the Mid-America Regional Council (MARC), based in Kansas City, Missouri, as part of the National League of Cities (NLC) Economic Development Summit Pilot program. MARC was selected from among more than a dozen applicants to participate in this initiative. The Economic Development Summit, scheduled for mid-July, will present the results of a collaborative research effort between TIP and MARC focused on identifying the region's housing affordability issues and proposing solutions to address the identified challenges.



❖ **We have been active in dozens of major metropolitan areas.**

We have extensive experience working with a range of players in metropolitan areas including regional groups, cities, and suburbs. Most recently, we prepared the first-ever economic development strategic plan for the City of Fort Worth. The plan provides a strategic framework for channeling growth in specific geographic areas and redefining the City's existing target industries. Engaging Fort Worth's regional partners to create a context for shared decision making, resource allocation, and collaborative implementation was an important aspect of the plan. Our plan for Auburn, Washington, located in the Seattle metropolitan area, helped local leaders get behind a more aggressive approach to economic development. During the first two years of the plan's implementation, the City has supported and encouraged several corporate relocation and expansion projects, representing an increase of more than 1,000 jobs in targeted sectors, as well as the announcement of three major hotel developments (Windham, Hilton, and Holiday Inn), and several new restaurants.

*[TIP] worked collaboratively with our CEOs and stakeholders throughout Delaware to ensure that the end product – the Delaware Growth Agenda – was not only data-driven and substantive, but politically sensitive and respectful to the varied interests in our state. The result was a plan that was on time, on budget and on point.*

*Bob Perkins, Exec. Director,  
Delaware Bus. Roundtable*

❖ **We have direct experience creating collaborative plans aimed at addressing economic equity challenges.**

We recently completed a countywide comprehensive economic development strategy for Travis County, Texas, home to the city of Austin. The plan laid out a new approach to economic development in the county, with strategies aimed at reducing or eliminating the county's widening economic gap. Our recent work for the Capital Area Workforce Board created a common agenda and collaborative framework for improving economically disadvantaged residents' access to better economic opportunities. The Center Cities Playbook we prepared for the Minneapolis-St. Paul region focused on identifying economic development strategies that will benefit market-challenged areas and lower-skilled workers, as well as the region as a whole. Over the course of several engagements, we have worked with Fort Collins, Colorado, to re-align their Economic Health Strategic Plan with the city's focus on environmental and social sustainability. This work has included identifying metrics that support social equity and using targeted investments to achieve social equity goals, such as an entrepreneurial hub purposely located as a catalyst in one of the more distressed areas of the city.

❖ **Our strategies emphasize the role of innovation in creating healthy economies.**

Our work for the Greater Green Bay Chamber centered on building a robust ecosystem for innovation and entrepreneurship by expanding the role of the University of Wisconsin–Green Bay and creating greater alignment with the Green Bay Packers organization. In the first year of the plan's implementation, the Chamber was able to make great strides in the implementation of both strategies. In October 2017, the Green Bay Packers and Microsoft announced the launch of TitletownTech, a one-of-a-kind partnership focused on three initiatives: an accelerator aimed at digital technology products and services, an investment fund jointly financed by the Packers and Microsoft, and an 18-week lab that connects established firms with Microsoft's global resources for the purposes of technology development. The planning process also helped galvanize local leaders in the pursuit of an engineering school at the University of Wisconsin–Green Bay (UW-GB). Armed with the

recommendation from our planning process and letters of support prepared by TIP, UW-GB's Chancellor obtained approval to move forward with the initiative, which had been stalled for decades. The Richard J. Resch School of Engineering will begin accepting students starting in the fall of 2019.

*We've very much enjoyed working with [TIP] throughout this entire process. From the discovery work to site visits to this week's presentation, you've been every bit as good as advertised.*

*Brian Ritter, CEC  
President/CEO, Bismarck-Mandan Development Assoc.*

- ❖ **We have worked extensively with stakeholder groups.** Our planning projects are typically guided by leadership teams from multiple areas of interest, including private business, economic development, higher education, and workforce. As a result, we have extensive experience balancing competing interests and identifying shared goals. During our work for the Greater Houston Partnership, our team guided the Regional Workforce Development Task Force in the preparation of a 10-county regional workforce strategy focused on the demand for and supply of middle skills jobs. The task force engaged high-level executives from the region's largest employers, including JP Morgan Chase, ExxonMobil, and AT&T, as well as professionals representing a wide array of public and nonprofit organizations. We also have direct experience facilitating focus groups and public input sessions. As part of a visioning process for the North Iowa Corridor Economic Development Corporation, we conducted an extensive outreach process which was credited with catalyzing positive change in the region before the plan was even finalized. These changes included influencing key transitions in the city's elected leadership and the public approval of bond initiatives critical to the region's future growth.
- ❖ **We have a strong portfolio of talent projects focused on specific sectors and employer needs.** We have a deep understanding of workforce development and approach our projects from the employer's perspective. Our team recently completed a communitywide plan for the Capital Area Workforce Board (which serves the Austin area) to create a demand-driven system for addressing middle skills gaps beginning with three of the region's key economic drivers: healthcare, information technology (IT), and skilled trades. Other current projects with a sector-specific approach include a statewide talent strategy for the Oregon Talent Council (which focuses on the state's strengths in bioscience, IT, advanced manufacturing, healthcare, and energy), and a skills gap assessment for jobs in the life sciences and advanced manufacturing industries in the El Paso area. The middle-skills strategy we prepared for the Greater Houston Partnership was a direct response to employers facing worker shortages along the Gulf Coast due to the region's rapid expansion and the unprecedented level of new facilities slated for the region. Other examples of talent strategies focused on specific industry sectors include an analysis of nuclear, manufacturing, cybersecurity, and medical opportunities for SRSCRO, the organization responsible for economic development in the five-county region surrounding the US Department of Energy's Savannah River nuclear site, and deep dives into three priority sectors (healthcare, manufacturing, and IT) for the greater Fargo-Moorhead region in North Dakota.
- ❖ **We view postsecondary education and training providers as partners in regional competitiveness.** Our consulting team has experience working with communities to determine the best way to leverage their postsecondary education institutions for economic development. Partnerships with universities and colleges in research, development, and applied technology can often be the key to remaining competitive

in the global marketplace. Higher education institutions also play a major role in talent attraction and retention. We have worked with a number of colleges and universities—such as the IC<sup>2</sup> Institute at The University of Texas at Austin; Cornell University; the University of Western Florida; Carleton and St. Olaf Colleges (Northfield, MN); Southern Illinois University-Carbondale; the University of Wisconsin-Parkside; the University of North Texas; Texas A&M University-Commerce; and Lamar University—both as partners and as stakeholders. As a result, we understand that institutions of higher learning are assets that provide significant opportunities for future growth.

- ❖ **We understand the factors that drive private investment.** Our team members have spent decades helping communities and regions across the country identify and attract well-suited target industries. Our approach recognizes that site location decisions consider a range of factors, including the available workforce, the presence of well-prepared industrial sites, a climate that fosters innovation, and a quality of place that will support the retention and recruitment of talent. In addition to our consulting work, we have direct business recruitment experience. At the Economic Development Council of Seattle and King County, TIP principal Jeff Marcell spent a decade leading the organization's efforts to recruit, retain and expand globally recognized companies like Boeing, Google, American Family Insurance, Booking.com, and many others in the Seattle region. TIP also managed the Invest in Texas Alliance, a consortium of Texas economic development organizations and professional service firms interested in helping companies do business in the state. Through the Alliance, TIP marketed directly to target industries in the US and abroad resulting in 15 new locations in Texas, representing over \$3 billion in potential investment.

In short, our team has the analytical capacity, corporate experience, and planning expertise to assist the City and its partners in examining University City's position in the St. Louis region and creating a sustainable and resilient economy. We are excited about the prospect of working on this project and are available to begin work immediately upon agreement of terms.

*TIP works to stay on the cutting edge of economic development nationally, and we rely on them for their insights and their diligence to get things right.*

*Geordy Kacala, Executive Director (former), Racine County Economic Development Corporation*

# CONSULTANT QUALIFICATIONS

TIP is a privately held economic development consulting firm committed to providing innovative strategy solutions for public and private sector clients since 1995. With offices in Austin and Seattle, the firm’s primary focus is economic development strategic planning at the local, regional, and state levels. Specific topics in which TIP has deep experience include workforce, entrepreneurship, target industries, and defense industries/communities. Our methods establish a clear vision for economic growth. Community leaders across the country have embraced the TIP model of Talent, Innovation, and Place to achieve successful and sustainable economies.

## Staffing

At TIP, the work of our consulting team is conducted under the direct supervision of a senior member of the firm. The principal-in-charge is actively involved in every phase. In addition to a principal, a project manager is assigned to each engagement. Each of our project managers has multiple years of experience managing consulting engagements. The principal-in-charge and project manager are supported by analysts, who have extensive experience working with large data sets and preparing thought-provoking and engaging analyses.

The organizational chart below illustrates the typical staffing for our engagements. Beyond the immediate project team, our process includes regular brainstorming sessions that involve the entire firm. At these meetings, project managers present their findings for peer review. We believe our clients benefit from this approach, which engages the full brainpower and expertise of our team in addressing their challenges.

We do not anticipate using any subcontractors for this work.



## Roles & Responsibilities

A summary of team member qualifications, including their role in this work, is provided below.



**TRACYE MCDANIEL**  
*Principal-in-Charge*

Tracye McDaniel, TIP president, will act as principal-in-charge and will serve as the primary point of contact for this work. In this capacity, she will participate in the scoping of the project and provide technical and strategic input during each phase. In addition, she will contribute specific expertise on competitiveness, inclusive development, and tourism. Tracye is a recognized trailblazer in the economic development and travel marketing industry. She has been a trusted advisor to CEOs, nonprofits, public organizations and private enterprises for more than three decades. As a widely recognized strategist with C-Suite level experience in all facets of the industry, Tracye has earned a reputation of creating mutually beneficial strategic partnerships across a broad spectrum of industries. Prior to joining TIP, Tracye founded McDaniel Strategy Ecosystems and served as president and CEO for two separate state-level marketing and lead-generation organizations: first in New Jersey (where she was appointed by then newly elected New Jersey governor, Chris Christie, and business leaders to serve as the founding CEO of Choose New Jersey) and later in Texas (where she headed up the Texas Economic Development Corporation). Her expertise in international business development and marketing spans more than 50 countries. Tracye also served as executive vice president and COO of the Greater Houston Partnership where she teamed with business leaders to raise more than \$32 million and to devise and execute Opportunity Houston, the organization's successful economic development global marketing and lead generation initiative. She holds a Bachelor of Science in Communications from the University of Texas–Austin.



**JON ROBERTS**  
*Project Advisor*

Jon Roberts will provide input on innovation-related strategies. Jon has been a principal and managing partner at TIP Strategies since 2000. He helped transition the company from its Texas-based site selection practice to a national strategy firm. His portfolio includes planning work from New York to California, with significant regional projects in the Mississippi Delta, Seattle's Puget Sound, and in the Great Lakes area. Prior to joining TIP, Jon was the Director of Business Development first for the State of Washington and then under Governor Ann Richards for the State of Texas. During the transition to Governor Bush's tenure he helped restructure the state's economic development organization and then co-authored the new strategic plan for the State of Texas. Jon also has deep ties to the state of Oregon. He was vice-president with the Oregon Technology Fund and was the lead investor for the Hood River Brewing Company (Full Sail), which continues to hold a prominent place in the craft brewing industry. He also managed two start-up technology companies: Fiberlite Composites and LifePort Inc. LifePort was subsequently acquired by Sikorsky. Jon has served on the boards of several start-up technology companies and on state task forces and gubernatorial committees. He has lectured in business at the University

of Washington, the University of Texas, and was on the faculty at Marylhurst College in Portland, Oregon. Jon was also the founder of a mountain bike company in Portland, Oregon: the Fat Tire Farm, which now operates multiple retail outlets. Born and raised in Germany, Mr. Roberts has traveled extensively throughout Europe and Asia. He received his BA and MA degrees from the University of Hawaii and did post-graduate work at the University of Oregon. He resides in Austin but spends his summer in Bend, Oregon.



**ALEX COOKE**  
*Project Advisor*

Alex Cooke will serve as a project advisor on organizational strategy and implementation. Since joining TIP in 1997, Alex has managed consulting work in more than 20 states and territories—extending from Alaska to the US Virgin Islands. He has a successful track record in project planning, client communications, and public input and has managed a number of large regional planning projects, most recently in Northeast Wisconsin (five counties) and Northwest Florida (13 counties). Alex has also recently played a key role in helping the State of Delaware establish a new public-private partnership (P3) to lead the state’s economic development efforts. His work in Delaware involved articulating the need for a new P3 on behalf of the Delaware Business Roundtable, drafting the recommendations to inform the legislation creating the Delaware Prosperity Partnership, and developing the operations plan to get the new entity up and running. Alex’s other professional experience includes working as a management consultant with MGT of America and as Director of Research and Grants for the International Business Education Program at Texas Tech University’s Rawls College of Business. He is a member of the [Association of Defense Communities](#) and closely tracks the aerospace and defense sector. Alex holds a Master of Public Affairs from the LBJ School of Public Affairs at University of Texas at Austin and a Bachelor of Arts from Texas Tech University.



**JENNIFER TODD**  
*Project Manager  
(Lead)*

Jennifer Todd will serve as project manager for this work and will be responsible for day-to-day client communication, directing project research, and report writing. Jenn has over a decade of experience contributing to transformational work in strategic planning, implementation, and partnership building with a focus on economic development, organizational strategy, urban planning, sustainability, and communications. She has experience with long- and short-term project management in the public and private sector, successfully collaborating with businesses, residents, elected leaders, governmental agencies, and other community organizations to achieve community and organizational goals. Her work has included projects at a variety of scales, from local corridor and neighborhood initiatives to citywide and regional strategies for economic development, land use, and sustainability. Jenn holds a Master of Science, Community and Regional Planning from the University of Texas at Austin and a Bachelor of Arts in History and a Bachelor of Business Administration, with a major in Management, from the University of Georgia.



**ELIZABETH SCOTT**

*Project Manager  
(Support)*

Elizabeth Scott will contribute to project management duties and to the analysis of strategic growth areas. Elizabeth has experience managing a wide range of projects including business recruitment and retention, economic and workforce development strategy, socioeconomic impact studies, and land use studies. She works closely with community, business, and academic leaders to develop comprehensive strategies that improve economic vitality and quality of life. Prior to joining TIP, she spent seven years working in regional economic development, specializing in business recruitment and retention strategy. In addition to her economic development expertise, she has over ten years of combined experience in research and data analysis, project management, and business development. She received a Master of Natural Resources from Virginia Tech and a Bachelor of Arts in History and Sociology from the University of Tampa.



**BRENT MCELREATH,**  
**AICP**

*Planning & Analysis*

Brent McElreath, AICP, will serve in an advisory role for this work, consulting as needed with the principal-in-charge on strategy and the project manager on analysis. Brent has more than 25 years of experience in comparative urban economic analysis of US and international cities. He has managed research teams in both the public and private sectors and has extensive work experience in real estate and infrastructure markets, with a focus on economic and demographic drivers. Brent has authored, co-authored, and edited numerous white papers, articles, and serial reports on global property and infrastructure markets during his career. While at PPR (now CoStar), he supervised the publication of 250+ quarterly property market forecasts. More recently, he served as a Vice President at MSCI, where he designed and implemented reporting systems for global property markets. Brent is an AICP-certified planner and a long-time member of the American Planning Association. He received a Master of Community and Regional Planning and Bachelor of Business Administration in Finance from the University of Texas at Austin.



**KAREN BEARD**

*Lead Analyst*

Karen Beard will conduct data analysis and assist with report writing. Karen has nearly 25 years of experience as a researcher in the public and private sector. Since joining TIP in 2000, she has managed a variety of consulting engagements, with an emphasis on workforce. Relevant projects include the preparation of a talent-focused strategy for the Wired65 Region of northern Kentucky (Louisville area) and a labor market assessment for Clarksville-Montgomery County, Tennessee (Fort Campbell). The latter included an update of the Veteran's Inventory, a mechanism for assessing post-military plans of Fort Campbell personnel separating from service. She has a background in survey research and has taught the data analysis component of the Texas Basic Economic Development Course since 2006. Karen received a Master of Community and Regional Planning and Bachelor of Arts in Sociology from the University of Texas at Austin.

## Selected Projects



### CITY OF FORT WORTH, TX ECONOMIC DEVELOPMENT STRATEGIC PLAN

<b>CHALLENGE</b>	Between 2000-2017, Fort Worth was one of the fastest-growing large cities in the US. The city has cultivated a unique identity and brand that combines rich cultural heritage with an economy driven by industry-leading employers. However, Fort Worth's success has been achieved without a comprehensive, citywide approach for economic development. Without a focused business development effort, residential development has dominated Fort Worth's recent growth. As a result, other communities in the Dallas-Fort Worth metro area are realizing high-profile business expansion projects that elude Fort Worth.
<b>RESPONSE</b>	The City of Fort Worth engaged TIP to create its first ever economic development strategic plan, aimed at enhancing the city's status in the region and nation over the next five years and beyond. First, TIP analyzed the city's economic competitiveness, workforce and industry opportunities, land use, real estate, fiscal landscape, and entrepreneurial ecosystem. Then, Fort Worth was benchmarked against regional, national, and international peers to evaluate its relative advantages. The resulting actionable strategies addressed how to channel future development into specific districts, generate higher income levels and capital investment, strengthen the local tax base, and support a more attractive environment for companies and skilled workers. With input from the business community and local stakeholders, the Economic Development Strategic Plan was positioned to purposefully guide the City's economic development activities.
<b>REFERENCE</b>	Brenda Hicks-Sorensen, CEcD, Assistant Director, Economic Development Dept.   City of Fort Worth, 200 Texas St., Fort Worth, TX 76102   PH 817.870.0154   <a href="mailto:brenda.hicks-sorensen@fortworthtexas.gov">brenda.hicks-sorensen@fortworthtexas.gov</a>
<b>DELIVERABLE</b>	Economic Development Plan, City of Fort Worth (3 volumes)   December 2017 <a href="http://fortworthtexas.gov/edplan/">fortworthtexas.gov/edplan/</a>





## CITY OF AUBURN, WA TEN-YEAR ECONOMIC DEVELOPMENT STRATEGIC PLAN

### CHALLENGE

From its origins as a farming community, Auburn has transformed into a center for industry, serving as home to one of Boeing Commercial Airplanes' most essential fabrication sites and the largest airplane parts plant in the world. The community's commitment to quality of place is demonstrated by the Auburn Environmental Park (a 200-acre passive open space and educational facility located one mile west of downtown) and the attention to detail given to civic spaces in recent downtown redevelopment projects. Auburn's designation as an Innovation Partnership Zone further illustrates the city's forward-thinking approach and demonstrates its focus on economic success through partnerships. Even with all its successes, local leaders understand the only path to a sustainable, healthy economy is through good jobs and a diversified economic base.

### RESPONSE

TIP's scope of work was comprehensive and ambitious and took place over the course of 11 months. The work included an assessment of the city's competitive position, a deep dive into Auburn's real estate market fundamentals, a review of the regulatory environment, a market capacity study, an analysis of retail opportunities, a survey of regional commercial real estate brokers (to document perceptions of Auburn as a place to do business), a target industry analysis, a review of key marketing materials, and organizational recommendations. The plan was organized around four focus areas: *delivery*—a service delivery system for economic development opportunities; *product*—a business climate and a physical environment that foster growth and ensure resiliency; *place*—attractive gateways, corridors, and destinations; and *messaging*—coordinated marketing that elevates Auburn's reputation, internally and externally.

### REFERENCE

Douglas Lein, Manager; City of Auburn Office of Economic Development | 25 West Main Street, Auburn WA 98001-4998 | PH 253.804.3101 | [dlein@auburnwa.gov](mailto:dlein@auburnwa.gov)

### DELIVERABLE

Ten-Year Economic Development Strategic Plan, Auburn, WA | November 2016  
[http://www.auburnwa.gov/Assets/Administration/AuburnWA/Docs/EcDev/Economic Development Strategic Plan.pdf](http://www.auburnwa.gov/Assets/Administration/AuburnWA/Docs/EcDev/Economic%20Development%20Strategic%20Plan.pdf)



## BUDA ECONOMIC DEVELOPMENT CORPORATION (TX) ECONOMIC DEVELOPMENT STRATEGIC PLAN

### CHALLENGE

Situated in the southern portion of the Austin metropolitan area, Buda has experienced tremendous growth. The city was recently ranked as the fastest growing US city among those with at least 5,000 residents as of 2010. This unparalleled growth brings tremendous opportunities, as well as significant challenges. How can the community create a distinct identity for itself while existing as part of the Austin-San Antonio corridor? How can Buda channel and focus future growth as the city approaches full build-out in the next 10 to 20 years? How can community leaders develop a diverse local economy and a sustainable commercial tax base?

### RESPONSE

The Buda Economic Development Corporation (EDC) hired TIP Strategies to chart a proactive and aggressive 10-year economic development strategic plan for the organization and for the community. TIP worked with the EDC and a designated Steering Committee of community and business leaders to evaluate quantitative data and qualitative input from local employers and stakeholders. The team also analyzed Buda's competitive position within the Austin-San Antonio area to build a shared understanding of Buda's future growth potential. The resulting plan outlined a set of strategic initiatives to expand existing industry and business sectors in Buda (including a new medical district), recruit new businesses to the community, and encourage new commercial investment and development. The desired outcomes of these strategies were measurable and include employment growth, business growth, increased capital investment, construction of new commercial space, and growth of the local tax base. Ultimately, the plan provides a blueprint for the Buda EDC to work with the City, the Chamber, and other local and regional partners to align economic development resources to ensure maximum effectiveness.

### REFERENCE

Ann Marie Miller, CEcD, Executive Director, Buda Economic Development Corporation |  
405 East Loop St., Bldg. 100 | PO Box 1650 | Buda, TX 78610 | PH 512.295.2022 |  
[ann@budaedc.com](mailto:ann@budaedc.com)

Image Credit: Buda\_Texas\_Historic\_Downtown by Travis K. Witt via Wikimedia Commons [CC BY-SA 4.0]



## FORSYTH COUNTY, GA ECONOMIC DEVELOPMENT STRATEGIC PLAN

### CHALLENGE

While Forsyth County has many noteworthy assets, their successes masked important barriers for future competitiveness. The county's rapid growth was an indicator of resiliency but was no guarantee of future economic well-being. The county began asking what type of growth was most desirable and how prosperity could be sustained and expanded in the long term. The greatest challenges were the imbalance between commercial and residential tax revenues, the shortage of housing options, inadequate transportation alternatives, a lack of amenities (especially for younger residents) and limited economic development resources and incentives.

### RESPONSE

While Forsyth County has many noteworthy assets, their successes masked important barriers for future competitiveness. The county's rapid growth was an indicator of resiliency but was no guarantee of future economic well-being. The county began asking what type of growth was most desirable and how prosperity could be sustained and expanded in the long term. The greatest challenges were the imbalance between commercial and residential tax revenues, the shortage of housing options, inadequate transportation alternatives, a lack of amenities (especially for younger residents) and limited economic development resources and incentives.

### REFERENCE

James McCoy, President, Cummings-Forsyth County Chamber of Commerce | 212 Kelly Mill Road, Cumming, GA 30040 | PH 770.887.6461 | [jmccoy@cummingforsythchamber.org](mailto:jmccoy@cummingforsythchamber.org)

Image Source: Cummings-Forsyth County Chamber of Commerce



## MATT FOUNDATION BORDERNOMICS ALLIANCE STUDY

### CHALLENGE

The Mexicans and Americans Thinking Together (MATT) Foundation commissioned a study in 2017 to assess opportunities and challenges impacting the ten states sharing the border of Mexico and the United States. TIP's president, Tracye McDaniel, in partnership with The Roy Perryman Group, led a year-long project that involved 12 focus groups on both sides of the US-Mexico border. This initiative brought together 150 business leaders and government officials who contributed insights into the benefits and challenges of cross-border cooperation.

### RESPONSE

The project team recommended the creation of an umbrella organization, the Bordenomics Alliance, to lead binational coordination and partnership initiatives supporting greater prosperity in the US-Mexico border region. The team outlined short and long-term actions for MATT and for the development of the Bordenomics Alliance. Tracye guided this process through the various stages. This included capacity building, leadership recruitment, and coordination across all ten border states. Her role also extended to fundraising, brand development, and strategic advisory services in the formation of the cross-border umbrella organization.

### REFERENCE

Aracely Garcia-Granados, Executive Director, Mexicans and Americans Thinking Together | 329 Old Guilbeau St, San Antonio, TX 78204 | PH 210.270.0300 | [aracely@matt.org](mailto:aracely@matt.org)

Image Source: MATT Foundation

# Work Samples

The following examples of TIP's work have been made available online by our clients.

- 1 **Comprehensive, Countywide Economic Development Strategy, Travis County, TX (Austin)** | February 2019 (pending final approval)  
[www.traviscountytx.gov/images/planning\\_budget/Docs/srp/tc-comp-econ-dev-strat.pdf](http://www.traviscountytx.gov/images/planning_budget/Docs/srp/tc-comp-econ-dev-strat.pdf)
- 2 **Tampa Bay Works: An Employer-Led Regional Workforce Initiative** | January 2019  
[https://www.tampabay.org/sites/default/files/inline-files/Tampa%20Bay%20Works%20Regional%20Workforce%20Initiative\\_01.07.18.pdf](https://www.tampabay.org/sites/default/files/inline-files/Tampa%20Bay%20Works%20Regional%20Workforce%20Initiative_01.07.18.pdf)
- 3 **Assessment of Middle and Advanced Skills: Information Technology, Borderplex Alliance (El Paso area)** | November 2018  
<https://www.borderplexjobs.com/files/html/2018-12-20%20Borderplex%20IT%20Workforce%20Assessment%20FINAL%20%281%29%201.7.19.pdf>
- 4 **Ignite the Region: Northwest Indiana's Strategy for Economic Transformation, Northwest Indiana Forum** | September 2018  
<https://www.nwiforum.org/economic-initiative>
- 5 **Cluster Target Industry Study, I-68 Regional Economic Partnership (WV/MD)** | June 2018  
<http://www.gcedonline.com/resources/gced/pdf/2018-06-27-I68-Target-Industry-Analysis-FINAL.pdf>
- 6 **Regional Prosperity Strategy, Vision North Iowa** | April 2018  
<https://www.visionnorthiowa.com/>
- 7 **Driving the Future (Interstate-41 Corridor Initiative), East Central Wisconsin Regional Planning Commission** | February 2018  
<http://www.ecwrpc.org/wp-content/uploads/2017/03/2018-03-05-I41-Corridor-Regional-Strategy-FINAL.pdf>
- 8 **Economic Development Plan, City of Fort Worth (3 volumes)** | December 2017  
<http://fortworthtexas.gov/edplan/>
- 9 **Assessment of Middle and Advanced Skills: Life Sciences and Advanced Manufacturing, Borderplex Alliance (El Paso area)** | November 2017  
[http://www.borderplexjobs.com/files/html/Borderplex\\_Workforce\\_Assessment2017.pdf](http://www.borderplexjobs.com/files/html/Borderplex_Workforce_Assessment2017.pdf)
- 10 **Economic Impact and Workforce Transition Study, Savannah River Site Community Reuse Organization** | Aug 2017  
<https://www.srsro.org/wp-content/uploads/2017/08/2017-08-21-SRS-Consequences-Analysis-FINAL.pdf>  
<https://www.srsro.org/wp-content/uploads/2017/08/2017-08-15-SRS-Overview-Brochure-FINAL.pdf>
- 11 **Economic Development Strategic Plan, Greater Green Bay Chamber** | May 2017  
<https://www.gretergbcc.org/media/1896/2017-05-08-greter-gb-strategic-plan-final-short.pdf>
- 12 **Master Community Workforce Plan, Capital Area WF Board (Austin, TX)** | May 2017  
<http://www.wfscapitalarea.com/MasterCommunityWorkforcePlan.aspx#95992-master-community-workforce-plan>
- 13 **Florida's Great Northwest, Northwest Florida Forward (with Haas Center for Business Research and Economic Development at the University of West Florida)** | February 2017  
<http://www.northwestfloridaforward.com/page/strategy>

- **Talent 2.0: Regional Workforce Strategy, Fort Collins, CO** | February 2017  
<https://fortcollinschamber.com/program/talent2-0-2017/>
- **Economic Development Strategic Plan, City of Irving, TX** | January 2017  
[http://issuu.com/cityofirving/docs/irving\\_ed\\_strategic\\_plan?e=11107043/49035980](http://issuu.com/cityofirving/docs/irving_ed_strategic_plan?e=11107043/49035980)
- **Ten-Year Economic Development Strategic Plan, Auburn, WA** | November 2016  
[https://www.auburnwa.gov/UserFiles/Servers/Server\\_11470554/File/City%20Hall/Economic%20Development/Economic\\_Development\\_Strategic\\_Plan.pdf](https://www.auburnwa.gov/UserFiles/Servers/Server_11470554/File/City%20Hall/Economic%20Development/Economic_Development_Strategic_Plan.pdf)
- **A Plan for Economic Prosperity, Montgomery County, MD** | November 2016  
<https://www.montgomerycountymd.gov/ep/comprehensiveES.html>
- **Delaware Growth Agenda, Delaware Business Roundtable** | July 2016  
<http://www.dbrt.org/delaware-growth-agenda>
- **Regional Economic Growth Strategy, West Kentucky Workforce Board** | June 2016  
<http://www.westkentuckyfuture.org/s/2016-11-30-West-KY-Future-Plan-FINAL.pdf>
- **Delta Regional Authority, Regional Development Plan III** | April 2016  
[http://dra.gov/images/uploads/content\\_files/DRA\\_RDP3-FINAL\\_APRIL2016.pdf](http://dra.gov/images/uploads/content_files/DRA_RDP3-FINAL_APRIL2016.pdf)
- **Center of Excellence Action Strategy, East Central MI Prosperity Region** | January 2016  
[http://www.emcog.org/rpi\\_excellence.asp](http://www.emcog.org/rpi_excellence.asp)
- **AVL 5x5 Vision 2020 Economic Development Strategic Plan, Asheville-Buncombe County Economic Development Coalition** | December 2015  
[https://www.ashevillechamber.org/wp-content/uploads/2018/01/EDC\\_AVL\\_5x5\\_Vision\\_2020.pdf](https://www.ashevillechamber.org/wp-content/uploads/2018/01/EDC_AVL_5x5_Vision_2020.pdf)
- **Regional Workforce Study, Savannah River Site Community Reuse Org.** | April 2015  
<http://www.srsco.org/wp-content/uploads/2015/04/2015-04-22-SRS-Regional-Workforce-Study-FINAL.pdf>  
<http://www.srsco.org/wp-content/uploads/2015/04/2015-04-16-SRS-Executive-Summary-for-web.pdf>
- **Regional Prosperity Plan and Economic Performance Dashboards, East Central Michigan Prosperity Region** | December 2014  
[http://www.emcog.org/rpi\\_plan.asp](http://www.emcog.org/rpi_plan.asp)  
[http://www.emcog.org/rpi\\_dashboard.asp](http://www.emcog.org/rpi_dashboard.asp)
- **Targeted Competitive Industry Study, US Virgin Islands** | December 2014  
<http://www.usviber.org/wp-content/uploads/2017/03/TIS-2014.pdf>
- **Strategic Plan, Lubbock Economic Development Alliance (TX)** | November 2014  
<http://lubbockeda.org/Lubbock/media/Lubbock/Secondary/2014-11-11-LEDA-Executive-Summary-FINAL.pdf>  
<http://lubbockeda.org/Lubbock/media/Lubbock/Secondary/2015-03-05-LEDA-Strategic-Plan-FINAL.pdf>
- **VISTA 2025 Chester County's (PA) Economic Development Strategy** | October 2014  
<http://pa-chestercounty.civicplus.com/DocumentCenter/View/20778>

# PROJECT WORK PLAN

Our team has an established process for conducting economic development strategy work. Our Theory Into Practice (TIP) planning model combines analytical tools with the latest thinking in economic development, workforce training, and community-based principles to create innovative and publicly supported strategies. In our years of leading consulting projects across the country, this three-phase approach—Discovery, Opportunity, and Implementation—has proven flexible enough to address the variety of challenges our clients face.

## THEORY INTO PRACTICE PLANNING MODEL

Our Theory Into Practice (TIP) planning model combines analytical tools with our team’s understanding of demographic, economic, and cultural trends.



## 1. Discovery

*What is University City’s competitive position in the St. Louis metro area?*

**1.1 Project startup |** Our startup task is a collaborative process designed to lay a strong foundation for the project. It includes the following steps:

- 1. **Kickoff meeting.** The kickoff meeting provides the opportunity to discuss objectives, define success factors, and review the team’s expectations for the engagement. The meeting can be conducted virtually or in person, depending on the specifics of the project.
- 2. **Engagement strategy.** We will work with the City to design an engagement strategy tailored to project objectives. The strategy will consider the methods to be employed (based on the options outlined in Task 1.5), the proposed timing, and the assistance that will be required from the client team.



**1.2 Planning context |** To provide context for our work and ensure our team builds on existing knowledge, we will work with University City to complete several essential tasks during the Discovery phase:

- 1. **Policy framework.** We begin with a review of internal and external reports identified by the client team that are relevant to this work. Insights gained from this step regarding what has worked in prior planning efforts —and what has not—will help shape our recommendations in the Implementation phase.
- 2. **Partners & resources.** To understand the City’s role in the region, we will explore the external partner network that influences economic development in Universal City and the larger metropolitan area. Findings from this scan will provide an overview of the regional landscape that will help refine and

prioritize initiatives, identify resources that could be brought to bear on specific projects, and highlight potential gaps and redundancies.

- **Institutional anchors.** We will work with the City to identify universities, foundations, major employers, and other key players that wield influence, set regional direction, or create momentum in key sectors. As we move through the engagement, particularly during the strategic growth area analysis, we will build on our understanding of these institutions when additional anchors are identified.

**1.3 Assessment** | Our analysts will prepare a market-based analysis of factors that define University City's competitive position in the context of the St. Louis metropolitan area. This analysis will take advantage of available resources and will be tailored to meet project objectives. As requested, the assessment will address the following areas:

- Preparation of a comprehensive demographic profile
- Review of incentives for attracting investment
- Analysis of economic drivers (employers and industries)
- Overview of small business, micro-enterprise, and start-up ecosystem
- Assessment of internal operations (based on information provided by the City)

**1.4 Benchmarking** | Benchmarking can serve a number of purposes, including gauging progress (*Where do I stand relative to my past performance?*); evaluating competitiveness relative to peer organizations (*Who is like me and how do I "stack up"?*); and identifying best practices (*Who do I aspire to be like and what can I learn from them?*). To understand University City's competitive position relative to its peers, we will compile information on an agreed-upon number of similarly situated communities or regions. In addition to providing statistical comparisons, we will provide information on major areas of focus and staffing and budgeting where available. Results of the benchmarking work will contribute to the SWOT analysis and will inform our recommendations in Phase 3.

**1.5 Engagement** | We design a custom input process that engages the appropriate groups for a successful planning effort. Our goal is to design an input strategy that engages the broadest possible constituency, provides meaningful information to the planning process, raises awareness of economic issues, and builds support for the outcome. For this work, we propose the following approach:

- **Roundtables.** Roundtable discussions are the linchpin of our stakeholder input process. They are designed to encourage productive discussions around a targeted set of topics. This approach helps ensure that key stakeholders are engaged in the planning process and that individuals have meaningful opportunities for input. Roundtables are typically conducted with major employers, elected officials, human resources specialists, real estate professionals, and other experts to gather information about future land use plans, regional economic trends, and other insights that will help shape our recommendations.
- **Interviews.** For a select group of stakeholders, we conduct one-on-one or small group interviews. Through this process, we help our clients identify champions who can move initiatives forward and who will be instrumental in the successful implementation of the strategic plan.



- **Public participation.** To expand participation in the process, we can facilitate the use of social media and online surveys. These tools can be effective mechanisms for engaging stakeholders, gathering anecdotal information about assets and challenges, and increasing “buy-in” for the resulting recommendations among the broader community. A specific plan for public input will be determined as part of the project startup task.
- **Perception.** To understand how University City is viewed as a place to conduct business we gather input from key influencers in the development process, including real estate brokers and state and regional economic development allies. If available, our team can also interview a small number of recent prospects—those that have chosen to locate in the city as well as those that ultimately located elsewhere—to understand the factors that affected their decision.

**1.6 SWOT analysis |** The Discovery phase tasks form the basis for the development of an analysis of strengths, weaknesses, opportunities, and threats (commonly referred to as a SWOT analysis). This analysis, in turn, drives the subsequent Opportunity phase of the planning process.

## 2. Opportunity

*What opportunities are likely to have the greatest potential for success?*

**2.1 Strategic growth areas |** Strategic growth areas can include traditional sectors that can be defined using the existing industry classification systems, as well as emerging activities and technologies that do not align neatly with these structures. This more flexible terminology also enables “targeting” efforts to encompass strategic projects that can support multiple areas of activity and enhance innovation and entrepreneurship.

- **Traditional framework.** The use of existing classification systems is the first step in validating target sectors and exploring cross-cutting factors, such as inputs and workforce, based on federally prepared data on industry relationships and staffing patterns. Our analysts will conduct a traditional quantitative analysis of the region’s employment by industry using the NAICS structure at the 3-digit level. This analysis will reveal areas of relative advantage and illustrate historic and projected growth trends for specific industries within each sector. In addition, we will explore regional workforce dynamics as it relates to these sectors.
- **Emerging opportunities.** For emerging growth areas that do not fit neatly within an industrial classification system, we focus on understanding the environments in which promising economic activities can develop and expand. A key element of this work involves exploring how existing infrastructure and assets support the growth areas, including assets and infrastructure related to innovation and entrepreneurship. Our work in Task 1.2 will help shape our understanding in these areas.
- **Validation.** Findings from the prior tasks are validated and clarified by input from major employers, industry experts, and local and regional partners. This qualitative approach serves as a “reality check” while allowing us to identify areas that may not be revealed in the data analysis and pose questions for additional research.

**2.2 Economic nodes** | As part of our analysis of University City’s opportunities, we will evaluate the Neighborhood Economic Nodes identified in the RFP. Based on available data and “windshield tours” of the areas, we will prepare a summary of current conditions, as well as potential challenges and opportunities from an economic development perspective. The goal of this analysis is to provide the City and its partners with information to facilitate implementation in these critical areas. Understanding how these sites relate to other regional strategies and plans will be an essential aspect of the task.

**2.3 Opportunities workshop** | This phase culminates with a workshop designed to engage regional leaders in a focused discussion of potential opportunities identified. The outcome of the workshop will be a preliminary outline of the goals and strategies that will be considered in the Implementation phase. The value TIP adds in such strategy sessions is an understanding of how trends and assets translate into opportunities for our clients.

## 3. Implementation

*What steps, tools, and resources will be required for success?*

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**3.1 Strategic plan** | Using findings from prior phases, coupled with the experience of the consulting team and our knowledge of best practices, TIP will prepare a strategic plan for the City. Together with the implementation matrix (see Task 3.2), the resulting document will provide the City with the specific recommendations and tools needed to implement a long-term economic strategy.

In addition to outlining specific goals and strategies, the plan will highlight key findings from our analytical and qualitative tasks. Diversifying the tax base and creating a resilient and sustainable economy will be important considerations. We anticipate areas of emphasis will include the following:

- Business formation, retention, and expansion
- Target marketing recommendations
- Catalyzing development of Neighborhood Economic Nodes
- Policy and operational changes (if any)
- Inclusive economic development
- Talent development

**3.2 Implementation matrix** | Although it is often overlooked, a strong implementation strategy can be the key to bringing a plan to fruition. TIP will prepare an implementation matrix that accomplishes the following:

- Outlines specific actions to support the recommended strategies
- Identifies responsible parties and potential partnership opportunities
- Establishes timelines and sets priorities
- Includes budget estimates (where applicable) and identifies potential funding sources
- Defines meaningful and realistic performance metrics

**3.3 Final report & presentation** | In addition to finalizing all deliverables, this phase will include a public “rollout” of the plan. In our experience, this step is critical to broad acceptance of the strategies. We will work closely with the City to design a rollout that fits the needs of the project. Potential approaches to this task could include the presentation of the deliverables in a public forum, as indicated in the RFP.

**3.4 Year 1 progress report** | At the one-year anniversary of plan completion, TIP will provide feedback on progress towards implementation of the plan. We anticipate this task would include working with staff to document the status of specific recommendations, highlighting successes, and providing recommendations to adjust and refine the plan as needed. A presentation of findings can also be incorporated. (Travel expenses related to the Year 1 progress report are not included in the estimate of expenses presented in the Fee Information section.)

# SCHEDULE

The TIP team is available to begin this work immediately upon agreement of terms. The following schedule assumes a July 1, 2019, start date and conforms to the 6-month schedule outlined in the RFP. It is intended to provide an overview of the process and can be adjusted to meet the needs of the client.

PHASE/TASK	2019					
	Jul	Aug	Sep	Oct	Nov	Dec
<b>1 DISCOVERY</b>						
1.1 Project startup	①					
1.2 Context						
1.3 Assessment			②			
1.4 Benchmarking						
1.5 Engagement						
1.6 SWOT analysis						
<b>2 OPPORTUNITY</b>						
2.1 Strategic growth areas				③		
2.2 Economic nodes						
2.3 Opportunity workshop				④		
<b>3 IMPLEMENTATION</b>						
3.1 Strategic plan					⑤	⑥
3.2 Implementation matrix						
3.3 Final report & presentation						⑦
3.4 Year 1 progress report						TBD

## MILESTONES:

- ① Kickoff meeting
- ② Draft assessment
- ③ Strategic growth areas identified
- ④ Opportunity workshop
- ⑤ Draft strategic plan
- ⑥ Final strategic plan
- ⑦ Rollout (specific timing and nature to be determined)

# FEE INFORMATION

The fee for completion of this work is \$90,000, with the total of fees and expenses (for up to five trips to the region) not to exceed \$100,000.

## Fees

The breakdown shown below is an estimate and is intended to reflect anticipated level of effort. Adjustments may be made between phases to reflect changing priorities and assignments over the course of the engagement.

PHASE	NUMBER OF HOURS BY POSITION & RATE				TOTAL	
	Principal in Charge \$225	Project Manager \$175	Analyst \$125	Admin. \$55	Hours	Fees
Discovery	20	70	60	20	170	\$25,350
Opportunity	40	100	40	10	190	\$32,050
Implementation	40	100	40	20	200	\$32,600
<b>Total</b>	<b>100</b>	<b>270</b>	<b>140</b>	<b>50</b>	<b>560</b>	<b>\$90,000</b>

## Expenses

Expenses are subject to approval and are billed at cost. They include custom data purchases (if any) and travel and lodging associated with conducting this work. Travel costs represent an estimate based on the number of trips indicated and may assume varying levels of staffing, travel days, etc. The timing and number of trips would be discussed as part of the development of a project work plan.

ESTIMATED EXPENSES		
Travel Expenses (assumes 5 trips)	Per Unit Cost	Total
Airfare	\$500	\$5,000
Parking	\$20	\$500
Car rental	\$50	\$630
Meals & incidentals	\$50	\$1,250
Lodging	\$125	\$2,500
<i>Subtotal travel expenses</i>		\$9,880
Other Expenses (e.g., custom data purchases, graphics/images)		\$100
<b>Total Estimated Expenses</b>		<b>\$9,980</b>

Note: Travel costs associated with the Year 1 progress report are not included in the figures shown. The stated fee includes the cost of printing up to 10 copies of the final report. Additional copies or custom printing would be subject to an additional charge.

# APPENDIX: TIP STRATEGIES RESUMES



tracye@tipstrategies.com

## Expertise

- Intl. and domestic market development
- Business recruitment, expansion and retention
- Econ. devt. marketing
- Tourism devt. & mktng.
- Fundraising strategies
- Workforce strategies
- Regional economic devt.
- State and regional public-private p'ships

## Education

- BS in Communications, Univ. of Texas–Austin

## Affiliations

- Current Board Chair, Intl. Economic Devt. Council
- Member, Texas Economic Development Council
- Fellow, Ford Foundation Regional Sustain. Devt.
- Board of Directors, NJ Chapter of the NAIOP
- Appointed, Council on Innovation
- Board member (former), TX Economic Devt. Corp.



## Tracye McDaniel

President

### Experience

Tracye McDaniel is a recognized trailblazer who has led successful public and private economic development organizations at the state and regional level under five governors in two states. She has been a trusted advisor to CEOs, nonprofits, public organizations, and private enterprises for more than three decades. Tracye has earned a reputation of creating mutually beneficial strategic partnerships among leaders across a broad spectrum of industries.

Prior to joining TIP Strategies, Tracye founded McDaniel Strategy Ecosystems and served as president and CEO for two separate state-level marketing and lead-generation organizations: first in New Jersey (where she was appointed by then newly elected New Jersey governor, Chris Christie, and business leaders to serve as the founding CEO of Choose New Jersey) and later in Texas (where she headed up the Texas Economic Development Corporation). Her expertise in international business development and marketing spans more than 50 countries.

Tracye also served as executive vice president and COO of the Greater Houston Partnership, Houston's most influential business organization. During her tenure she refined and implemented the organization's 10-year strategic plan and teamed with business leaders to raise more than \$32 million and to devise and execute Opportunity Houston, the organization's successful economic development global marketing and lead generation initiative.

Tracye is known for building accomplished teams that get results. She is a sought-after speaker, presenting to national and international audiences, and has published and appeared in global publications and news outlets.

### Significant Projects

- Regional economic development planning and execution: Greater Houston Partnership, Houston, TX
- Economic development marketing and fundraising: Opportunity Houston, Houston, TX
- State-level public-private partnerships for economic development: Choose New Jersey, Princeton, NJ; TexasOne–Texas Economic Development Corporation, Austin, TX
- Economic development marketing: *Texas Wide Open for Business*, Office of the Governor Economic Development and Tourism, Austin, TX
- Tourism development and marketing: *Texas: It's Like A Whole Other Country*, Texas Department of Economic Development and Tourism, Austin, TX



jon@tipstrategies.com

### Expertise

- International and domestic recruitment
- Regional economic strategies
- Venture capital and high-growth entrepreneurship
- Economic development marketing

### Education

- Post graduate research, University of Oregon.
- Master of Arts, Political Philosophy, University of Hawaii.
- Bachelor of Arts, University of Hawaii.

### Affiliations

- Fellow, Washington World Affairs Council, Seattle
- National Development Council Economic Devt. Certification
- Member, Texas Economic Devt. Council
- Member, Intl. Economic Development Council
- Board of Trustees (former), KMFA radio Austin, Texas.

## Jon Roberts

Managing Partner

### Experience

Jon has been a principal and managing partner at TIP Strategies since 2000. He helped transition the company from its Texas-based site selection practice to an economic strategy firm with major national recognition. His portfolio includes planning work from New York to California, with significant regional projects in the Mississippi Delta, Seattle's Puget Sound, and in the Great Lakes area.

Prior to joining TIP, Jon was the director of business development first for the State of Washington and then under Governor Ann Richards for the State of Texas. During the transition to Governor Bush's tenure he helped restructure the state's economic development organization and then co-authored the new strategic plan for the State of Texas.

Jon also has deep ties to the state of Oregon. He was vice-president with the Oregon Technology Fund and was the lead investor for the Hood River Brewing Company (Full Sail), which continues to hold a prominent place in the craft brewing industry. He also managed two start-up technology companies: Fiberlite Composites and LifePort Inc. LifePort was subsequently acquired by Sikorsky.

Jon has served on the boards of several startup technology companies and on state task forces and gubernatorial committees. He has lectured in business at the University of Washington, the University of Texas, and was on the faculty at Marylhurst College in Portland, Oregon. Jon was also the founder of a mountain bike company in Portland: the Fat Tire Farm, which now operates multiple retail outlets.

Born and raised in Germany, Jon has traveled extensively throughout Europe and Asia. He resides in Austin but spends his summer in Bend, Oregon.

### Significant Projects

- Regional economic development planning: Puget Sound Regional Council, WA; Blaine, ID.
- Citywide economic development planning: Fort Collins, CO; Clearwater, FL; Redmond, WA; McKinney, TX.
- Comprehensive economic development strategies: Association of Central Oklahoma Governments; Richmond, VA.
- "Envision Central Texas" project for regional planning in the Austin Metro area.
- State of Texas Strategic Economic Development Plan.
- Recruitment of Matsushita Semiconductor (NSC) to Washington.





alex@tipstrategies.com

## Expertise

- Regional economic development strategies
- Policy analysis
- Defense-dependent communities
- Management consulting
- Aerospace and defense sector

## Education

- Master of Public Affairs, LBJ School of Public Affairs, University of Texas-Austin.
- Bachelor of Arts, Political Science, Texas Tech University.

## Affiliations

- Member, American Association of Defense Communities



# Alex Cooke

Senior Consultant

## Experience

Alex Cooke has managed economic strategy projects for a diverse collection of communities and regions in 20 states and territories—extending from Alaska to the US Virgin Islands—since joining TIP in 1997.

Alex began his career at TIP running the Invest in Texas Alliance, an international marketing consortium that generated dozens of foreign direct investment leads for Texas communities and utilities. Subsequently transitioning to the firm's economic strategy consulting practice, he has produced strategic plans, marketing plans, economic base analyses, and target industry analyses. Today, as a senior consultant, Alex has a successful track record in project planning, client communications, public input, and deliverable production.

In addition to economic development, Alex has both public and private sector experience in the fields of management consulting, higher education, and legislative affairs. His other professional skills include economic, legislative, and policy analysis; grant proposal development; federal grant program administration; and performance measurement. Alex worked as a management consultant with MGT of America and as the director of research and grants for the International Business Education Program at Texas Tech University's Rawls College of Business. At Texas Tech, Alex was responsible for planning and developing grant funding proposals, researching and coordinating funding opportunities, communicating with potential funding agencies and foundations, and administering grant programs.

Alex holds a Master of Public Affairs from LBJ School of Public Affairs at University of Texas at Austin and a Bachelor of Arts from Texas Tech University. He is married and is the father of one son.

## Significant Projects

- State and regional economic development planning: Delaware Business Roundtable and Delaware Prosperity Partnership (statewide); I-41 Corridor, WI; Florida's Great Northwest; Delta Regional Authority (multi-state); Puget Sound Regional Council, WA; Together North Jersey; US Virgin Islands.
- Defense-related work: State of Washington; State of Massachusetts; Fort Campbell Region, TN & KY; Texarkana, TX; Anniston, AL; Wichita Falls, TX; Killeen, TX.
- Citywide economic development planning: Detroit, MI; Las Vegas, NV; Clearwater, FL; Richmond, VA; Corpus Christi, TX; Lubbock, TX; Abilene, TX.
- Countywide economic development planning: Montgomery County, MD; Chester County, PA; Clark County, WA; Mat-Su Borough, AK; Kenosha County, WI.





jenn@tipstrategies.com

### Expertise

- Change Management
- Policy Development
- Project Management
- Stakeholder Engagement
- Strategic Planning

### Education

- Master of Science, Community and Regional Planning, University of Texas at Austin
- Bachelor of Arts, History, University of Georgia
- Bachelor of Business Administration, Management, University of Georgia

### Affiliations

- Congress for the New Urbanism Accredited

## Jennifer Todd

Consultant

### Experience

Jennifer Todd has over a decade of experience contributing to transformational work in strategic planning, implementation, and partnership building with a focus on economic development, organizational strategy, urban planning, sustainability, and communications. She has experience with long- and short-term project management in the public and private sector, working with businesses, residents, elected leaders, governmental agencies, and other community organizations to identify and implement solutions to complex problems.

Prior to joining TIP, she worked for the City of Austin as a Principal Planner leading a citywide land development code rewrite as well as the development of corridor and small area plans; she also contributed to the development of a new departmental strategy. Other experience with the public sector includes leading community engagement and urban planning efforts with the District of Columbia Government's Office of Planning, Department of Transportation, and Department of the Environment. With the International Economic Development Council she designed regional economic development strategies with a focus on disaster recovery, organizational management and workflow structures, and identified strategies for sustainable industry development.

### Significant Projects

- Land Development Code Rewrite, Mapping and Community Engagement, City of Austin, Texas
- Citywide Sustainability Plan and Community Engagement Strategy, District of Columbia Government
- Disaster Recovery Economic Development Strategies: Lake Charles, LA; New Orleans, LA
- Clean Energy Market Analysis and Strategy, Rockefeller Brothers Fund





elizabeth@tipstrategies.com

### Expertise

- Domestic and International Business Recruitment
- Regional Economic Development Strategies
- Project Management
- Target Industry and Industry Cluster Analysis
- Policy Analysis
- Socioeconomic and Fiscal Impact Analysis

### Education

- Master of Natural Resources, Environmental & Land Use Policy, Virginia Tech
- Bachelor of Arts, History and Sociology, University of Tampa

### Affiliations

- Former member of the Port of Portland International Air Service Executive Committee; former vice chair of Leadership Clark County; former member of Clark County Railroad Advisory Board



## Elizabeth Scott

Consultant

### Experience

Elizabeth has experience managing a wide range of projects including business recruitment and retention, economic and workforce development strategy, socioeconomic impact studies, and land use studies. She works closely with community, business, and academic leaders to develop comprehensive strategies that improve economic vitality and quality of life.

Prior to joining TIP, Elizabeth spent seven years with the Columbia River Economic Development Council (CREDC) in Clark County, WA. As the director of business development, she led the business services team executing the strategy for business recruitment, retention, and expansion efforts. In this role, she managed over 20 successful projects including Vigor Industrial, Banfield Pet Hospital Corporate Headquarters, RealWear, and GTMA. Areas of focus include site selection, permitting processes, incentives negotiation, higher education engagement, and workforce development. During her tenure with CREDC, she successfully managed a number of grant programs, including a four-year, \$5 million grant from five federal agencies as part of the Advanced Manufacturing Jobs and Innovation Accelerator Challenge (AMIAC) program for the five county, bi-state Greater Portland-Vancouver Region.

In addition to her economic development expertise, she has over ten years of combined experience in business development, project management, and research and data analysis. Early in her career, she supported BRAC/NEPA projects by providing socioeconomic analysis for environmental assessments and environmental impact statements. She received a Master of Natural Resources from Virginia Tech and a Bachelor of Arts in History and Sociology from the University of Tampa.

### Significant Projects

- Led and supported over 20 successful recruitment and expansion projects, including corporate headquarters relocations
- Led Greater Portland AMJIAC & JIAC CTA Programs
- Implemented Target Industry Growth Strategy for Clark County
- Implemented Foreign Direct Investment Strategy for Clark County within the Greater Portland Region



brent@tipstrategies.com

### Expertise

- Regional and metropolitan economics
- Economic development strategy
- Real estate and property market fundamentals
- Infrastructure analysis
- Capital and financial analysis

### Education

- Master of Science, Community & Regional Planning, University of Texas–Austin.
- Bachelor of Business Administration in Finance, University of Texas–Austin.

### Affiliations

- Member, American Institute of Certified Planners
- Member, American Planning Association
- Past Member, Urban Land Institute.



## Brent McElreath, AICP

Managing Director, Analytics

### Experience

Brent has more than 25 years of experience in comparative urban economic analysis. He has managed research teams in both the public and private sectors and has extensive work experience in real estate and infrastructure markets, with a focus on their cyclical and structural drivers. During his career he has spearheaded innovations in scenario modeling, fiscal impact analysis, and data collection and reporting systems. Brent has authored, co-authored, and edited numerous white papers, articles, and serial reports on global property and infrastructure markets during his career.

As a Vice President at MSCI, Brent designed and implemented performance monitoring systems for metropolitan property markets. He also developed and authored publications explaining differences in investment risks across property types, metropolitan areas, and national markets. His graphical analysis became a fixture of MSCI’s annual property market review presentations in North America, Europe, and the Asia Pacific region.

While at PPR (now CoStar), Brent supervised the publication of 250+ quarterly property market forecasts. He also oversaw the modernization of PPR’s data collection systems and led the firm’s initial groundwork in global risk analysis.

Brent’s career began in economic development in Texas in the 1990s. He brings this background to his current role at TIP, combined with extensive experience in the dynamics of real estate, infrastructure, and capital markets.

Brent is a member of the American Planning Association and an AICP-certified planner.

### Significant Projects

- Strategic planning: Fort Worth, TX (2017); Chester County, PA (2014); Las Vegas, NV (2013); Envision Central Texas (2003).
- Prioritization models: global port investment, for Deutsche Bank (2009); global agricultural markets, for Southern United States Trade Association, (2007); global city office markets, for Mitsui Fudosan (2004).
- Property sector dynamics: European industrial property, for IPD (2013); Asian retail property, for Prudential (2013), US residential property, for State of Michigan Office of Retirement Services (2001).
- Selected publications: *Global Property Performance* (2016); *The Road to a Seamless Global Real Estate Portfolio* (2016); *Sectoral Aspects of Global Infrastructure Investment* (2015); *Global Infrastructure Investment: An Overview of the Institutional Landscape* (2014); “Global Real Estate Risk Index,” *RE/PS* v6, n6 (2002).



karen@tipstrategies.com

### Expertise

- Survey research
- Regional economic analysis
- Economic and fiscal impact analysis
- Workforce and higher education analysis

### Education

- Master of Science, Community & Regional Planning, University of Texas–Austin.
- Bachelor of Arts, Sociology, University of Texas–Austin.

### Affiliations

- Instructor, Texas Basic Economic Development Course

## Karen Beard

### Senior Analyst

#### Experience

Karen Beard has extensive experience as a researcher in both the public and private sector. Since joining TIP in 2000, she has managed consulting engagements for clients across the country. Karen's current area of focus is helping clients understand their workforce. Most recently, she completed a labor market assessment for Clarksville-Montgomery County, Tennessee, which included an update of the Veterans Inventory, a mechanism for assessing post-military plans of Fort Campbell personnel separating from service.

Prior to joining TIP, Karen held the position of senior research analyst at the Texas Department of Economic Development. During her tenure at TDED, she was involved in a number of projects, including the design and maintenance of the agency's "one stop" economic development web sites. In this capacity, she served as the principal developer of the Texas Business & Community Economic Development Clearinghouse, a searchable database of economic development resources.

As a research associate for the State Bar of Texas, Karen analyzed subjects of interest to the legal services industry and participated in dozens of law-related survey research projects, including an extensive annual report on attorney fees and compensation, as well as an award-winning survey on the concerns of minorities in the legal profession. She has also conducted research on the disability community for the Texas Rehabilitation Commission and led a major household travel survey as a research manager for NuStats, an Austin-based transportation research firm. Other topics that she has addressed include the evaluation of manufacturing technology centers and the effect of regulation on the cost of land development.

#### Significant Projects

- Regional economic development planning: Green River Area Development District, KY; WIRED 26-county region, KY/IN; Racine County EDC, WI.
- Defense-dependent communities: Anniston Army Depot, AL; Fort Hood, TX; Fort Campbell, KY.
- Workforce projects: Workforce Solutions of Central Texas; Western Kentucky Workforce Investment Board; Pearland EDC, TX; Workforce Solutions (Lower Rio Grande Valley).





evan@tipstrategies.com

### Expertise

- Regional labor market analysis
- Data manipulation and statistical analysis
- Quantitative and qualitative research

### Education

- Bachelor of Arts, Economics and Psychology, University of Texas at Austin
- Bachelor of Science, Mathematics, University of Texas at Austin

## Evan Johnston

Project Coordinator

### Experience

Evan works as a project coordinator with project managers to collect, organize, and analyze data for clients. He helps the project team to find reputable, reliable data and to manipulate them into meaningful analyses, as well as to research policy and edit reports. He specializes in economic analysis and labor market research. Before joining TIP, Evan worked as a social science research associate at the University of Texas at Austin on research projects examining labor market dynamics and entrepreneurship.

Evan holds a Bachelor of Arts in Economics and Psychology and a Bachelor of Science in Mathematics from the University of Texas at Austin. He also completed certificates in applied statistical modeling, computer science, and business during his undergrad.

### Significant Projects

- Job Polarization in Austin: Co-author of Echeverri-Carroll, Oden, Gibson, & Johnston (2018) "Unintended consequences on gender diversity of high-tech growth and labor market polarization" in *Research Policy*.
- Austin's Entrepreneurial Ecosystem: Contributed to a Kauffman Foundation-funded project to study the emergence of Austin's entrepreneurial ecosystem. Acknowledgement of contributions in Echeverri-Carroll and Feldman (2018) "Chasing entrepreneurial firms" in *Industry and Innovation*.
- Stanford Latino Entrepreneurship Initiative (SLEI): Contributed to a chapter examining minority entrepreneurship and the ethnic enclave hypothesis using data from the SLEI's annual Survey of Latino Business Owners. Acknowledgement of contributions in "Social Network Utilization among Latino-Owned Businesses" (Echeverri-Carroll and Mora, forthcoming).







**Proposal**

for:  
**University City**

**Economic Development Strategy**

May 10, 2019



**The i5 Group**

Urban & Community Planning | Public Affairs | Landscape Architecture

Submitted by:

**The i5Group LLC**  
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In association with:  
**Colliers International**  
 Community and Economic  
 Development Solutions



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May 10, 2019

Libbey Tucker  
Director of Economic Development  
City of University City  
6801 Delmar Blvd.  
University City, MO 63130

**Re: Proposal for the University City Economic Development Strategy Plan**

Dear Ms. Tucker,

The i5Group LLC, in association with **Colliers International and Community and Economic Development Solutions (CED-Solutions)**, are excited to submit our proposal for the University City Economic Development Strategy Plan.

We look forward to working with the City to position University City for continued economic success over the coming decades. While the future can never be completely predicted, communities can better position themselves to manage change and leverage their strengths.

Our team is uniquely suited to assist the City in developing a successful Economic Development Strategy. The following pages describe in more detail our team's strengths. Below are a few highlights:

#### **Realistic Implementation and Placed-Based Approach**

The i5Group, as the prime consultant, has worked with communities across the region in developing realistic long-term solutions. We understand that communities need more than recommendations, they need implementation strategies that are actionable and match the capacity of City staff and leaders. We also bring a placed-based approach to economic development. This is especially important for the next generation of retail as consumers demand more of a place-based and experiential shopping experience.

#### **Robust Economic and Market Analysis**

Colliers International will take the lead in analyzing existing conditions including the assessment of economic conditions and the market analysis. Colliers International is an industry leading global real estate company that operates in 68 countries with over 15,000 skilled professionals. The mission of Colliers is to be a leader in global real estate services through a culture of service excellence, expertise, and community. Their research is rooted in their experience in global real estate.

#### **Leveraging University City's Assets for 21st Century Growth**

Jacqueline Davis-Wellington, Managing Partner of CED-Solutions, previously served as Executive Vice President and Chief Operating Officer for the St. Louis Economic Development Partnership. With CED-Solutions partner Elizabeth Noonan, Jacqueline brings regional knowledge and expertise of economic development trends. CED-Solutions bring unmatched experience to best leverage University City's assets for 21st Century Growth.

We look forward to working with the City on this exciting plan to develop an Economic Development Strategy for University City.

Sincerely,

Stephen Ibendahl, ASLA, AICP  
Principal, The i5Group LLC  
314-265-3178 / stephen.ibendahl@thei5group.com

The i5Group working with community stakeholders on a recent project





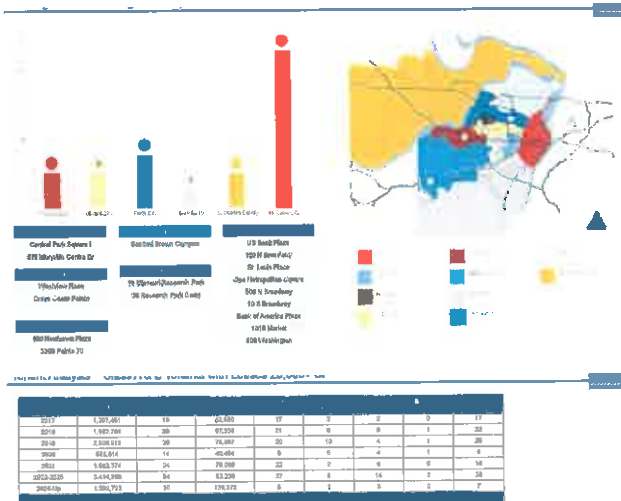
# Our Team: Robust Economic Assessment and Market Analysis

Colliers International is an industry leading global real estate company that operates in 68 countries with over 15,000 skilled professionals. The mission of Colliers is to be a leader in global real estate services through a culture of service excellence, expertise, and community. Colliers International believes that market insight is the essential ingredient in all the services we offer. Our goal is to use our market expertise and knowledge to accelerate the success of our clients and partners. Through our Research Department, we track trends, absorption, vacancy and demographics data, and make projections to help you make critical decisions.

Collier's St. Louis Market Research team continuously source and analyze industrial and office data throughout the St. Louis region. Allison Gray is Collier's Director of Research and has been in the industry since 2010. Allison performs economic and statistical analysis to develop accurate and timely

"Colliers International will use workforce data, demographics, regional asset maps, business climate information, commercial real estate market data and historic transaction databases to determine the current market conditions of Fairview Heights and will focus on how it can be strategically positioned to promote economic development and sustainability."

market data. Allison will implement a research and analysis strategy to evaluate the current economic conditions of University City. Examining the factors that dictate market demand, we will focus on the ability of University City. to maintain a robust employment base and to attract companies & top talent to the region. Colliers International will use workforce data, demographics, regional asset maps,



Examples of past analysis by Colliers International.

business climate information, commercial real estate market data and historic transaction databases to determine the current market conditions of University City and will focus on how it can be strategically positioned to promote economic development and sustainability. Demographic, housing, and economic (e.g., labor force and business growth) data will be evaluated using the latest available information from a wide range of public and private sources, including the U.S. Departments of Commerce and Labor, Esri Business Analyst Online, and others. An inventory will be created based on current building stock, occupier data and business type. We will examine how land is currently being used and if any areas are underutilized. Existing land use will be compared to market projections for population, housing and economic development to determine if land is being used effectively to meet market demand and future needs for various real estate products.

# Our Team: Leveraging University City's Assets for 21st Century Growth



Community and Economic Development (CED-Solutions) is an economic and community development consulting firm that helps communities understand their markets and develop strategies around real estate development and redevelopment, job creation, enhancing innovation and attracting and retaining business. Founded by the former executive leadership team of the St. Louis Economic Development Partnership, we have successfully delivered economic strategies and programs for distressed real estate, economic diversification, regional entrepreneurship, international trade development and defense adjustment, among others. Our team also understands successful implementation because we've done it. To be successful, an economic development strategy must produce measurable economic investment and growth, employment opportunities and physical and social community assets.

CED-Solutions will help provide analysis and recommendations for University City's economic development strategy based on the findings of our team's economic assessment, demographic research and market analysis as well as research into the City's current economic conditions and infrastructure (major employers, start-up activities, local economic development partners, current initiatives etc.). The CED-Solutions University City team will include Jacqueline Davis-Wellington and Elizabeth Noonan. Jackie serves as Managing Partner of CED-Solutions, responsible for overall coordination of all projects and staff. She brings extensive experience in all aspects of major strategic planning activities along with real estate development/construction and project management. Beth brings over seventeen



years of experience in economic and community development with significant focus on real estate and community redevelopment and innovation and entrepreneurship initiatives.

Grounded in a thorough understanding of local conditions, we will apply our experience and research into national and regional trends to identify growth opportunities for University City in light of its strengths and challenges. The ultimate intent of this SWOT analysis is to develop a strategy that aligns local strengths with broader regional geographic opportunities and is supported by national trends and demands. Key aspects of the analysis will include recommendations for growing and retaining existing businesses; opportunities for attracting new businesses that complement the City's strengths; supporting innovation, entrepreneurship and small business development; enhancing the local talent pool; and developing or strengthening local and regional partnerships that will advance the local economy, all in a manner that maximizes equitable growth and opportunity. We will also provide strategic input into the development of the place-based growth strategy applying best practices for real estate and economic development. Additionally, based on our review of the City's existing economic development infrastructure (staffing, incentives and development tools etc.), we will assess the City's current capacity to oversee strategy implementation and make recommendations for augmenting that capacity, if needed.

"Our team understands successful implementation because we've done it."

# Our Team: Place-Based Approach and Realistic Implementation



The i5Group, as the prime consultant, has worked with communities across the region in developing realistic long-term solutions. We understand that communities need more than recommendations, they need implementation strategies that are actionable and match the capacity of City staff and leaders. Part of realistic implementation is understanding other local and regional economic development strategies.

We will bring a place-based approach to economic development. This is especially important for the next generation of retail as consumers demand more of a place-based and experiential shopping experience. An example of our place-based approach is our recent comprehensive plan for the City of Lake Saint Louis. The i5Group recommended a mixed-use focus for the struggling Meadows shopping center. Working with residents to determine the community's vision for what "mixed-use" actually meant and what was feasible from a market perspective, the final plan recommended office and high density residential within a walkable environment. Within six months of the plan's adoption, a 220-unit apartment complex was proposed for the Meadows site. The plan also

recommended strategies and created a vision for redevelopment of the Uptown district of the City.

University City already has a strong place-based approach to development. The Loop and the numerous neighborhood business cluster have a wonderful sense of scale and place. We will examine ways to further place-based approaches in other areas of the City. Node identification and place-based strategies will allow the City to better focus resources for specific economic development opportunities.

Below: The i5Group used a place-based approach to the land use and economic development recommendations for the City of Lake Saint Louis Comprehensive Plan. The plan recommended a mixed-use focus for the struggling Meadows shopping center. Within six months of the plan's adoption, a 220-unit apartment complex was proposed for the Meadows site.



# Scope of Work



## Task I. Assessment, Benchmarking & Evaluation

The i5Group Team will conduct an economic analysis of the City of University City and its economic relationship to the surrounding Metropolitan Statistical Area (MSA). The purpose of this analysis will be to help the City of University City to better understand its economy in the context of the larger metro area in order to identify unique opportunities for economic development, to recommend how to best position municipal resources for the future, and to suggest potential regional synergies for economic growth and diversification.

The i5Group Team will review relevant previous economic studies (e.g., the Comprehensive Economic Development Strategy developed by the Southwestern Illinois Metropolitan & Regional Planning Commission), reports and other related information provided by the City of University City to ensure that the Economic Development Strategy builds upon and coordinates with other economic development research. To the degree possible, City staff will make available local data requested by the i5Group Team. The City will also provide information regarding its current economic development programs, staffing and budget, as well as provide relevant information about its local economic development partners. Historical parcel data (from the City or St. Louis County) with appraised values will be particularly

useful to identify economic nodes in the City. The assessment, benchmarking and evaluation portion will include:

### Demographic Analysis

A detailed demographic profile of the City considering such factors as population, household income, wealth and credit levels, impacts of poverty, education levels, property values and trends in property ownership, skills gaps, joblessness, underemployment, and race for up to the past ten years.

### Local (City) Economic Assessment

A detailed analysis of the City of University City's economic base, including:

- **Large Tier:** Overview of the City's economy and the drivers responsible for the majority of the economic activity in the City including, at minimum: the private employers with the largest number of employees in the City; largest government employers in the City; industries that are employing the most people within the City; employers that employ the most City residents, to the extent made available to the City or the i5Group Team; businesses that produce the most sales tax revenue for the City; businesses that produce the most earnings tax revenue for the City; and identifying sectors of the economy that produce the most employment and generate the most tax revenues to the City.



The i5Group facilitating a stakeholder / focus group meeting.

- **Small Tier: Overview of the micro-enterprise, small business and innovation economy components of economic activity within the City.**
- **Analysis of economic trends to determine their impact on University City's future economic advantages and challenges.**
- **Identification of University City's position within the greater MSA and region, how the shared economies interact, and how each business sector contributes to the local economy.**
- **Strength/Weakness/Opportunity/Threat (SWOT) analysis to identify major strengths, weaknesses, opportunities and threats in the market, particularly as they compare to similar, competitive (or emerging competitive) markets, and identification/evaluation of exposure to systemic risks.**



Our assessment will include identifying the various states of commercial development within the City.

### **Economic Development Ecosystem**

Evaluation of relevant existing reports, initiatives and resources to ensure that the economic development strategy's recommendations are properly informed, including:

- Existing reports and relevant recommendations (e.g., Comprehensive Plan)
- Proposed developments in University City and adjoining communities
- Current Community Development initiatives (e.g., opportunities to leverage Opportunity Zones and the Promise Zone etc.)
- Existing data and data infrastructure (i.e., universities, Regional Data Alliance)
- Existing resources to be leveraged (i.e., state, federal, philanthropic)

### **Internal Assessment - Review of City The**

The i5Group Team will review internal operations as they pertain to economic development activities and goals, including:

- Programs
- Policies, practices, procedures
- Staffing

### **Task 1 Deliverables:**

- *Assessment, Benchmarking, and Evaluation to be part of deliverable under Task 2.*

## Task 2. Market & Industry Cluster Analysis

The Industry Cluster Analysis portion of the Economic Development Strategy will identify economic sectors in which University City currently is or is capable of becoming competitive at the regional level, as follows.

### Industry Segment Analysis

The i5Group Team will identify industries three-digit NAICS in the City that are:

- Dominant and expected to grow
- Dominant but waning due to industry/economic/technological or other trends or lack of infrastructure
- Emerging and a good match; expected to grow
- Currently non-existent but for which a good match exists.

### Market Assessment

The i5Group Team will conduct a market assessment that will:

- Analyze global trends, drivers and risks affecting existing industry clusters.
- Identify key occupations where University City has a competitive advantage against other parts of the region and show how the City can leverage these strengths to grow current industry sub-clusters and/or create

new ones.

- Secure feedback from key industry leaders and entrepreneurs on challenges and opportunities in the City
- Identify risks to maintaining the occupational advantages of University City vis a vis evolving technologies, employer requirements, and educational/certification standards.
- Benchmark the top industry sub-clusters with opportunity for growth
- Identify up to five priority investment opportunities.

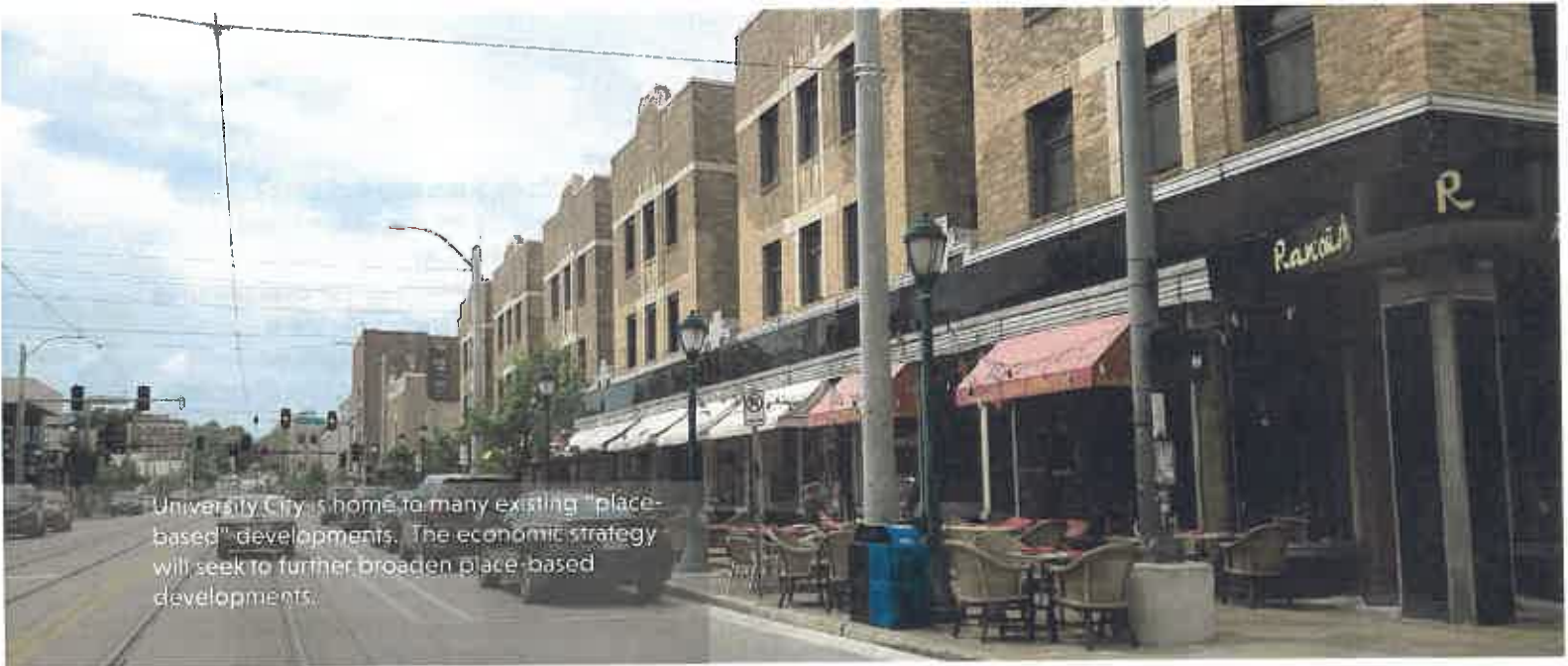
As part of Task 6 - Community Engagement, the i5Group Team will interview key industry corporate executives, entrepreneurs and others to gain insight into challenges and opportunities for the City

### Task 2 Deliverables:

- *Assessment and Market Analysis Report*

University City has numerous neighborhood business clusters such as this location at the intersection of Delmar and North and South Road.





University City is home to many existing "place-based" developments. The economic strategy will seek to further broaden place-based developments.

### **Task 3. Neighborhood Economic Nodes (Place-Based Growth Strategy)**

There has been successful growth and revitalization of St. Clair Square, other regional shopping centers and the Lincoln Trail District. There is an opportunity to lay the groundwork for the revitalization of neighborhoods which have not yet shared in this growth.

One of the keys to successful neighborhoods in other cities in the region has been growth around main corridors, parks, and transit hubs. The i5Group Team will identify prospects throughout the City for building further economic nodes that can serve as the economic engines for their surrounding neighborhoods.

#### **Node Identification**

The i5Group Team will use data & windshield surveys to identify the existing and potential nodes throughout the city which can serve as the economic engines within specific neighborhoods;

The i5Group Team will identify the physical locations within the City where industry cluster targets are growing, and tie the cluster strategy to the neighborhood growth strategy.

#### **Place-Based Growth Strategies**

A set of policies, strategies and tactics will be developed that the city should pursue for developing each of the neighborhood profile types;

Top prospects will be identified and rated for small to mid-size land assembly sites for quick (within 5 years) redevelopment to aid in the revitalization of distressed neighborhoods. It is assumed parcel data will be made available to the consultant.

#### **Task 3 Deliverables:**

- *Neighborhood Economic Nodes to be part of deliverables under Task 5.*



## **Task 4. Recommendations & Best Practices**

A strong and resilient local economy requires myriad elements, ranging from a vibrant entrepreneurial culture to dynamic small business growth to ongoing, targeted business recruitment.

In this section of the Economic Development Strategy, the i5Group Team will identify best practices in these and many other areas that are critical to the City's continued economic success. The i5Group Team will provide recommendations based on best practices appropriate to University City's demographic profile, market and cluster analysis, and opportunities for place-based economic growth.

### **Cluster Industries**

The i5Group Team will provide recommendations or framework for a 5-year industry sub-cluster growth strategy and implementation program including opportunities for multiplying those industries with the greatest growth potential, as well as ideas for either sustaining (or making the city more resilient to) foundational industries that are threatened or at great risk of downsizing

### **Small Business and Entrepreneurialism**

The i5Group Team will provide recommendations for maximizing the City's entrepreneurial & small business ecosystem, including strategies for recruiting early stage companies and entrepreneurs. The potential for creating an incubator or co-working space will also be considered along with recommend strategies for leveraging creation of a small business incubator, if appropriate.

### **Business and Talent Retention and Expansion**

The i5Group Team will identify best practices, such as business retention and expansion strategies and how University City and its partners could pursue these practices in the most efficient manner. Key resident/talent attraction strategies for growing the city's population will be identified.

### **Incentive Programs**

Incentive programs that will help attract new job growth and/or retain existing job growth in targeted industries will be identified.

### **Equitable Growth**

The i5Group Team will recommend best practices for ensuring that growth and development is equitable and inclusive of groups who historically have had limited access to economic opportunity. The goal is to provide direction for attaining the maximum reach of the economic benefits that are expected as a result of the successful execution of this plan.

### **Financial Resiliency**

The i5Group Team will identify opportunities that University City can pursue to grow its tax base as efficiently as possible to reach financial sustainability.

### **Marketing and Messaging**

The i5Group Team will assist the City in developing likely messages/campaigns that inform and influence site selection decision makers and consultants to attract targeted industries along with website content that would be helpful for site selection.

### **Task 4 Deliverables:**

- *Recommendations and Best Practices to be part of deliverables under Task 5.*

## Task 5. Implementation

This segment of the Economic Development Strategy will tie together all of the previous elements into a clear set of strategic actions and tasks that the City in collaboration with its partners (including businesses, CDCs, the Economic Development Partnership, the Regional Chamber and others) can implement in order to reach defined goals supporting a resilient and equitable economy in University City.

This strategy will become a “tool kit” adopted by the City as a living/breathing “manifesto” that can be implemented in real time to achieve real, long-term population, business and tax base growth and stability for University City. The implementation section is expected to include:

### Policy Changes

The i5Group Team will identify policy or procedural change recommendations, as needed, for the City to achieve the economic growth and resilience strategy’s goals. As relevant, local policy recommendations will be suggested that support the implementation of the plan.

### Economic Development Toolbox

The i5Group Team will recommend needed changes, if any, to the City’s economic development toolbox, including changes to incentive programs (including new incentive or financing tools), or the addition of programs or services to better promote business development.

### Economic Development Department

Current Economic Development Department operational capacity, programs and services at University City will be analyzed and recommendations for any structural changes needed within the City’s Economic Development Department to make it more effective in accomplishing the goals within the strategic plan will be provided.

### Collaboration

The i5Group Team will identify areas in which increased collaboration between the City’s Economic Development Department and other economic development network partners could bring greater economies of scale and help achieve

strategic objectives.

Ways that the City and its partners can work together to be more agile in implementation of the Economic Development Strategy will be recommended so that the City can be flexible and adaptable in its implementation.

### Metrics

The i5Group Team will create an implementation matrix that includes recommendations as to leaders, partners, and likely timeline and resources (both current and potential funding sources). It is important to note that partners may be identified that were not part of this planning process. As part of the City’s on-going implementation and outreach, the City will need to continue to outreach to partners.

The i5Group Team will assist the City in identifying metrics for the City to track progress and success of the plan. The City could publicize the metrics and progress on the City’s website and other communication tools.

### Reasonable Schedule

A timeline for topline tax revenue growth will be provided that could be expected following successful implementation of the economic strategy with commentary about long-term implications.

### Task 5 Deliverables:

- *Draft Economic Development Strategy Plan*
- *Final Economic Development Strategy Plan*



## **Task 6. Community Engagement**

### **Stakeholder Meetings**

Individual stakeholder meetings are a great early step in the economic development strategy. Stakeholder meetings have multiple benefits. One, the meetings identify early in the process key issues and priorities. The meetings also allow for a more robust and honest dialogue than is often possible in a larger public meeting setting. Second, the meetings also begin to identify “project champions” that can assist in promoting the planning process and the plan itself.

We foresee two series of stakeholder meetings – internal and external meetings. Internal meetings are stakeholders within the City such as major businesses, property owners, developers. External stakeholders will include regional economic stakeholders that will help in understanding the regional context of University City in the St. Louis market.

Total individual stakeholder meetings will be 15-20 meetings (internal and external stakeholders). Meetings will be typically 40-45 minutes in length. The i5Group will schedule meetings, in coordination with City staff, with an introductory letter, if needed. Individual notes shall be taken by the i5Group for each meeting, but individual meeting notes will not be part of the deliverable. A summary of stakeholder and focus group meetings will be part of the deliverable.

We expect 3-5 follow-up meetings with stakeholders to discuss the draft economic development strategy.

### **Advisory Committee**

The i5Group will work with the City to develop a 12-15 person advisory committee. The City shall invite members to participate. The advisory committee should include representatives from city staff, city council, planning commission, and other stakeholders from the City. The City’s Economic Development Commission could be the foundation for the committee, with additional members for this special planning process. A 12-15 person advisory committee provides a broad cross section of the community while being manageable in terms of meeting facilitation. The

advisory committee is expected to meet every two months. The i5Group will prepare an agenda for each steering committee meeting.

### **Community Meetings**

We are proposing on open house during the planning process. Open houses are a great way to allow residents a chance to come together in a community forum and learn more about the economic development strategy. It is important to allow residents to learn in-depth about the economic development strategy early in the process. Marketing the open houses will be the responsibility of the City. Marketing through existing City communications is expected to include the City’s newsletter, social media, and website.

The open house will present the draft economic development strategy plan. Both community meetings will be an open house format, with no formal presentation. As an additional service, we recommend another open house early in the process to present the results of the Assessment and Market Analysis

### **Adoption of the Plan**

We will coordinate with City staff to present the recommendations of the economic development strategy to the Economic Development Commission and the City Council for review and adoption.

### **Summary Brochure / “Press Kit”**

Since economic development strategy plans are rarely done, the process and benefits of the plan are sometimes not easily understood by residents. At the beginning of the study, we will develop a 2-4 page press kit/summary brochure that will outline the planning process, reasons for doing the plan, and a Q&A section with typical questions and answers about the plan. We have found that by addressing common questions early in the planning process, it helps to alleviate concerns further in the plan.

### **Task 6 Deliverables:**

- *Summary of Open Houses and Stakeholder Meetings*
- *Brochure / “Press Kit”*
- *Advisory Committee Agendas and Presentations*

# Schedule

	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr
Steering Committee Meeting		■		■		■		■	■	
Project Kickoff	■									
Stakeholder Meetings		■	■	■						
Assessment, Benchmarking & Evaluation	■	■	■	■						
Market & Industry Cluster Analysis	■	■	■	■						
<i>Deliverable - Assessment and Market Analysis Report</i>				●						
Neighborhood Economic Nodes (Place-Based Growth Strategy)				■	■	■	■			
Recommendations & Best Practices				■	■	■	■			
Community-wide Informational Meeting							●			
Implementation Strategies							■	■		
<i>Deliverable - Draft Plan</i>								●		
Draft Plan (Review by Staff/Advisory Committee)							■	■	■	
Adoption Process									■	■

The Economic Development Strategy schedule is based on a 9-month process. This schedule can be adjusted based on conversations with the City. The plan assumes a July start date, which can be adjusted as needed. We recommend not to rush the final adoption process. Often City staff can “test drive” the draft plan during the final review process to ensure that the plan will be applicable on a daily basis.



# Fee Structure

## Fee Structure

The i5Group's fee structure for planning and community engagement work is typically a max, not-to-exceed amount with monthly billing on a percent complete, hours billed, or per task/milestone basis. Contract amount is determined by a mutually agreed scope of work.

Below is our anticipated fee based on the scope of work as outlined in this proposal. A detailed breakdown of hours will be part of the final project contract.

**Task 1: \$17,900**  
**Assessment, Benchmarking & Evaluation**

**Task 2: \$21,920**  
**Market & Industry Cluster Analysis**

**Task 3: \$14,760**  
**Neighborhood Economic Nodes**  
**(Place-Based Growth Strategy)**

**Task 4: \$13,290**  
**Recommendations & Best Practices**

**Task 5: \$13,290**  
**Implementation**

**Task 6: \$17,750**  
**Community Engagement**

**Proposed Fee: \$98,910**  
**(In addition to reimbursable expenses)**

In addition to the base scope of work as outline in this proposal, we recommend the following as additional scope items: 1) An additional community-wide informational meeting early in the process to present the Assessment and Market Analysis; 2) Additional renderings as part of the place-based recommendations; 3) tourism strategies; and 4) state policy recommendations. These items can be discussed in more detail during final contract negotiations.

## Hourly Rates

### Hourly Rates

Stephen Ibendahl, ASLA, AICP	\$120/hr
Sean Thomas	\$100/hr
Laura Linn	\$75/hr
Jacqueline Davis-Wellington	\$150/hr
Beth Noonan	\$150/hr
Allison Gray	\$250/hr
Planner I	\$70/hr
Technician/Admin	\$60/hr

### Reimbursable Expenses Include:

- Mileage (2018 IRS Rate - \$0.545/mile)
- Reproduction Cost
- Postage Cost
- Overnight Delivery Cost
- Printing Cost
- Meeting Materials including Food/Drink

The above are reimbursable at the Team's direct cost. We do not mark-up any expenses. We strive to work with local or neighborhood printers and other service providers when feasible and practical.

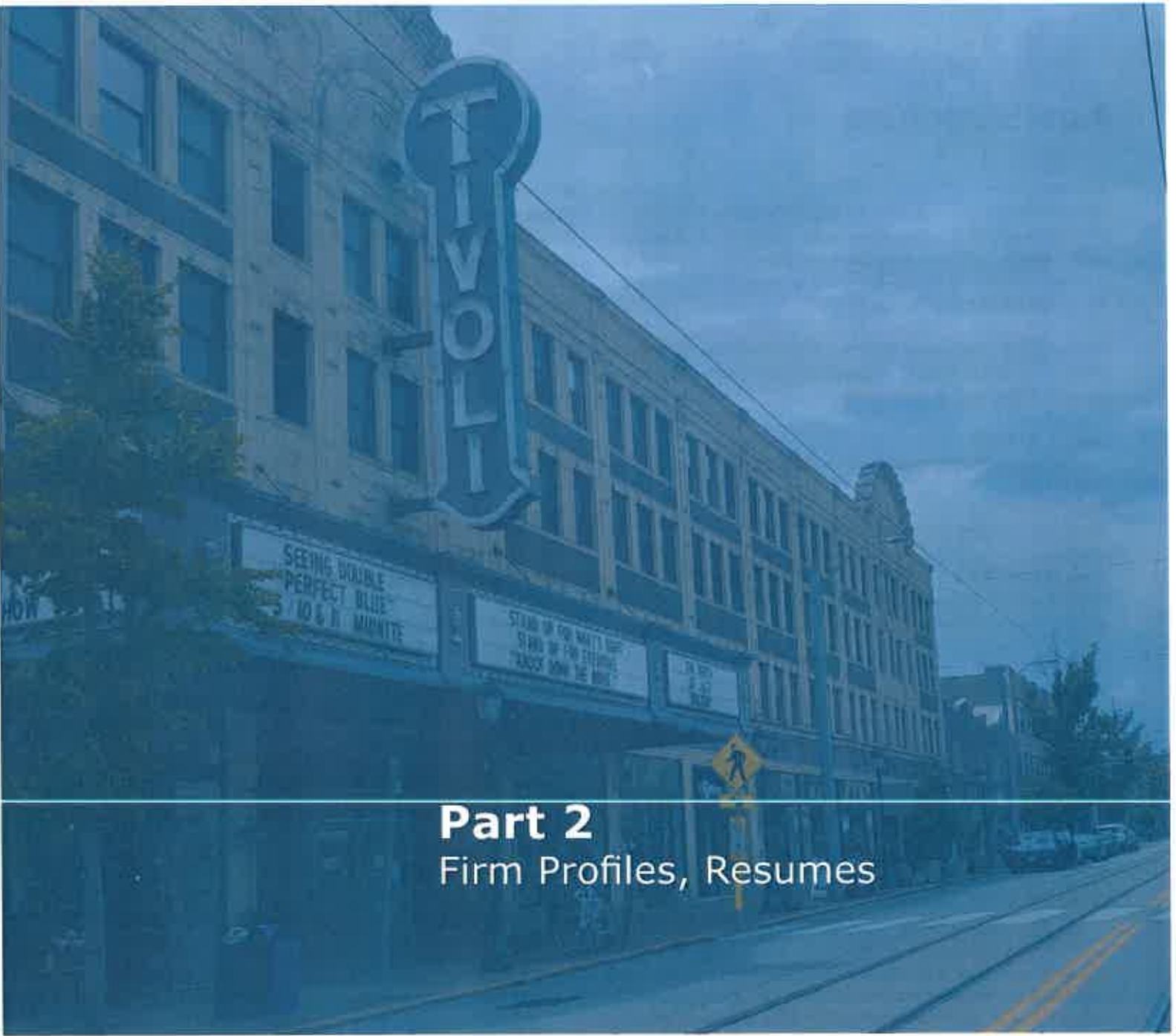
### Anticipated Reimbursables

Mileage	\$600
Assessment Report (25 Copies)	\$700
Draft Plan (25 Copies)	\$950
Final Plan (25 Copies)	\$950
Open House #1 Boards	\$500
Open House Supplies	\$200
Brochures	\$500
Misc Printing	\$300
Postage	\$150
Misc	\$200

**Total Anticipated Reimbursables \$5,050**

## Insurance Requirements

The i5Group contracts with various public sector clients. We have appropriate insurance to meet all levels of insurance requirements.



**Part 2**  
Firm Profiles, Resumes

**Part 2**  
Firm Profiles, Resumes

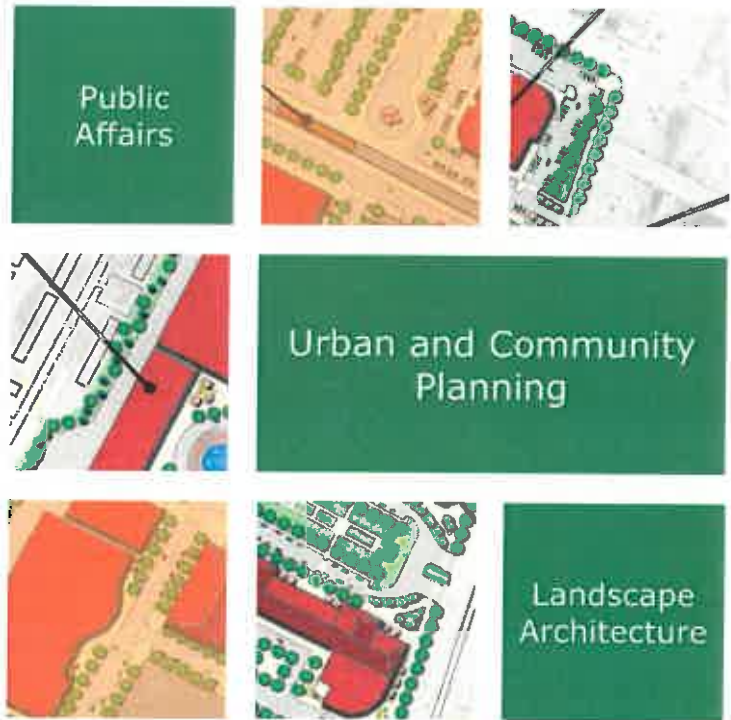
# Qualifications - Firm Profile

The i5Group unabashedly believes that our region is one of the great places in the country to live and raise a family. Whether it's the historical urban parks of the City of St. Louis, the wheat fields of Washington County, the greenways and trails that crisscross our region, the numerous walkable downtowns of our communities, or the strong corporate and entrepreneur small businesses that take advantage of our multimodal strengths, we live in a great region with many strengths and opportunities.

The i5Group provides expertise in urban and community planning, public affairs, and landscape architecture. We strive to provide innovative solutions to our community, business, agency, and organizational clients that create value both for them and our region.

The i5Group provides the following services:

- Urban and Community Planning
- Public Affairs
- Landscape Architecture



The staff of The i5Group brings a tremendous amount of experience working with communities, agencies, organizations, and business clients.

Past experience has included:

Agencies

Great Rivers Greenway District  
 EW Gateway Council of Governments  
 Illinois Department of Natural Resources  
 Illinois Department of Transportation  
 Kaskaskia Regional Port District  
 Metro  
 Metropolitan St. Louis Sewer District  
 Missouri Department of Transportation  
 Southern Illinois Metropolitan Planning Organization (SIMPO)

Communities

City of Alton  
 City of Belleville  
 City of Carbondale  
 City of Chesterfield  
 City of Columbia, IL  
 City of Columbia, MO  
 City of Fairview Heights  
 City of Maryland Heights  
 City of St. Louis  
 City of St. Robert  
 City of Waterloo  
 City of Wildwood  
 Village of Smithton

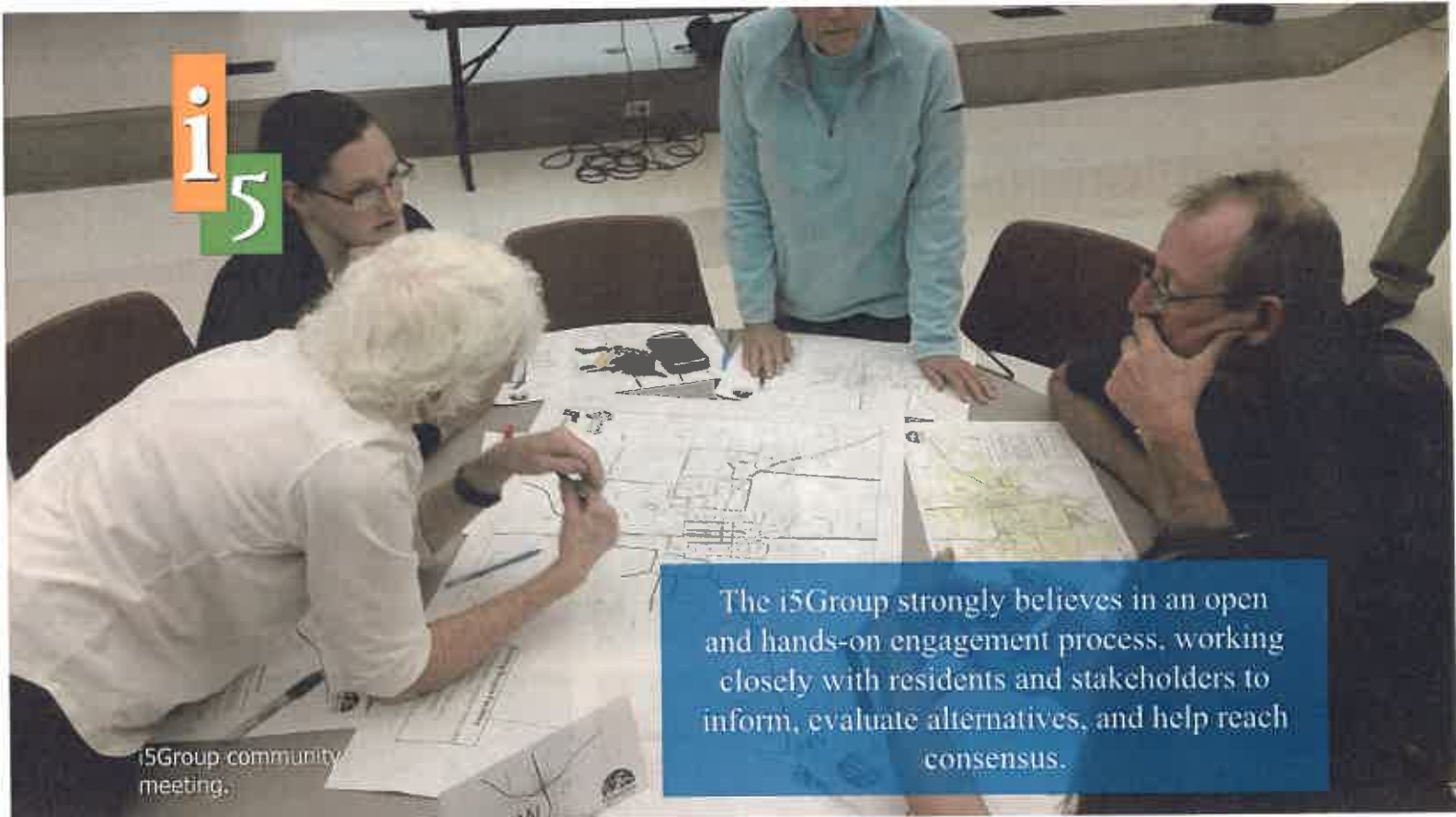
Counties

Madison County  
 Randolph County  
 St. Charles County  
 St. Clair County  
 St. Louis County

Organizations and Businesses

AIA Sustainable Design Assessment Team  
 Avery School  
 The Desco Group  
 Duke Realty  
 Get-Up and Go  
 Public School Retirement System  
 South Grand Business Association  
 St. Louis Science Center  
 St. Margaret of Scotland

The i5Group LLC | 4818 Washington Blvd, Suite 203 | St. Louis, MO 63108 | 314-265-3178  
[www.thei5group.com](http://www.thei5group.com) | [info@thei5group.com](mailto:info@thei5group.com)



The i5Group strongly believes in an open and hands-on engagement process, working closely with residents and stakeholders to inform, evaluate alternatives, and help reach consensus.

i5Group community meeting.

## Urban and Community Planning

Urban and community planning provides the vision and framework for communities to grow and prosper. The i5Group works with community officials and staff, business leaders, and neighborhood groups to create a shared community vision and tangible products that will ensure that a community's vision is fulfilled.

We believe any good planning process begins with listening to stakeholders to fully understand the issues and context, thorough analysis, and recommendations that are fully vetted and communicated throughout the process.

Services include:

- Comprehensive Planning
- Community and Neighborhood Plans
- Land Use Planning
- Policy and Ordinance Review and Development
- Zoning Districts

## Landscape Architecture

Landscape Architecture is both an art and a science. It combines aspects of design, planning, and stewardship for our natural and man-made environments.

The i5Group provides expertise in landscape architectural solutions that are context based and contribute to the vibrancy of our communities and natural environments. We believe that sustainability is multi-faceted and that sustainable solutions create economic, social, and environmental benefits.

Services include:

- Parks and Open Space Design and Planning
- Trail and Greenway Planning and Design
- Complete Streets and Pedestrian Planning
- Green Infrastructure Strategies and Solutions
- Streetscape Design
- Transportation Enhancements
- Context Sensitive Design
- Site Planning
- Watershed Planning

## Public Affairs

The i5Group strongly believes that a well-executed public affairs strategy should be an integral part of planning and design. Public affairs begins with identifying the goals of the effort and then identifying a strategy, schedule, and actions to achieve those goals.

The i5Group understands that time spent listening to a wide spectrum of stakeholders early in the process to identify key concerns, issues, and opportunities pays huge dividends later. We engage the public, stakeholders, and elected officials in a wide variety of methods including one-on-one meetings, small group discussions, surveys, open houses, work groups, committees, social media, and printed materials to effectively listen and communicate throughout the process.

We work with communities, agencies, businesses, organizations, and neighborhood groups to develop an effective and engaging public affairs strategy.





# CED-SOLUTIONS

community and economic development

## Firm Profile

Community and Economic Development Solutions (CED-Solutions) is a national economic development consulting firm that serves communities, businesses and not-for-profits. Founded in 2016 by the former executive leadership team of the St. Louis Economic Development Partnership, CED-Solutions helps clients develop and implement community and economic development projects that advance their strategic priorities and produce concrete, measurable results. Our vision is to leverage our collective experience in economic development to assist a wide variety of clients develop, fund and deliver projects to build better communities.

CED-Solutions helps communities and organizations develop strategies that work by utilizing an inclusive process, creating measurable objectives, identifying opportunities for funding and developing a timeline for success. We have successfully delivered economic strategies and programs for distressed real estate, economic diversification, regional entrepreneurship, international trade development and defense adjustment, among others.

A great strategy is only the beginning. Our team understands successful implementation that produces measurable economic investment and growth, employment opportunities and physical and social community assets because we've done it. We have successfully delivered hundreds of complex projects on time, within budget, and managed more than \$250M in state and federal grants.

The CED-Solutions team's experience includes the following—

- redevelopment of a contaminated former industrial site into a \$450M casino and entertainment complex;
- master plan development and implementation for a 550-acre business park, resulting in \$556M in investment and the creation of more than 12,000 jobs;
- funding, construction and management of one of the nation's largest systems of small business incubators;
- creation and management of a \$100M New Market Tax Credit program; and
- predevelopment, funding, design and construction of community and aquatic centers, job training centers, industrial parks, developmental childcare centers, streetscape and façade improvement projects, and many others.

Community and Economic Development Solutions  
6320 Washington Avenue  
St. Louis, Missouri 63130

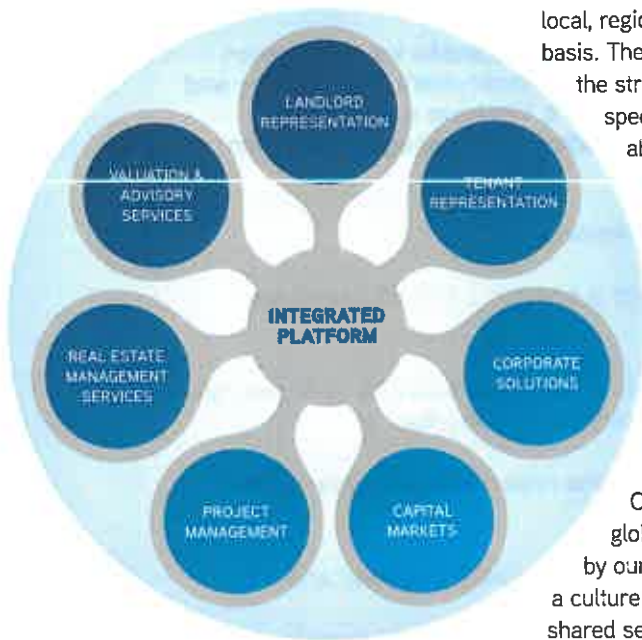
314-960-4921  
[www.CED-Solutions.com](http://www.CED-Solutions.com)

## Firm Profile

AT A GLANCE

# Colliers International

### COLLIERS SERVICE LINES



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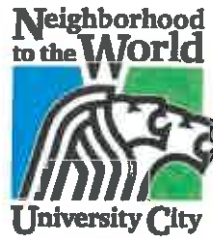


Recognized and ranked 12 consecutive years, more than any other real estate services firm.



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# Organizational Chart



**Advisory Committee**

**Project Manager**

 **Stephen Ibendahl, ASLA, AICP**  
The i5Group  
*Project Manager*

The i5Group Team consists of a talented group of community planning professionals.

Stephen Ibendahl will be the project manager. He brings over 20 years experience as a community planner. He will coordinate communication between the City and the project team and be responsible for all aspects of management of the project team. Most importantly, it will be a seamless team.

Resumes of key team members follow.

 **Sean Thomas**  
The i5Group  
*Community Engagement, Plan Support*

 **Laura Linn**  
The i5Group  
*Renderings of Placel Based Growth*

 **Allison Gray**  
Colliers International  
*Market and Demographic Analysis*

 **Jacqueline Davis-Wellington**  
Community and Economic Development Solutions  
*Economic Development Strategy*

 **Elizabeth A. Noonan**  
Community and Economic Development Solutions  
*Economic Development Strategy*

The project team has the capability to perform the work as outlined per the schedule. The project team has a strong history of performing excellent work, on time, and on budget. As our past clients can certainly attest, we understand the importance of staying on schedule and controlling costs.

## Resume:

**Stephen Ibendahl, ASLA, AICP**  
Principal, The i5Group



## Background

Stephen Ibendahl, Principal of The i5Group, brings over 20 years of experience in community and urban planning, public affairs, landscape architecture, and project management. His management and project experience includes a wide range of projects including: comprehensive planning, land-use planning, urban design, greenways and trails, parks and open space, freight, strategic planning, site development, zoning, transit, public engagement, fundraising, advocacy, and policy.

He brings a context sensitive approach to problem solving by engaging a wide range of stakeholders. Past clients include communities, state and federal agencies, neighborhood organizations, and businesses. Stephen brings trusted public engagement and facilitation experience in working with community groups, whether it is a committee of 10 or a standing room only crowd of over 100.

Stephen has helped developed innovative funding programs for clients and organizations including sponsorship programs, fundraising strategies, and public/private partnerships. He is an advocate for walkable communities, sustainable design, and green infrastructure. He has served on the OneSTL Steering Committee, the Forest Park Advisory Committee, the Lafayette Park Advisory Board, FOCUS St. Louis Sustainability Roadmap Task Force, MSD's Stormwater BMP Work Group, and AIA's Sustainable Design Team.

Stephen is a member of the American Planning Association (APA) and served as the St. Louis Trustee on the national board of the American Society of Landscape Architects (ASLA) which provides strategic direction, appoints executive committee members, and provides fiduciary oversight for the 15,000 member, \$7 million budget organization.

## Lectures and Presentations

'Digital Community Engagement Strategies - How to Avoid Trolls'  
Missouri Conference of the American Planning Association, 2017

'Green Infrastructure - Investing for Community Quality of Life and Economic Growth'  
Missouri Conference of the American Planning Association, 2014

'Alton Multimodal Station – Public Engagement and Zoning Development'  
Illinois Department of Transportation State Planning Conference, 2013

'Marketing the Profession' Panelist, LandUp Chicago, 2013

'Regional Plan for Sustainable Development, a Perspective from Southwestern Illinois'  
St. Louis Regional Chamber and Growth Association, 2012

'Which Sustainable Rating System is Best for You?'  
Missouri Conference of the American Planning Association, 2011

'I64 Sponsor Program'  
St. Louis Regional Chamber and Growth Association, 2010

'Site Design for Water Quality', Panelist, Earth Day Symposium, 2008

'Analyze This! Analyze That! When Done Well, How Site Analysis Can Lead to Innovative and Sustainable Approaches to Development.'  
St. Louis Metro Section of APA Annual Planning Workshop, 2006

## Education

Bachelor of Landscape Architecture  
University of Illinois  
Urbana-Champaign, 1997

Advanced Certificate of Non-Profit  
Management  
Washington University, St. Louis, 2003

## Certifications

American Institute of Certified Planners (AICP)  
Registered Landscape Architect  
Missouri, 2001028932  
Illinois, 157.001555

## Professional Affiliations

American Planning Association  
Member: 2008-Present

American Society of  
Landscape Architects (ASLA)  
National Trustee, 2012 to 2015

## Boards and Committees

Forest Park Advisory Board  
St. Louis Missouri, 2015 to Present

OneSTL Regional Sustainability Plan  
Steering Committee Member  
2011-2013

MSD's Stormwater BMP Work Group  
ASLA Representative, 2010

FOCUS St. Louis  
Regional Sustainability Roadmap  
Task Force Member, 2009

AIA Sustainable Design Team  
Project Planning Team  
Pittsfield, Massachusetts, 2005

Lafayette Park Advisory Board  
St. Louis Missouri, 2004 to Present

## Experience: Planning and Economic Development

### **Mixed-Use Zoning District Development, Alton, IL**

Stephen was the project manager for development of a new mixed-use zoning district for the City of Alton. Zoning district included standards that promoted walkable, complete streets by requiring limited building setbacks and parking in rear of buildings. To meet sustainability goals, the district strengthened stormwater quality standards, encouraged best management practices, required minimum bike parking, and adopted native plant buffers. The planning process included robust public engagement including multiple planning commission meetings, stakeholder interviews, an advisory committee, and a citizen working group to assist in the zoning text development. The City formally adopted the new zoning district in the fall of 2012

### **North Riverfront Land Use Plan, St. Louis, MO**

Stephen was the project manager/project advisor for a 15 month land-use and economic study for 3,000 acres of the North Riverfront of the City of St. Louis. Study analyzed existing market conditions, land-use, transportation, and environmental factors. Coordinated an extensive stakeholder engagement process including businesses, regional agencies, developers, and the public. Public engagement included three public open houses and over 30 stakeholder meetings. Led a large multi-discipline team of consultants including transportation planners, economists, engineers, and urban designers.

### **Howards Bend Land Use Plan, Maryland Heights, MO**

Stephen was an urban planner for this 8,100 acre Land Use Study in the City of Maryland Heights. Coordinated stakeholder interviews and facilitation; agency coordination including Great Rivers Greenway, the water district, St. Louis County Parks, and developers; and the development of conceptual land use and analysis. The project included a future land use plan that attempted to balance current development pressures, the highest-best use for the land, future transportation needs, and environmental impacts

### **AIA Sustainable Design Team, Pittsfield, Massachusetts**

Stephen was a planning team member for a six member volunteer team as part of the American Institute of Architects (AIA) Sustainable Design Assessment Team (SDAT). The team looked at short term and long term sustainable strategies for Pittsfield in the areas of natural resources, economic development, heritage preservation, and neighborhood planning.

### **Community Policy – St. Clair County Complete Streets**

Stephen was the project manager working with three communities in St. Clair County (Fairview Heights, Belleville, and Smithton) which developed 8-10 person citizen committees that evaluated existing city policies such as zoning, comprehensive plans, and subdivision regulations. Worked with each committee to develop a vision for Complete Streets and to prioritize recommendations to existing community policies.

### **Community Land - Use Charrette, St. Roberts, MO**

Stephen developed a public involvement schedule for a two-day community charrette held in St. Roberts, Missouri. As an entry town for Fort Leonard Wood military base, St. Roberts had a strong need for pedestrian and bicycle connections from the base to businesses within St. Roberts. The two-day charrette and public involvement process brought out opportunities and strategies for urban revitalization, urban design, and pedestrian / bicycle connections within the community.



Stephen presenting to a community audience as part of an open house for the Lake Saint Louis Comprehensive Plan.



Part of the comprehensive land-use plan for the North Riverfront Commerce Corridor. The plan identified strategies to leverage significant public and private sector investments



Stephen developed community master and land-use plans as part of transit oriented development evaluation for the North/South MetroLink Alternative Analysis

resume continued:  
Stephen Ibendahl, ASLA, RLA

**Laura Linn**  
The i5Group



**Background**

A professional illustrator and master of perspective drawing techniques, Ms. Linn has created stunning, award-winning imagery for design presentations large and small at any stage of the design process. 20+ years of design, rendering & watercolor illustration experience in the field of architecture, landscape and urban design planning, combined with a diverse variety of design styles and project areas located worldwide has supported a wealth of experience in the architectural building industries of health care, education, commercial, retail, science & technology, urban planning, landscaping, government, amusement parks and recreation. Many projects have been LEED certified buildings or other sustainable design efforts.

**Experience**

Created winning presentation renderings for architectural or urban design presentations and marketing, or renderings for facility donors.

**Awards & Publications**

Awards of Excellence in the American Society of Architectural Illustrators annual competition & exhibitions, Architecture In Perspective.

**Skills**

Watercolor rendering, color pencil rendering, architectural line work and perspective drawing, presentation perspective renderings, architectural and urban planning design conceptual sketches & vignettes, and Adobe Photoshop CS3.

Education

Ranken Technical College 1990  
St. Louis, MO  
Architectural Design & Drafting Associates

Affiliations

American Society of Architectural Illustrators (ASAI), 1993-present

Experience

Laura Linn Illustrations  
2010 - Present

Architectural Illustrator/Delineator  
April 1993 to November 2010  
Hellmuth, Obata + Kassabaum, Inc. - St. Louis.

Civil & Structural Drafter  
May 1989 to March 1993  
Gates Associates, Inc. - Collinsville, IL



## Sean Thomas

The i5Group



Sean is an expert in stakeholder communications and working with community groups in developing a shared vision. Prior to his work with the i5Group, Sean was the Executive Director of the Old North St. Louis Restoration Group where his coordination of a broad range of initiatives addressed the physical and social development of the economically and racially diverse, urban core Old North St. Louis neighborhood – and guided the organization through major, multi-year, neighborhood-wide transformation.

### Areas of Expertise

- Community-Driven Development Planning
- Sustainable Community Development
- Community Engagement Strategies
- Marketing and Media Relations
- Non-Profit Fund Development
- Project Management
- Strategic Planning

### Experience

#### The i5Group

Sean has facilitated i5Group community meetings as part of the Madison County Comprehensive Plan and the Lake Saint Louis Comprehensive Plan.

#### Executive Director, Old North Saint Louis Restoration Group, St. Louis, Missouri.

- Responsible for overall administration and management of not-for-profit, community development corporation pursuing comprehensive revitalization of the Old North St. Louis neighborhood, including:
- Supervision & training of professional staff and volunteers;
- Oversight and management of ONSLRG's housing initiatives;
- Supervision of Old North Grocery Co-op manager (2010-'12);
- Fundraising & grant management, including administration of federal, state, local and private grants;
- Coordination of broad range of initiatives addressing the physical and social development of the economically and racially diverse, urban core Old North St. Louis neighborhood – and guiding the organization through major, multi-year, neighborhood-wide transformation.

#### Deputy Director, St. Louis Association of Community Organizations (SLACO), St. Louis, Missouri.

- Supervision & training of organizing staff and staff of youth center;
- Outreach to expansion areas;
- Development and management of SLACO's Neighborhood Leadership Academy;
- Fund-raising, incl. administration of federal, state, & private grants;
- Coordination of the St. Louis Neighborhoods Conference, including selection of workshop topics, recruitment of presenters, funding support.

#### Education

St. Louis University, Saint Louis, Missouri  
Master of Arts in Public Administration, May 1991

Trinity University, San Antonio, Texas  
Bachelor of Arts in Political Science, May 1987

#### Notable Outcomes while at Old North Saint Louis Restoration Group

- 28% population growth, according to 2010 Census.
- 42% reduction in overall crime, 2010-2015
- National Award for Overall Excellence in Smart Growth Achievement, from U.S. Environmental Protection Agency, 2011
- Multiple awards for historic preservation, from National Trust for Historic Preservation, Missouri Preservation, and Landmarks Assn. of St. Louis.
- Riverfront Times' "Best Place to Live" in 2015 "Best of St. Louis" List.



Sean working with attendees at a comprehensive plan open house.



# Allison Gray, CPRC

DIRECTOR | RESEARCH  
Colliers International | St. Louis



[allison.gray@colliers.com](mailto:allison.gray@colliers.com)

## EDUCATION OR QUALIFICATIONS

Southern Illinois University  
Edwardsville - Master of  
Science in Economics and  
Finance

Southern Illinois University  
Edwardsville - Bachelor of  
Science in Business Economics  
and Finance

## AFFILIATIONS OR MEMBERSHIPS

Commercial Property Research  
Certification (CPRC)

Urban Land Institute (ULI)

## CONTACT DETAILS

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FAX +1 314 863 4407

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St. Louis, MO, 63105

[colliers.com/st.louis](http://colliers.com/st.louis)

## AREA OF EXPERTISE

Allison joined Gateway Commercial, now Colliers International, in May 2010 and performs economic and statistical analysis to develop accurate and timely market data covering the St. Louis region. Allison is responsible for the collection, analysis, and reporting of market research. She prepares market reports and presentations, compiling, calculating and analyzing markets statistics, for the St. Louis office and industrial real estate markets as well as for client-specific projects.

Allison maintains a market transaction database, continually ensuring the accuracy and validity of the information. She produces statistical and trend analysis materials to assist the transactions services professionals to best meet the needs of their clients.

Allison develops and implements the company's research strategy ranging from database creation, data quality control, statistical interpretation, trend analysis and ways in which the research system can best be transformed into usable reports. She is responsible for producing all reports and data for use in analysis, marketing and presentations to corporate clients. She is dedicated to creating meaningful statistics reports that contain impactful information in an approachable way. Allison is active in the market, participating in events with local industry experts in order to remain up-to-date on the St. Louis market conditions.

## BUSINESS AND EDUCATIONAL BACKGROUND

Allison began her career in commercial real estate nearly 8 years ago as a research associate with Gateway Commercial, a Cushman & Wakefield affiliate in St. Louis. She escalated to the director of the research department with Gateway and subsequently, Colliers International | St. Louis.

## COMMUNITY INVOLVEMENT

Allison is an active member of the Urban Land Institute (ULI). She is a proud St. Louis City resident and enjoys that her work at both Colliers and ULI allows her to impact her city in a positive way.

Allison is currently a member of the ULI Programs Committee and the Women's Leadership Initiative. Most recently, she organized the "Why Every Neighborhood Needs a Brewery" program which highlighted the growth of the craft brewery industry and its impact on the revitalization of neighborhoods throughout St. Louis.



## Jacqueline Davis-Wellington

*Co-Founder and Managing Partner*



### **Education:**

**B.S.B.A., Washington University in St. Louis**

**M.S., Urban Affairs and Policy Analysis, Washington University in St. Louis**

Jacqueline Davis-Wellington serves as Managing Partner of CED Solutions, responsible for overall coordination of all projects and staff. She brings extensive project management experience in all aspects of major redevelopment/construction and strategic planning activities. She has successfully secured more than \$35 million in federal grants from EDA, HUD, EPA, OEA, FTA and other federal agencies to support redevelopment activities; and more than \$65 million in Missouri Brownfield and Super TIF tax credits.

Ms. Wellington previously served as Executive Vice President and Chief Operating Officer for the St. Louis Economic Development Partnership. She was directly responsible for oversight of the Real Estate and Community Development, Legal, Human Resources, Accounting, and Marketing and Communications divisions. She led the Land Clearance for Redevelopment Authority of St. Louis County, St. Louis County Port Authority, Lambert Airport Eastern Perimeter Joint Development Commission, and Wellston Redevelopment Corporation. She was also responsible for the negotiation of property acquisition, public private partnerships, intergovernmental agreements and CDBG Administration and Grant Compliance.

Previously, Ms. Wellington held positions in the construction industry, overseeing environmental remediation and commercial construction projects. She was a Community Development Specialist for the City of St. Louis, monitoring compliance with HUD CDBG rules and regulations, and was an Academic Counselor at the University of Missouri–St. Louis. She has served on a wide range of nonprofit boards and advisory committees for state and local governments and civic organizations, including a 10-year term on the Missouri State Board of Education. The many awards she has received include EDA “Women in Leadership,” Winning Women’s “Women Influencing Now,” St. Louis Business Journal’s “Most Influential Minority Business Leader,” and Girl Scouts of Eastern Missouri’s “Women of Distinction. Ms. Wellington is a licensed real estate agent in Missouri.



## **Elizabeth A. Noonan**

*Partner*



### **Education:**

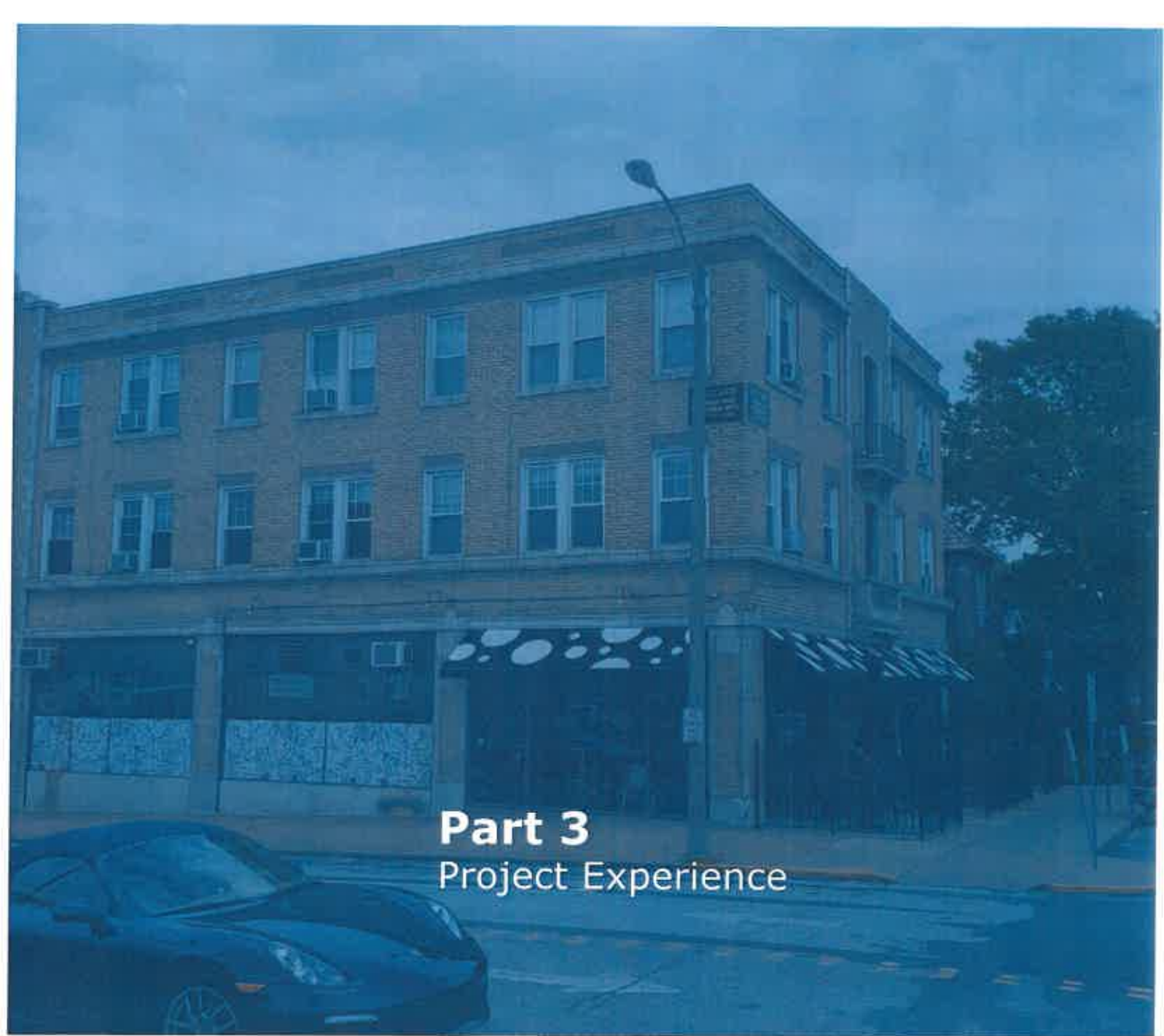
B.A., Brown University  
J.D., Washington University  
School of Law  
M.S.W, Social & Economic  
Development, Washington  
University in St. Louis

Elizabeth A. Noonan brings over fifteen years of experience in economic and community development with significant focus on real estate and community redevelopment and innovation and entrepreneurship initiatives. Ms. Noonan joined the St. Louis Economic Development Partnership in 1998 and throughout her tenure, was responsible for developing the direction, strategy and structure of multiple economic and community development projects, ranging from implementation of a comprehensive redevelopment plan in Wellston, Missouri to the development of the Helix Center Biotech Incubator.

At the Partnership, Ms. Noonan first served in progressively more responsible roles in the real estate and community development division. Her real estate work included managing project pre-development activities, including planning, property acquisition, environmental remediation and demolition. She also supervised building and infrastructure improvement projects from design through construction. Additionally, she was responsible for researching, drafting and managing multiple federal state and private grants in support of these projects.

With a strong interest in innovation, Ms. Noonan next led the organization's bioscience and technology initiatives and then served as vice president of the innovation and entrepreneurship division, with responsibility for leading the Partnership's small business incubator network, its biosciences and technology investment fund, business plan competition and a range of collaborative innovation programs with community partners, particularly in the biosciences and technology sectors.

In 2014, Ms. Noonan joined SSM Health in the role of system vice president, innovation and learning to launch the organization's first centralized innovation and learning division, responsible for developing and delivering clinical, innovation and process improvement education and for developing the health care system's infrastructure for fostering employee innovation.



**Part 3**  
Project Experience

**Part 3**  
Project Experience

# Project Experience



**Key Personnel Involved:**  
 Stephen Ibendahl, ASLA, AICP  
 Laura Linn  
 Sean Thomas  
 Jacqueline Davis-Wellington  
 Beth Noonan  
 Allison Gray

**Year Completed:**  
 2019

**Client / Organization:**  
 City of Fairview Heights

**Reference:**  
 Paul Ellis, CEED, AICP  
 Director of Economic Development  
 City of Fairview Heights  
 10025 Bunkum Road  
 Fairview Heights, IL 62208  
 618-489-2033  
 ellis@cofh.org

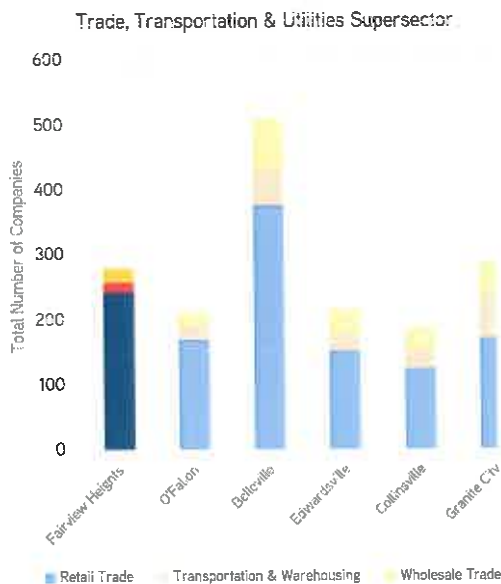
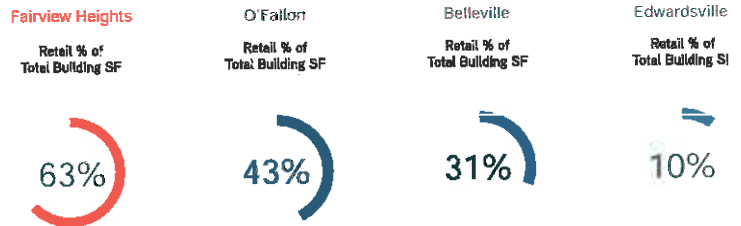
**Scope of Work:**  
 Economic Development Strategy

The i5Group was the prime.

## Fairview Heights Economic Development Strategy

The i5Group, along with CED-S and Colliers, is leading an economic development strategy for the City of Fairview Heights. The strategy will position the City on its path toward a resilient economy by creating a vision around which the City with its public, private and institutional partners can coalesce efforts to drive investment and growth for the community.

The Economic Development Strategy will become a “tool kit” adopted by the City. Implementation is expected to include: recommendations on policy changes for the City to achieve economic growth; recommendations for any structural changes needed within the City’s Economic Development Department; increased collaboration between the City’s Economic Development Department and other economic development network partners that could bring greater economies of scale and help achieve strategic objectives; and identifying metrics for the



# Project Experience



**Key Personnel Involved:**  
Stephen Ibendahl, ASLA, AICP  
Laura Linn  
Laura Schatzman

**Year Completed:**  
2016 - 2017

**Client / Organization:**  
City of Lake Saint Louis

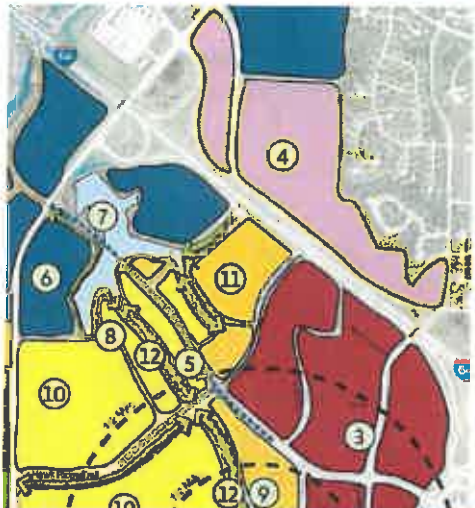
**Reference:**  
Paul Markworth  
City Administrator, City of Lake Saint Louis  
200 Civic Center Drive  
Lake Saint Louis, MO 63367  
(636) 625-1200  
pmarkworth@LakeSaintLouis.com

**Scope of Work:**  
Comprehensive Planning  
Small Area Planning  
Public Engagement  
Market and Economic Analysis  
Project Website and Social Media

The i5Group was the prime.

## City of Lake Saint Louis Comprehensive Plan

Since incorporation in 1975, Lake Saint Louis has grown, without a comprehensive plan, to be one of the premier cities in the region. However, the city realized the retain a high quality of life as the city grows, thoughtful planning through a comprehensive plan was required. The i5Group led the overall planning and community engagement process. The planning process included an assessment of existing resources and issues, projections of future conditions and needs, and consideration of collective goals and objectives. The plan covered topics such as economy and jobs; housing; demographics; transportation; land use; parks, recreation, and open space; utilities; and community facilities and services. The plan developed sub-area plans for the Uptown area and the undeveloped area west of the Shoppes at Hawks Ridge. The plan received the 2019 'Outstanding Plan Making' Award by the St. Louis Metro Section of the American Planning Association.



[www.MyFutureLakeSaintLouis.com](http://www.MyFutureLakeSaintLouis.com)

# Project Experience



**Key Personnel Involved:**  
Stephen Ibendahl, ASLA, AICP  
Tim Sullivan  
Laura Linn  
Sean Thomas

**Year Completed:**  
2017 - 2018

**Client / Organization:**  
Madison County, Illinois

**References:**  
Matt Brandmeyer  
Director, Madison County Planning  
and Development  
(618) 296-4468  
mabrandmeyer@co.madison.il.us

**Scope of Work:**  
Comprehensive Plan  
Community Engagement  
Market and Economic Analysis  
Scenario Planning

The i5Group was the prime

## Madison County Comprehensive Plan

The Madison County Plan Commission started a process in 2016 to update the County's Comprehensive Plan. The Comprehensive Plan acts as the official land use plan for unincorporated Madison County and will be used to guide future growth and act as the policy basis for land use decisions.

The i5Group facilitated the Plan Commission to review existing conditions and demographic data, identify county-wide priorities, and develop an overall framework for the comprehensive plan.

The i5Group is leading the overall planning process. The i5Group led a community engagement process including a county-wide survey, open houses, and a technical advisory committee. The i5Group utilized market and growth analysis to analyze possible growth scenarios for the county based on recent growth patterns versus a more community focused approach.

The framework of the plan is rooted in core county values, including Strong Communities; Prosperous Agriculture; Treasured Homes and Property; Abundant, Healthy, and Beautiful Open Spaces and Natural Resources; Prosperous Economy; Robust and Efficient Transportation Network; and Low Cost of Living.

For more information, visit [www.OurFutureMadisonCounty.com](http://www.OurFutureMadisonCounty.com)



# Project Experience



**Key Personnel Involved:**  
 Stephen Ibendahl, ASLA, AICP  
 Laura Linn  
 Sean Thomas  
 Jacqueline Davis-Wellington  
 Beth Noonan

**Year Completed:**  
 2018 - 2019

**Client / Organization:**  
 City of Ballwin

**References:**  
 Andy Hixson, ICMA-CM  
 Director of Development / Assistant  
 City Administrator  
 14811 Manchester Road  
 Ballwin, Missouri 63011  
 636-227-2243  
 ahixson@ballwin.mo.us

**Scope of Work:**  
 Comprehensive Planning  
 Community Engagement  
 Market and Economic Analysis

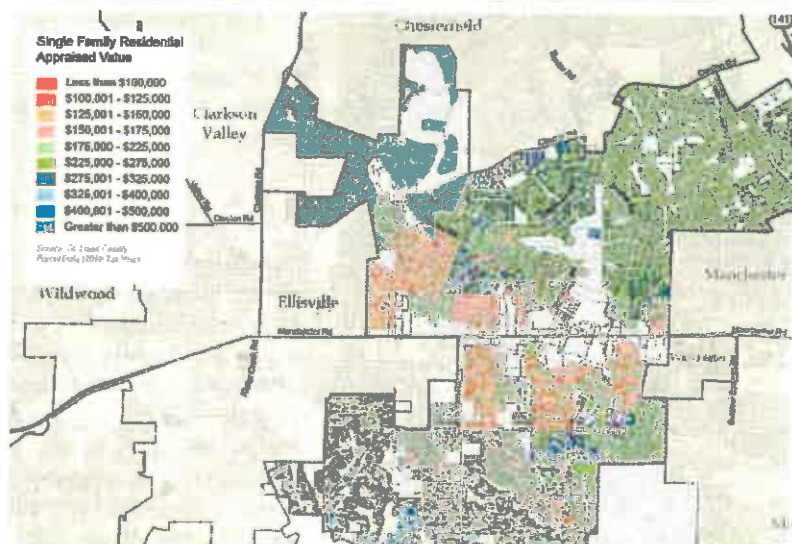
The i5Group was the prime

## Ballwin Comprehensive Plan

The i5Group is leading the Comprehensive Plan for the City of Ballwin, Missouri. Other project partners include Community and Economic Development Solutions and T2 Traffic and Transportation. Ballwin is a city with a population of over 30,000 and has been named multiple times as “One of America’s Best Places to Live” by Money Magazine.

The planning process began in Spring 2018 and will last approximately 12 months. A robust community engagement process includes three open houses, surveys, small group meetings, a website, and social media.

The planning process includes an assessment of existing resources and issues, projections of future conditions and needs, and consideration of collective goals and objectives. The plan will cover topics such as economy and jobs, housing, demographics, transportation, land use, utilities, and community facilities and services.



# Project Experience



Aerial view of the NorthPark site.

## NorthPark Business Park

Community and Economic Development Solutions (CED-Solutions) founders developed an intergovernmental agreement that allowed for development of the land, now know as NorthPark, as a single business park. The new structure governing the property attracted a consortium of private developers to redevelop the site as a business/industrial park in a comprehensive unified manner that maximized its economic and community impact. NorthPark is now home to the headquarters of Express Scripts, its Technology and Innovation Center and Data Center, Vatterott College, a Hilton Garden Inn, a multi-tenant commerce center, an SKF manufacturing facility and a distribution center for Schnucks Markets. To date, over 9,000 jobs have been created with a total investment of over \$550 million.



STLVenture Works facility.

## Small Business Incubator Network

Small businesses are critical to a strong and healthy economy. Fostering their success is a key element of the economic development playbook. Community and Economic Development Solutions (CED-Solutions) principals have led the development and operation of a regional incubator system that serves entrepreneurs across the St. Louis area. The five geographically diverse locations represent strategic decisions to locate these economic engines in areas with potential for growth and to spur additional investment while serving a broad range of entrepreneurs. The incubator network offers early stage companies from main street businesses to high tech start-ups the business development support and resources they need to grow.



Stephen discussing meeting materials with attendees.

## North Riverfront Land Use Plan

Stephen Ibendahl was the Project Manager/Project Advisor for a 15 month land use and economic study for 3,000 acres of the North Riverfront of the City of St. Louis for the St. Louis Development Corporation (SLDC). Study analyzed existing market conditions, land use, transportation, and environmental factors. Public engagement included three public open houses and over 30 stakeholder meetings. The final plan included recommendations for land use districts and future development, market and job assessments, transportation and freight recommendations, green infrastructure strategies, marketing and branding products, and business group formation recommendations.



The plan identified nodes of priority economic development.

## College Hill Neighborhood Comprehensive Plan

Community and Economic Development Solutions (CED-Solutions) along with the i5Group is leading a comprehensive plan for the College Hill neighborhood in the City of St. Louis. The plan identifies opportunities for residential and commercial development as well as pre-development actions or investment necessary to spur new activity; identifies key areas for public investment (e.g., infrastructure, demolition) that support community development goals; provides recommendations for partnerships that support development of employment or training opportunities and investment in College Hill; and recommend strategic partnerships that advance development and community investment.





**i5** The i5 Group  
Urban & Community Planning | Public Affairs | Landscape Architecture  
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www.thei5group.com



CITY OF UNIVERSITY CITY  
MISSOURI  
ECONOMIC DEVELOPMENT STRATEGIC PLAN  
MAY 10, 2019

UNIVERSITY CITY  
ECONOMIC  
DEVELOPMENT  
STRATEGIC PLAN



Submitted by:  
**Future iQ, Inc.**  
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Minneapolis, MN 55424  
[www.future-iq.com](http://www.future-iq.com)

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



Create Future Intelligence®

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Minneapolis, MN 55424  
US Federal Tax Number:  
EIN: 27-1389416

May 10, 2019

Libbey Tucker  
Director of Economic Development  
City of University City  
6801 Delmar Boulevard  
University City, MO 63130

**RE: RFP for an Economic Development Strategic Plan**

Dear Ms. Tucker,

Future iQ is pleased to submit this proposal to serve as the consultant team to develop an Economic Development Strategic Plan for the City of University City.

Future iQ has a strong track record of designing and implementing large-scale strategic planning projects across North America, Europe and Australia. With over 50 major planning projects completed, some of the strengths we believe we bring to this project include:


- **We understand the economic and workforce development landscape and collaboration building.** Future iQ has delivered comparable projects across a range of industries and jurisdictions. This includes projects based around regional economic adjustment and planning. For example, we are currently working with the City of San Diego, California, to build an economic and workforce strategy for the defense industry cluster, and recently developed an economic development strategy for the Edina Chamber of Commerce in Minnesota.
- **Future iQ has solid technical and regional expertise.** Our work includes numerous similar projects that have involved facilitated processes and research to produce collaborative strategic plans, network mapping, supply chain analysis, stakeholder communication plans, regional economic development feasibility studies, vertical market assessments and workforce needs analyses. We have applied this expertise in over 50 major regionally based projects in United States. This intimate understanding of local and regional economies will be invaluable in this project. Our projects aim to deliver robust plans, but also foster innovation, entrepreneurship and creative approaches to economic development.
- **We specialize in strategic planning, visioning 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 to create collaborative and cohesive economic development

plans, and an aligned vision for the future. Importantly, our planning process provides a collaborative place for participants to share expertise and ideas, and to openly consider various perspectives on issues of concern to their industry. We have a team of accomplished facilitators who are well versed in steering stakeholder discussions, and exploring local sensitivities and aspirations.

- **We understand the need for balanced development.** We have worked with many cities, towns, counties and regions at points-in-time when communities have reached generational change, industry tipping points, and other scenarios that involve significant redevelopment phases. For example, our work with the City of Edina in Minnesota involved extensive public engagement with businesses, neighborhood and housing associations, community organizations and individual homeowners as they dealt with issues such as 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 University City's planning process.
- **We bring a future perspective.** Future iQ specializes in studying and understanding larger emergent trends and influences that are re-shaping industries and regions. We have also published foresight research on the 'Future of Manufacturing', 'Cities of the Future', 'Economics of Collaboration', and the 'Future of Food'. In 2012, we hosted a global Think Tank forum at Windsor Castle (UK) on 'Building Sustainable Regional Communities' and hosted an additional Think Tank forum there on 'The Future of Urban Living' in December 2018. This experience and knowledge helps us shape truly future oriented planning processes.
- **We understand the power of good data.** Future iQ specializes in sophisticated data collection and analysis. We believe that good stakeholder engagement processes and data collection, presented in a transparent and interactive manner, can help build rapid alignment around key points of consensus.

Future iQ delivers innovative and customized projects on time and on budget. Our hands-on approach, as well as the effectiveness of our methodology, will help the stakeholders of University City to maximize the value of the planning process and achieve realistic actionable outcomes. This will lead to the creation of an Economic Development Strategic Plan that can be supported by key stakeholders. It would be our privilege to work with the City of University City on this initiative. Please contact me for clarifications as needed. Thank you for your consideration.

Yours sincerely,



David Beurle  
CEO, Future iQ, Inc.  
Tel: 612-979-9190  
Email: david@future-iq.com

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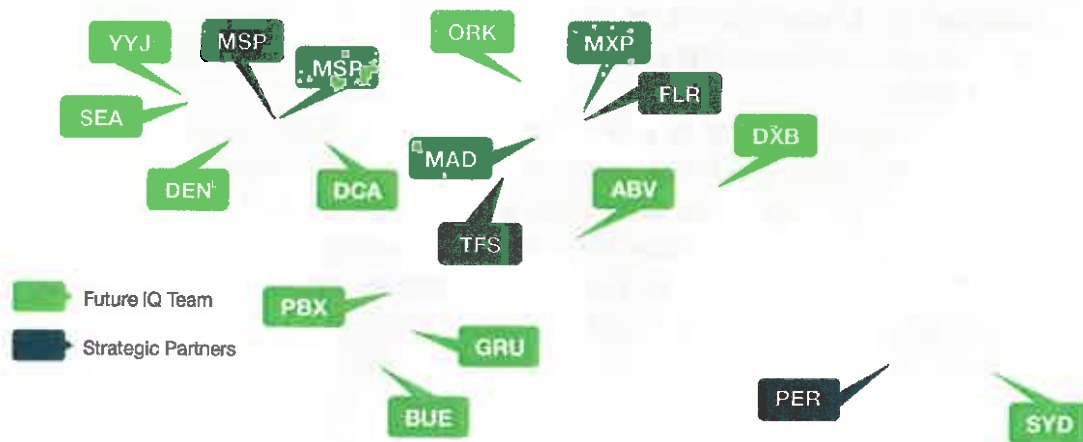
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## 1.0 Consultant Qualifications

### 1.1 Firm Background – About Future iQ

Future iQ is a global research and consulting company specializing in visioning, economic development and strategic planning for regions, cities, counties, communities, and industries. Founded in 2003, Future iQ's global footprint brings a broad perspective and delivers transformational customized solutions to local environments. With 7 staff members, 4 strategic partners and 4 country representatives, Future iQ's clients span North America, Europe and Australia. Future iQ works across cultures, sectors and languages to shape unique and effective planning solutions that span regions and sub-regions. The Team assigned to this project has extensive experience in visioning, economic development and strategic planning projects in the United States.



Future iQ specializes in the following functional and sector areas:

- City, Urban and Regional Planning
- Economic and Workforce Development
- Defense Sector Engagement
- Organizational and Corporate Planning
- Non-profit Strategic Planning
- Tourism Industry Planning and Analysis

Future iQ's specialized methodology includes:

- Strategic Planning and Visioning
- Stakeholder Engagement
- Network and Supply Chain Mapping
- Data Visualization
- The Future Game
- Customized Foresight Research

For more information, please visit Future iQ's website at: <http://future-iq.com>

## 1.2 Related Firm Experience

A key feature of Future iQ's work includes economic development and strategic planning projects for cities, counties, nonprofit organizations, and regions. Below are examples of related firm experience. Please also visit <http://future-ig.com/featured-projects/>.

### Visioning, Economic Development, and Strategic Planning – Example Projects

- Tillamook County, OR, Tourism Investments Strategic Vision and Action Plan (2018-present)
- National Association of Development Organizations, Washington DC, Nationwide Strategic Plan (2018-present)
- Maine Woods Regional Tourism and Economic Development, ME (2017-present)
- Edina Chamber of Commerce Economic Development Strategy, MN (2016-2017)
- Edina Chamber of Commerce Medical/Well-Being Destination Strategic Marketing Plan, Edina, MN (2018-present)
- Clearwater Economic Development Association, ID, Visioning and Economic Development Leadership Training (2018-2019)
- Moosehead Lake Region Economic and Development Corp., ME, Strategic Action Plan (2016-2017)
- Global Foresight Consultations at Windsor Castle, U.K. (2012 and 2018)
- Mitchell, SD, Community Vision and Strategic Action Plan (2019-present)
- City of Smithville, MO, Community Vision and Strategic Action Plan (2019-present)
- Park City, UT, Community Vision and Action Plan (2019-present)
- B.E.S.T. of Waseca County, MN, Visioning and Strategic Action Plan (2017-2018)
- City of Coppell, TX, Vision and Strategic Plan (2018-2019)
- City of Trotwood, OH, Organizational Strategic Plan (2019 – present)
- Town of Hilton Head Island, SC, Vision and Strategic Action Plan (2016-2018)
- Future of Midwest Agriculture, University of Minnesota (2017 – 2018)
- Snohomish County, WA, Tourism Destination Development (2017-2018)
- Travel Oregon, OR, Statewide Regional Tourism Planning (2016-present)
- Province of Alberta, Canada, Regional and Economic Development (2009-2014)
- City of Edina, MN, Community Visioning and Comp Plan Bridging (2014-2017)
- Nationwide Strategic Plan for RCAP, Washington, DC (2018)
- City of Wayzata, MN, Community Visioning, (2017-2018)
- North Tyrrhenian Sea-Mediterranean Ports Project, Italy/France (2015-16)
- Kewaunee Regional Action Plan, WI (2013-2014)
- Mountains of Leon, Northern Spain (2013-2014)
- Mobilize Maine: Asset-Based Regional Economic Development, ME (2010-2014)

For detailed project descriptions, please see **Appendix A**.



### **1.3 Department of Defense, Office of Economic Adjustment Projects**

Future iQ has facilitated OEA funded projects since 2008 because of its ability to bring stakeholders together to tackle real issues of economic adjustment and opportunity facing local and regional communities throughout the United States. The OEA used Future iQ as a model of this excellence when it consulted Future iQ's CEO, David Beurle, to contribute his expertise to its communications and public outreach sections in the 2013 publication, *Local Official's Guide to Defense Industry Adjustment*. [https://future-iq.com/wp-content/uploads/2015/10/GV4501104 DoD OEA-Guide v7 SinglePages.pdf](https://future-iq.com/wp-content/uploads/2015/10/GV4501104_DoD_OEA-Guide_v7_SinglePages.pdf)

Below is a list of seven Future iQ OEA projects.

#### **1.3.1 State of VT, VT – OEA Grant Management and Regional Collaboration (2019-present)**

Future iQ has been contracted by the State of Vermont to facilitate OEA grant program management and regional collaboration for the six New England states that make up the New England Collaborative. This project will involve background research and interviews of key stakeholders, the Collaborative Future Think-Tank, identifying and building linkages and partnerships within New England defense clusters, network mapping, sustainability planning, governance support, advocacy, and event travel on behalf of the Collaborative. Project publications will include a Scenarios of the Future Report, a Strategic Action Plan, and Board of Directors' governance documents. <http://future-iq.com/project/new-england-regional-defense-industry-collaboration-usa-2019-20/>

#### **1.3.2 City of San Diego, CA – Regional Economic Planning Project (2016-present)**

Future iQ has been contracted by the City of San Diego, as part of a Department of Defense, Office of Economic Adjustment funded project (Phases One and Two). This area is home to the largest concentration of military assets in the world. The Future iQ work has included the facilitation of Regional Leadership Group meetings, network mapping, economic data collection and analysis, scenario planning and visioning, stakeholder engagement and the Propel San Diego Strategic Roadmap detailing the outcomes of the 2016 grant award to the City of San Diego. <http://future-iq.com/project/city-san-diego-california-usa-2016-17/>

#### **1.3.3 Middle Georgia Economic Alliance, GA (2018)**

Future iQ was contracted by the Georgia Department of Economic Development (GDEcD) to produce an innovative strategic roadmap and regional Plan for Action that will build economic resiliency and guide the region's stakeholders well into the future. The Plan for Action will be used by Middle Georgia communities and companies in the region to guide and inform leadership and stakeholders of the array of development opportunities available to them. The project included extensive community engagement, charrettes, network mapping, data

collection and visualization and the production of a final report. <https://future-iq.com/project/middle-georgia-economic-alliance-usa-2018/>

#### **1.3.4 New Hampshire Aerospace and Defense Consortium (NHADEC), NH (2017-2018)**

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

#### **1.3.5 Regional Collaborative Growth Plan, Greater Lima Region, OH (2015-2017)**

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

#### **1.3.6 Oshkosh Initiative, WI – Regional Collaborative Action Plan (2014-2016)**

Future iQ was contracted to design and lead a 5-county Fox Valley 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. The project involved detailed network mapping, the development of an East Central Industry Diversification Strategy, and a charrette planning process to develop a Regional Collaborative Action Plan. <http://future-iq.com/project/fox-valley-wisconsin/>

#### **1.3.7 Texarkana, Texas - Strategic Implementation Plan (2015)**

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

## 1.4 Project Team Qualifications

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

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

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

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

Team Member	Title	Role
David Beurle	CEO, Future iQ, Inc.	Project Director, Facilitation, Strategy Development
Jim Haguewood	Economic Development Specialist	Economic Analysis, Facilitation
Heather Branigin	VP, Foresight Research	Research, Strategy Development, Engagement, Writing
Walter Paixao-Cortes	Data Engineer	Data Analysis and Visualization
Tobiloba Adaramati	Data Analyst	Data Analysis

## 1.4.1 Project Director, David Beurle, CEO, Future IQ

### RÉSUMÉ



#### DAVID BEURLE

david@future-iq.com

#### EDUCATION

Bachelor Degree in Agricultural Science, University of Sydney, 1984

#### EMPLOYMENT

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

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

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

#### PHILANTHROPIC WORK

Board Director, Western Australian Community Foundation, 2003-2005

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

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### 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 30 countries. As CEO of Future IQ, David has led global projects across 4 continents and has written and contributed to a number of foresight papers. Having worked in the field of organizational and regional economic and community planning for over 20 years, his work has won numerous awards. David has a major role in Future IQ projects as lead consultant and director of projects.

#### RECENT PROJECT EXPERIENCE

- Future of Urban Living Think Tank, St Georges House, Windsor Castle, UK, 2018-2019
- Middle Georgia Regional Defense Industry Economic Diversification Project 2017 - 2018
- City of Coppell, Texas, Community Visioning 2018 - 2019
- Snohomish County Washington, Tourism Implementation Plan 2017 - 2018
- Maine Woods, Tourism Impact Study 2017 - 2018
- City of San Diego Defense Industry Economic Development Plan, California, US, 2016 - 2018
- North Coast, Oregon, Tourism Destination Management, 2014 - 2019
- Hilton Head Island, South Carolina, Community Visioning project, 2016 - 2017
- Task Force LIMA Defense Initiative, Ohio, US, 2015 - 2017
- National Congress of American Indians, Future Game development, 2016 - 2018
- City of Weyzata, Minnesota, US, Community Visioning 2017 - 2018
- Moosehead Lake Regional Master Plan, Maine, US, 2016 - 2017
- Edna 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
- Vadnia Project, Leon, Northern Spain, 2014
- Agriparco Montepartito, Tuscany, Italy, 2014
- Govt. of Alberta Small Business Strategy, Canada, 2013
- Steering it Forward North East Nevada, US, 2013
- Mount Pieme Project, Australia, 2013
- Menominee Economic Adjustment Project, Wisconsin, US, 2013
- Global Think Tank, Windsor Castle, UK, 2012
- Future West Cork, Ireland, 2009 - 2012
- Pelliser Futures Project, Alberta, Canada, 2009
- Winnemucca Futures Project Nevada, US, 2009

#### RECENT PUBLICATIONS

- Future of Tourism, 2018
- The Next Industrial Revolution, 2018
- The Future of Midwest Agriculture, 2017 - 2018
- The Future of Manufacturing, 2016
- The Future of Food, 2016
- Economics of Collaboration, 2015
- Cities of the Future, 2015
- Building Sustainable Regional Communities, Windsor Castle, UK, 2012
- The Futures Game: A Scenario game Workshop Package to Engage Future Thinking, 2009
- Development of a Process to Turn Plausible Scenarios into On-Ground Action, 2009

#### KEYNOTE PRESENTATIONS

- New Mexico Infrastructure Finance Conference, October 2018
- Association of Emergency Managers, Minnesota, September 2018
- Tourism Industry Summit, Snohomish County, Seattle, May 2018
- McHenry County Community College, Future Planning Think Tank, June 2018
- National Association of Development Organizations, Think Tank, La Jolla California, US June 2018
- Scottish International Business Week, Edinburgh, Scotland, Sept 2018
- 22nd Annual Recycling Association of Minnesota (RAM) / Solid Waste Association of North America (SWANA) Conference & Show, Keynote Speaker (October 2017)
- Future of Southern Minnesota, Community Vitality Summits (with Congressman Tim Waltz) April 2018
- Aggregate & Ready Mix Association of Minnesota (ARM) Annual Convention, Minneapolis, USA (November 2017)
- National Congress of American Indians - customised Future Game (October 2017)
- 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 2015)
- North Tyrrhanean Sea - European Union Port Project, Italy and France (February 2015)
- St George's House, Windsor Castle, UK - Building Sustainable Regional Communities (2012)

## 1.4.2 Jim Haguewood, Economic Development Specialist

### RÉSUMÉ



#### EDUCATION

B.A. Hotel and Restaurant Management,  
Washington State University, 1982

#### EMPLOYMENT

Owner, Senior Partner, ONE Group, LLC  
Port Angeles, WA, 2005 - present

Senior Partner, VITAL Economy Alliance,  
Baltimore, Maryland, 2005 - present

Executive Director, Clallam County Economic  
Development Council, Washington, 2000-2005

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### JIM HAGUEWOOD, B.A.

#### ECONOMIC PLANNING SPECIALIST

Jim Haguewood specializes in stakeholder and community engagement that utilizes asset based principles and tools, such as SMART strategies and innovative ways to generative new economic value in rural regions. He led an industry cluster based strategy, Clallam netWorks, that received the Washington State 2003 Governor's Economic Development Award for "Unique Partnerships" resulting in historic economic improvements, including creating 9,000 jobs and increasing retail sales by 35% in four years. The success of this work motivated Jim to bring his experience and keys to success to other economically distressed or transitioning communities. Jim has co-authored white papers and has been recognized in economic development and association publications.

In 2015, Jim was a member of the consultant team selected to complete a Tourism Master Plan for an eight county Indianapolis region. The Tourism Master Plan is a next generation planning roadmap that connects tourism planning with community economic development and integrates strategies focused on visitor, talent, capital and business attraction and development. Also in 2015, Jim led an analysis of the entrepreneurship climate in Southern Vermont including the feasibility of a business accelerator program. The feasibility was done in conjunction with the launch of a regional industry cluster initiative, Green Economy Innovation Hub.

Most recently, Jim led the development of the Next Generation Strategic Plan for the Northern Maine Development Commission, serving Aroostook and Washington Counties in Maine. Also, provided economic and community development insight to a new brand for Salt Lake, Blueprint Salt Lake and the future of tourism in Snohomish County, Washington State.

#### RECENT PROJECT EXPERIENCE

- Tourism 2.0, Snohomish County, Washington, 2018
- Next Generation Strategic Plan, Northern Maine Development Commission, 2017
- Grand Plan Madawaska, 2017
- Blueprint Salt Lake, 2017
- Propel San Diego, 2016-2017
- Moosehead Lake Regional Master Plan, 2016-2017
- Lakeshore Industry Cluster Initiative, 2012 -2014
- Indianapolis Tourism Master Plan, 2014-2015
- Southern Vermont Green Building Cluster Study, 2015
- SoVermont Business Accelerator, 2015
- Connect Southern Illinois, 2007-2010
- Clallam netWorks, 2000-2005

#### RELEVANT PUBLICATIONS

- The Future of Tourism - Northern Maine Woods, 2018
- Mobilize Maine, Asset-Based Regional Economic Development, NADO September 2011
- Performance Metric Matter, Go Beyond Counting Jobs to Create a Highly Effective Comprehensive Economic Development Strategy, VITAL Economy for NADO August 2012
- Creating a Rural Broadband Strategy that Works: Three Steps to Success VITAL Economy, 2010

## 1.4.3 Heather Branigin, Vice President, Foresight Research

### RÉSUMÉ



#### EDUCATION

Master of Arts in Teaching  
Secondary Level, Social Studies  
University of St. Thomas, MN

Bachelor of Arts in Political Science/  
International Relations  
Advanced Language Certificate: French Literature  
Carleton College, MN

Honours Degree, Neuchâtel Jr. College  
Neuchâtel, Switzerland

#### EMPLOYMENT

Vice President, Foresight Research,  
Future IQ, 2016-present

City of Edina  
Edina, MN, 2013-2016

National Collegiate Conference Association -  
National Model United Nations  
Minneapolis, MN, 2010-2013

United Nations Association of Minnesota  
St. Paul, MN, 2007-2010

#### COMMISSION

Notary Public Commission, Exp. January 2024

#### PHILANTHROPIC WORK

Volunteer judge, Future City Competition, MN,  
2017

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

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

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

#### VICE PRESIDENT, FORESIGHT RESEARCH

Heather began work with Future IQ in 2015 as primary researcher and author of Future IQ's foresight publication *The Future of Food*, and recently co-authored *The Next Industrial Revolution* and *The Future of Tourism*. She has extensive experience in local government and the nonprofit sector, and is an accomplished project manager and research analyst. Heather has a well-developed ability to assimilate information into thoughtful and coherent writing. She applies the integration of future trends, data analysis and public engagement into implementable strategy development for clients. Through her work, Heather seeks to provide that critical resourceful guidance needed to empower communities and organizations to make decisions that build sustainability and resiliency as they face a future of accelerations and change. Originally from Canada, Heather has pursued her international interests through her philanthropic work with the United Nations Association of Minnesota.

#### RECENT PROJECT EXPERIENCE

- City of Mitchell Community Vision and Action Plan, SD, 2019-Present
- Park City Community Vision and Strategic Action Plan, UT, 2019-Present
- Future of Urban Living Global Consultation at Windsor Castle, UK, 2018
- Clearwater Economic Development Association, ID, 2019
- Sustainable Materials Management - Vision for Iowa, Iowa DNR, 2018-Present
- Tillamook County Strategic Vision and Action Plan, OR, 2018-Present
- ECC Medical/Well-Being Strategic Marketing Plan and Economic Development Plan, MN, 2016-2019
- National Association of Development Organizations, Washington, D.C., 2018-2019
- Coppel Vision 2040, Coppel, TX, 2018-2019
- City of San Diego, DEA Grant Facilitation, San Diego, CA, 2016-2019
- Snohomish County Regional Tourism Destination Development, WA, 2018
- McHenry County College, Crystal Lake, IL, 2018
- Rural Community Assistance Partnership, Washington, D.C., 2018
- City of Wayzata Community Vision, MN, 2017-2018
- New Hampshire Aerospace and Defense Export Consortium, NH, 2017-2018
- B.E.S.T. of Waseca, Waseca Vision 2030, MN, 2017-2018
- Edina Nodes and Modes Bridging Sessions, Edina, MN, 2017
- Scott County Visioning and Scenario Planning, MN, 2017
- CAP-FC Vision and Strategic Action Plan, St. Louis Park, MN 2017
- Task Force LIMA Defense Initiative, Allen County OH, 2016-2017
- University of Minnesota, Future of Midwest Agriculture, MN, 2016-2017
- Town of Hilton Head Island Vision and Strategic Action Plan, SC, 2016-2017
- City of Edina, Vision Edina, MN, 2014-2015

#### RELEVANT PUBLICATIONS

- *The Future of Urban Living*, FIQ Foresight Report, 2019
- *Coppel Vision 2040 Strategic Action Plan*, Coppel Community Profile Benchmark Analysis, 2018-2019
- 4 Regional Think-Tank Reports and Building a Sustainable Tourism Industry Report, Snohomish County, WA, 2018
- *The Future of Tourism-The Maline Woods*, FIQ Foresight Report, 2018
- NADO Scenario-Based Think Tank Report, Washington, DC, 2018
- McHenry County College Strategic Foresight Session Report, IL, 2018
- *The Next Industrial Revolution*, FIQ Foresight Report, 2018
- NHADEC Strategic Action Plan and Strategic Planning Think Tank Reports, NH, 2017-2018
- *Waseca Vision 2030 Community Vision and Strategic Action Plan*, Waseca Vision 2030 Think Tank Report, MN, 2017-2018
- Scott County 2040 Vision Update, Scott County Solid Waste Management Scenario-Based Planning Report, SWMO Scenario-Based Planning Report, Scott County, MN, 2017
- CAP-FC Scenario-Based Think Tank Report, Hennepin County, MN 2017
- Propel San Diego Scenario-Based Think Tank Report, San Diego, CA, 2017
- Economic Development Strategy and Stakeholder Engagement Analysis Reports, Industry Cluster and Economic Impact Analysis, Edina Chamber of Commerce, MN, 2016-2017
- An Innovation Framework for the Greater LIMA Region, Allen County, OH 2016
- *The Future of Food*, FIQ Foresight Report, 2016

#### HEATHER BRANIGIN

heather@future-iq.com

## 1.4.4 Walter Paixao-Cortes, Data Engineer

### RÉSUMÉ



#### EDUCATION

Doctorate in Computer Science (Bioinformatics/  
Natural Language Processing)

Pontifical Catholic University of Rio Grande do  
Sul, 2015 to present

Masters Degree In Computer Science  
(Bioinformatics)

Pontifical Catholic University of Rio Grande do  
Sul 2013 – 2015

Bachelors Degree In Computer Science  
Pontifical Catholic University of Rio Grande do  
Sul, 1995 – 2002

#### EMPLOYMENT

Data Engineer – Future IQ (2017 – present)

Senior Software Engineer – Dell Computers,  
Brazil (2000 – present)

Software Engineer – Accenture, Brazil (2003 –  
2005)

### WALTER R. PAIXÃO-CÔRTEZ, PH.D.

DATA ENGINEER FUTURE IQ

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

#### RECENT PROJECT EXPERIENCE

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

#### WALTER R. PAIXÃO-CÔRTEZ

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## 1.4.5 Tobiloba Adaramati, Data Analyst

### RESUME



#### EDUCATION

B.Tech. (First Class) Degree in  
Mathematics Education

Federal University of Technology, Minna, 2015

N.C.E Degree in Computer and Mathematics

Federal College of Education (Technical),  
Akoka, 2011

#### EMPLOYMENT

Data Analyst, Future IQ  
USA and Europe, 2017 - Present

Results Measurement Expert, MGF  
Agribusiness, Nigeria, 2018 - Present

CEO, Growth Analytics Consulting  
Nigeria, 2017 - Present

Monitoring and Evaluation Analyst,  
Solina Group, Nigeria, 2016 - 2017

Research Analyst, Solina Group  
Nigeria, 2015 - 2016

### TOBILOBA ADARAMATI, B.TECH (EDU)

#### DATA ANALYST

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

#### RECENT PROJECT EXPERIENCE

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

#### RELEVANT PUBLICATIONS

- Wayzata Benchmark Analysis Report, 2017

#### TOBILOBA ADARAMATI

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## 2.0 Detailed Project Work Plan

The proposed scope of work project plan is implemented in phases that build momentum around an aligned vision and strategy for University City’s future economic development. The production of deliverables is divided into five phases outlined below. The plan is intended to be comprehensive and implementable. It will identify future opportunities and align resources for economic development throughout the City. 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.

### Proposed Project Work Plan



## 2.1 Phase 1: Initial Planning, Research and Benchmarking

This project will begin with meetings between Future iQ team members and University City staff to establish a final work program and schedule specifying the number and type of planned meetings, engagement activities and deliverables to occur throughout the project. Significant background research including exploration of existing planning efforts and economic development programming will be undertaken to understand those strategic directions already established and to identify progress made towards meeting those objectives. This research will include both a review of the external economic development ecosystem and an internal City assessment that will seek to gain a thorough understanding of University City's economic development stakeholders and partnerships, existing data, data infrastructure and resources, as well as the City's programs, policies, practices, procedures, staffing and overall operations.



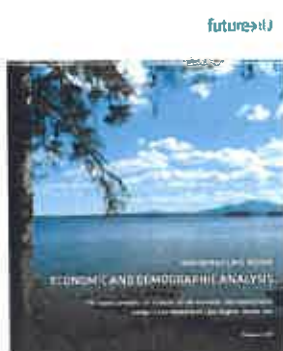
As requested in the RFP, this phase will also include the development of a benchmark study that will explore the economic development activities and programs undertaken by University City to similar programs that exist in similarly sized urban cities facing like challenges. Future iQ will bring its extensive background knowledge of neighborhood node development, workforce issues and industry cluster development to inform this analysis.

Future iQ will assist University City in communications about the economic development strategic plan, both through traditional and digital media. It is our firm belief that consistent and easily accessible project communications add to the transparency of the process and encourage participation. Future iQ team members will work throughout the duration of the project to update and keep current the project information distributed to stakeholders.

### Deliverables from Phase 1 will include:

- Initial planning, meetings and schedule
- Background research and review of existing plans
- Review of economic development ecosystem
- Internal City assessment
- Benchmark Study

### Sample Benchmark Studies



## 2.2 Phase 2: Future Scenarios

Future iQ specializes in studying and understanding larger emergent trends and influences that are re-shaping communities, industries, organizations and regions. This future-oriented lens guides Phase Two as it creates the building blocks of an economic development strategy for University City's future using a scenario-based strategic planning methodology. Using trend research, industry analysis, and expectations about City economic drivers, this methodology will enable stakeholders to explore the impacts and consequences of a range of different future paths as they participate in the University City Economic Development Future Think-Tank. For this project, the scenario planning approach will help stakeholders understand the potential and implications of various economic development directions and explore the synergies in adjacent sectors. This will provide vertical market insights and well as broader industry cluster development and will also allow for an understanding of how different futures could impact different locations within the City.



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

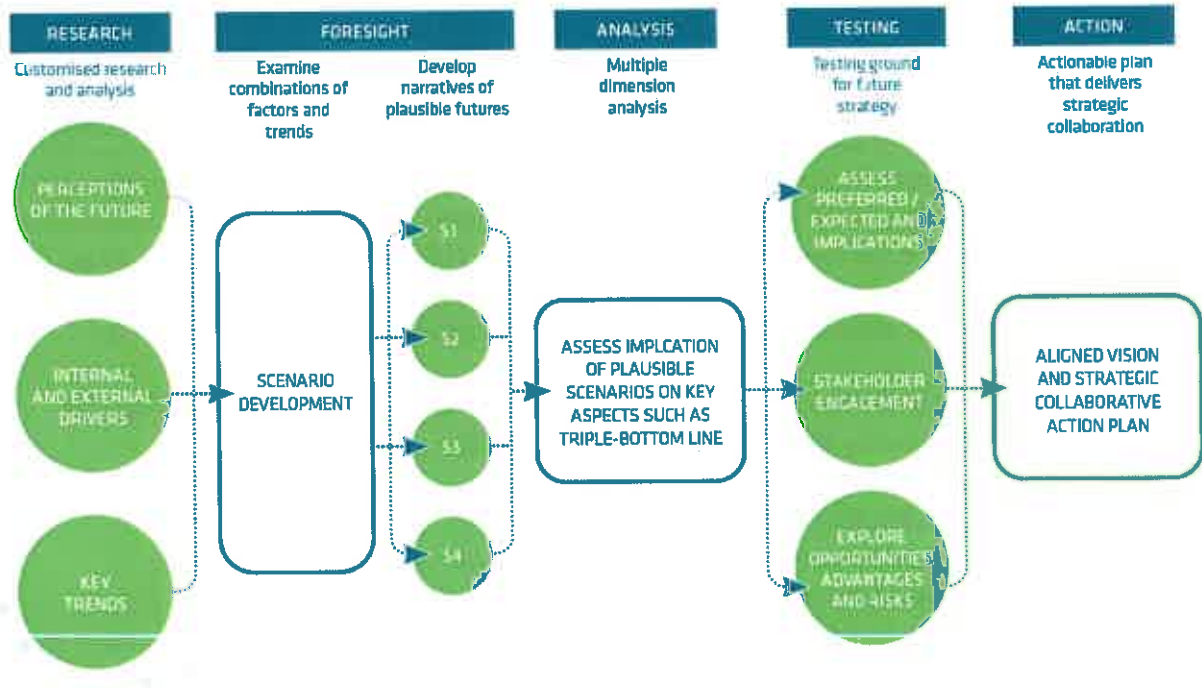
- It is customizable and built around the project plan.
- It is data and evidence-based, ensuring a robust outcome, and a vision and plan that deals with reality, rather than a 'wish-list.'
- Stakeholder engagement is front and center in the design, and stakeholders have the option to have input via multiple methods.
- The process is inclusive and easily scalable and can draw input from all segments of University City's economic development ecosystem.

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

- **Strong collaborative people-focused approach.** The long-term success of this project will be dependent on building strong collaboration among University City's various stakeholders. The development of this type of 'eco-system' needs to be built in upfront in the planning stages of the project with a conscious effort to build on points of consensus to create a common vision for the City.
- **Future oriented.** Building a city-wide shared vision for the future will be critical for University City. In order to develop an agreed-upon economic development strategic plan, stakeholders will need clarity and a common understanding of the drivers impacting the City.
- **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 stakeholders as possible.

- **Project management and communication strategy.** Building the systems and communication methods to ensure compliance and timely delivery are important features of Future IQ's project management.

Below is the visual outline of how Future IQ's scenario-based strategic planning process works:



**Deliverables from Phase 2 include:**

- Pre-Think-Tank surveys
- University City Economic Development Future Think-Tank
- Scenarios of the Future Report



## How Think-Tank Works

The Think-Tank process helps to define a broad vision, goals and directions. It is conducted as a highly participatory workshop over the course of one day or two evenings and produces a preferred future scenario validated by the completion of individual participant 'Heat Maps'. The Heat Map results will be compiled in University City's Economic Development Strategic Plan, revealing consensus on a preferred future or vision for the City. For this project, the scenario based Future Think-Tank is a tool to gain better understanding of stakeholder priorities and goals to create effective action plans for City resource allocation. This process helps stakeholders explore and understand emergent trends, and their potential implications across University City. A range of plausible future scenarios are developed, that act as a testing ground to assess resilience and consequences.



For University City, we believe this process is trying to answer important questions such as:

- What should the University City become?
- How will stakeholder preferences fit into this vision?
- How does University City ensure that economic development planning for the future will incorporate the priorities and alignment for all city stakeholders served?
- How should funds be invested and leveraged?

In addition, we believe that we can use the opportunity of the Think-Tank to further examine circumstances including:

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

The methodology being proposed is more in-depth than a SWOT analysis and will allow University City stakeholders 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 roadmap for the Economic Development Strategic Plan.

### 2.3 Phase 3: Stakeholder Engagement and Targeted Sector Analysis

Engagement is a cornerstone of Future iQ’s strategic planning methodology. Key to effective stakeholder engagement is building momentum and excitement around the economic development strategic plan as it is created. Future iQ uses a wide variety of engagement methods to build this momentum – from large kick-off events, to targeted workshops, focus groups, interviews and surveys that reach all corners of the community. Future iQ goes deep and wide to gather input, and strives to reach those who don’t usually participate in the public process.



Following the Think-Tank, Future iQ will seek to engage stakeholders on a citywide basis. For this project, it will be especially important to obtain input from the key actors in relevant agencies; State and local economic development, and industry leaders. We will conduct interviews and host targeted focus groups to gather input in specific economic development areas such as neighborhood nodes and small area plans. Future iQ’s specific work in “Nodes and Modes” is highlighted in a recent project in Edina, MN, an inner-ring suburb of Minneapolis. These two workshop/focus group sessions explored how to bring reality to the City’s community vision by bridging the strategic pillar of “Nodes and Modes” to its upcoming Comprehensive planning phase through the use of Small Area planning.

Interrelationships between targeted and other prominent industry sectors will also be identified and used to define potential industry clusters. The industry sector analysis will allow the stakeholders to identify those industries that present local strengths as well as those targeted opportunities for further cluster development. At this point, Future iQ will work with the City to confirm and align the sectors to determine which sectors are in stages of growth, are foundational, or in decline. This analysis will be compiled into a Market and Industry Cluster Analysis Report.



## Data Visualization is Key to Understanding City Stakeholders

Data collection from a variety of surveys provides an inclusive process and a comprehensive understanding of stakeholder views and where points of consensus lie. Using Future iQ's online Lab Portal, University City stakeholder survey results will be collected and presented in an innovative data visualization platform. Future iQ's data visualization capabilities 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 city.



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

### Deliverables for Phase 3 include:

- Stakeholder interviews and focus groups
- Surveys, data collection and analysis
- Data visualization platform
- Market and Industry Cluster Analysis Report
- Neighborhood Economic Nodes Analysis



## 2.4 Phase 4: Plan Framework Development

Following the engagement phase, Future iQ will reconvene the original Think-Tank participants. The group will revisit the first Think-Tank and incorporate the results from the expanded engagement to establish initiative priorities and target strategic action areas for the economic development plan. This workshop serves to foster cohesion and alignment by giving participants the opportunity to validate strategic direction and findings for the City's economic development strategy. With this group, Future iQ will guide discussions to incorporate the City's goal to build strategies that address the ten specific questions outlined in the RFP:



1. How can the City most strategically enhance the built environment so as to expand economic development?
2. Identify ways that University City can revitalize areas in the Delmar Loop, Olive Blvd, Delmar/I-70 and area of Cunningham Industrial Park.
3. Describe ways that University City can foster innovation as a key element of its economic development program and work with other innovation centers in the region to capitalize on growth coming out of those centers.
4. Identify ways to enhance career-readiness partnerships with the University City School District.
5. What steps should be implemented in order to diversity economic development while maintaining the City's economic base?
6. How can the City enhance – through economic development – quality of life across the whole community?
7. Identify potential partnerships in development with Washington University.
8. Identify the feasibility of expanded industrial potential on the east end of the Olive Corridor.
9. Identify ways the City could use Smart City Technologies and fiber connectivity as an economic development tool.
10. Identify ways to enhance economic development through the arts.

Additional focus groups will be held to gather input on the recommended initiatives and priorities, to build out the strategic action steps of the strategic pillars and to help build support for the Plan and its framework. This support will be very important to facilitate resource and countywide alignment. Future iQ will draw together all information to craft the new University City economic development strategic plan framework. This will involve careful synthesis of all research, engagement results, reports and analysis into a first draft of the economic development strategic plan. The draft will include:

- Initiatives and a prioritization matrix with an opportunities and risk analysis
- Recommendations and best practice examples
- Policy and / or procedural change recommendations



- Economic development roadmap with implementation toolkits
- Evaluation framework / matrix

Plan specifications will include at least those outlined in the RFP. Particular attention will be paid to the identified target areas, creative economy, strategies to reduce economic inequality, urban economy challenges, workforce housing, entrepreneurship, tourism and hospitality. The roadmap will recommend a course of action along a timeline to implement the Plan, as well as an evaluation framework to measure how effectively the City is achieving its broad goals and impact on the community set out by the plan over time. The plan will be created with the understanding that it must be adaptable to current conditions over time including considerations for the next planning process.

### Measuring Effectiveness

Understanding and measuring progress will be an important part of implementing University City's Economic Development Strategic Plan. Used correctly, metrics provide a powerful feedback loop to understanding the effectiveness of resource development strategies and investment in programs and in identifying emerging gaps. In developing metrics, it is important to include implementation checkpoints using a comparison over time. By comparing progress of the action areas at different points in time, the metrics will give an indication of the trajectory of that item. Phase Five of this project plan includes the development of an evaluation matrix for inclusion as measurements of the effectiveness of University City's Economic Development Strategic Plan.

#### Deliverables for Phase 4 include:

- Think Tank Reconvene
- Focus Groups
- Initiatives and prioritization matrix with opportunities and risk analysis
- Recommendations and best practices
- Policy and/or procedural change recommendations
- Roadmap and implementation toolkits
- Evaluation framework / matrix



## Economic Development Strategic Planning

Future IQ’s in-depth stakeholder engagement builds alignment around a common vision and provides a robust foundation of support within the City. From this support and cohesion, the framework of the economic development strategic plan is built. The plan itself will incorporate the proposed data analyses and vision framework and provide recommended strategies and rationale for policy development, long-term investments, and resource allocation.

University City’s Economic Development Strategic Plan will include the following elements, with the option to include additional content as discovered through the planning process:

- Executive Summary
- Vision Statement
- Scenarios of the Future
- Neighborhood economic nodes analysis
- Initiatives and Priorities with Opportunities and Risk Analysis
- Best practices recommendations
- Policy/procedural recommendations
- Roadmap and implementation toolkits
- Timeline
- Evaluation Framework / Matrix



A vision frames the community’s goals and priorities. It provides a check on strategic actions by providing the opportunity to assess whether the city’s goals are being met in ways that align with the vision and planning priorities.



## 2.5 Phase 5: University City Economic Development Strategic Plan

Future iQ's final steps in the economic development strategic planning process incorporate all input on the draft framework from University City staff and other entities. Future iQ will also use this opportunity to work with the City and others to make sure the implementation toolkits plan for fiscal sustainability by developing realistic, achievable targets. The final University City Economic Development Strategic Plan will be presented by the Project Director to the City at a meeting designated in the initial project planning discussions.

### Deliverables for Phase 5 include:

- Finalize University City Economic Development Strategic Plan
- Presentation of University City Economic Development Strategic Plan

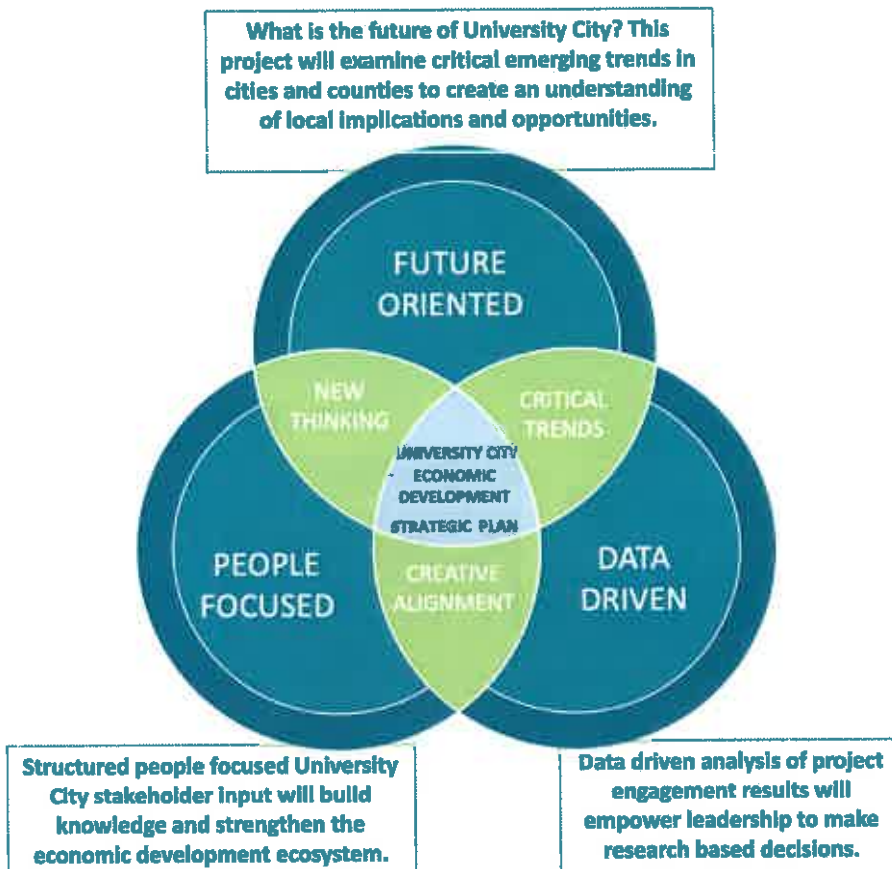


## 2.6 Project Work Plan - Methodological Approach

Future iQ brings a global perspective to visioning, economic development and strategic planning that is invaluable to local interests. For University City, this means access to a wealth of knowledge and experience in the development of economic 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 University City Economic Development Strategic Plan. These strategies will balance priorities across the important dimensions specific to University City and incorporate global and local best practices.

Future iQ's strategic planning methodology is based on three primary principles. It is Future Oriented, Data Driven and People Focused. The 'future orientation' is particularly important to take account of rapidly emerging technological trends. The 'data driven' ensures the plan is built on solid research and information. The 'people focused' is important to build support for the plan within University City and the regional eco-system, and to harness the best possible input into the plan formulation.

### Future iQ's Methodological Framework



## 2.6.1 Future Oriented Research

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



explores trends that have potential for widespread adoption over the next two decades



explores emerging trends impacting outdoor and recreation-based tourism industries.



Analyzes and provides insights on the key trends that are impacting the global manufacturing sector.



### The Next Industrial Revolution (2018)

Explores the broad implications and impacts of an emerging world of



### Future of Midwest Agriculture (2017)

explores future trends and plausible scenarios for Midwest agricultural industries, economies and communities. Key trends include technological disruption, convergence of global forces and



### Global Consultations – Windsor Castle (2012 and 2018)

In partnership with St. George's House, Windsor Castle, Future iQ explored the challenges of building sustainable communities (2012) and explored the future of



### The Future of Food (2016)

examines a range of critical catalysts of change relating to the global food supply chain,

## 2.6.2 People Focused Engagement

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



### **Think-Tank – Scenario Planning**

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



### **Community and Stakeholder Outreach**

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



### **Large Scale Stakeholder Sessions**

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



### **Focus Groups and Planning Workshops**

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



### **Simulation Learning *Future Game*®**

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

### 2.5.3 Data Driven Methodology

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



#### Stakeholder Surveys

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



#### Best Practices Benchmarking

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



#### Data Visualization

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



#### Lab Portal

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



#### Data Insights

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



#### Future Insight

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

### 3.0 Work Schedule

The following chart outlines key phases and suggested periods of activities for this project. This timeline reflects the relative emphasis of activity. Work on some key deliverables will occur in parallel to allow the phases to be completed within the project timeline.

Key Phases	Key Deliverables	J	A	S	O	N	D
<b>Phase 1:</b> Initial Planning, Research and Benchmarking	Initial planning, meetings and schedule	█					
	Background research and review of existing plans	█	█				
	Review of economic development ecosystem	█	█				
	Internal City assessment	█	█				
	Benchmark Study and Analysis Report	█	█	█			
<b>Phase 2:</b> Future Scenarios	Pre-Think-Tank surveys		█	█			
	University City Economic Development Future Think-Tank			█			
	Scenarios of the Future Report			█			
<b>Phase 3:</b> Stakeholder Engagement and Economic Sector Analysis	Stakeholder interviews and focus groups			█	█		
	Surveys, data collection and analysis			█	█		
	Data visualization platform			█	█		
	Market and Industry Cluster Analysis Report			█	█		
	Neighborhood Economic Nodes Analysis			█	█		
<b>Phase 4:</b> Plan Framework Development	Think Tank Reconvene				█		
	Focus groups				█	█	
	Initiatives and prioritization matrix with opportunities and risk analysis				█	█	
	Recommendations and best practices				█	█	
	Policy and/or procedural change recommendations				█	█	
	Roadmap and implementation toolkits				█	█	
	Evaluation framework / matrix				█	█	
<b>Phase 5:</b> University City Economic Development Strategic Plan	Draft and finalize University City Economic Development Strategic Plan					█	█
	Presentation and promotion of University City Economic Development Strategic Plan					█	█



## 4.0 Fee Information

Future iQ operates on a fixed-price delivery. The fees below include all travel, accommodation costs and overheads for the Project Director and staff. Future iQ assumes that University City will provide venues for workshop sessions and presentations, as required.

Key Phases	Key Components	Proposed Fees
<b>Phase 1:</b> Initial Planning, Research and Benchmarking	• Initial planning, meetings and schedule	\$1,500
	• Background research and review of existing plans	\$2,000
	• Review of economic development ecosystem	\$2,500
	• Internal City assessment	\$1,000
	• Benchmark Study and Analysis Report	\$5,000
<b>Phase 2:</b> Future Scenarios	• Pre-think tank surveys	\$1,500
	• University City Economic Development Future Think-Tank	\$12,000
	• Scenarios of the Future Report	\$5,000
<b>Phase 3:</b> Stakeholder Engagement Economic Sector Analysis	• Stakeholder interviews and focus groups	\$8,000
	• Surveys, data collection and analysis	\$3,000
	• Data visualization platform	\$3,500
	• Market and Industry Cluster Analysis and Report	\$5,000
	• Neighborhood Economic Nodes Analysis	\$3,000
<b>Phase 4:</b> Plan Framework Development	• Think Tank Reconvene to develop strategic action areas and priorities	\$6,000
	• Focus groups	\$8,000
	• Initiatives and prioritization matrix with opportunities and risk analysis	\$3,000
	• Recommendations and best practices	\$3,000
	• Policy and/or procedural change recommendations	\$3,000
	• Roadmap and implementation toolkits	\$5,000
	• Evaluation framework / matrix	\$3,000
<b>Phase 5:</b> University City Economic Development Strategic Plan	• Draft and Finalize University City Economic Development Strategic Plan	\$14,000
	• Presentation of University City Economic Development Strategic Plan	\$2,000
<b>Total</b>	<b>FIXED PRICE PROPOSAL</b>	<b>\$100,000</b>

### Proposed payment schedule:

- 20% on signing of contract
- 20% at completion of phases 2, 3, 4 and 5

Please note that Future iQ's fees and project plan are flexible and easily scalable depending on the needs of University City.

## 5.0 References

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

<p><b>Middle Georgia Economic Alliance Strategic Roadmap and Regional Action Plan (2018)</b></p>	<p>Angie Gheesling Executive Director Development Authority of Houston County Office: 478-923-5470 Cell: 478-550-2650 Email: <a href="mailto:gheesling@houstoncountyga.net">gheesling@houstoncountyga.net</a></p>
<p><b>Allen County, Ohio – Collaborative Growth Plan (2015-2017)</b></p>	<p>Jeff Sprague, President/CEO Allen Economic Development Group 144 S. Main Street, Ste. 200 Lima, OH 45801 Tel: 419-222-7706 Email: <a href="mailto:Spraguej@aedg.org">Spraguej@aedg.org</a></p>
<p><b>Edina Chamber of Commerce Economic Development Strategy, Minnesota (2016-2017); ECC Medical/Well-Being Destination Strategic Marketing Plan (2018-present)</b></p>	<p>Lori Syverson, President Edina Chamber of Commerce 3300 Edinborough Way, Ste. 150 Edina, MN 55435 Tel: 952-806-9063 Email: <a href="mailto:lori@edina.org">lori@edina.org</a></p>
<p><b>Coppell Vision 2040 and Strategic Plan, Texas (2018-2019)</b></p>	<p>Traci E. Leach Deputy City Manager 225 E. Parkway Blvd. City of Coppell, TX Tel: 972-304-3672 Email: <a href="mailto:TLeach@coppelltx.gov">TLeach@coppelltx.gov</a></p>
<p><b>Nodes and Modes, City of Edina, Minnesota (2017)</b></p>	<p>Mike Fischer, Edina Council Member City of Edina 4801 W. 50<sup>th</sup> Street Edina, MN 55424 Tel: 612-752-6920 Email: <a href="mailto:mike.fischer@lhbcorp.com">mike.fischer@lhbcorp.com</a></p>
<p><b>Tillamook Strategic Vision and Action Plan for Tourism-Related Facility Investments Services, Oregon (2019-present)</b></p>	<p>Rachel Hagerty, Chief of Staff Tillamook County Commissioners 201 Laurel Avenue Tillamook, OR 97141 Office: 503-842-3404 Cell: 503-812-3465 Email: <a href="mailto:rhagerty@co.tillamook.or.us">rhagerty@co.tillamook.or.us</a></p>

## 6.0 Appendix A: Detailed Project Descriptions

Following are the detailed project descriptions from Related Firm Experience in Section 1.2.

- **Tillamook County, OR, Tourism Investments Strategic Vision and Action Plan (2018-present).** Future iQ has been contracted to lead the county in the development of a strategic vision for how to manage tourism from a facilities perspective. The goal is to develop evaluation criteria that will inform tourism-related facility investments and guide grant program investments with the purpose of applying resources to identified priority projects that support the overall Strategic Vision. The project will involve a situational analysis, Think-Tank, stakeholder engagement and data analysis resulting in a Strategic Vision and Action Plan. <https://future-iq.com/project/tourism-investment-strategic-action-plan-project-oregon-usa/>
- **National Association of Development Associations, Washington, D.C. (2018).** Future iQ has been engaged to provide strategic visioning and planning guidance that will serve to strengthen and build existing nationwide capacity of the organization as well as provide a roadmap to new opportunities for growth in the future. The new Strategic Plan will aim to drive organization-wide consensus on collaborative strategic initiatives that will guide decision-making for NADO and the NADO Research Foundation for the next five years. <https://future-iq.com/project/national-association-development-organizations-nado-nado-research-foundation/>
- **Maine Woods Regional Tourism and Economic Development, ME (2017-2018).** Future iQ worked with a consortium of organizations to explore the tourism and economic development potential in the Maine Woods area. This project covers most of Maine, and includes 7 regional areas, primarily to the west of the coastline. The work included exploration of the potential economic impacts of tourism, and research on important emergent trends shaping outdoor and recreation tourism sectors. <http://future-iq.com/project/maine-woods-usa-2018/>
- **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/>
- **Edina Chamber of Commerce Medical/Wellness Destination Strategic Marketing Plan, Edina, MN (2018-present).** Future iQ has been engaged to support the Edina Chamber of Commerce's strategic plan development by creating a roadmap to develop an innovative, vibrant, regional medical/wellbeing destination in Edina. The project will involve significant research on centers of excellence, innovation hub potential, and educational opportunities for the community. The resulting roadmap will produce recommendations for implementation of the destination strategic marketing plan. <https://future-iq.com/project/medical-well-destination-strategic-marketing-plan-edina-minnesota-2018/>

- **Clearwater Economic Development Association, ID, Visioning and Economic Development Leadership Training (2019).** Future iQ was contracted to provide economic development training services through a program funded by the USDA Rural Community Development Initiative. The project is called *Leading with Intention: North Central Idaho Economic Development Training and Community Planning Assistance*. The intent of the project is to increase recipient capacity for preserving community assets and to increase community wealth through a set of sound economic development principles and effective comprehensive planning and development. <http://future-iq.com/project/clearwater-economic-development-association-usa-2019/>
- **Moosehead Lake Regional Master Plan, Maine (2016-2017).** Future iQ was engaged to create a comprehensive regional master plan for the Moosehead Lake region of Maine. The project involves asset mapping of the region’s physical, financial and political capital to inform recommendations for regional land use and infrastructural improvements. This project focused on workforce development, economic diversification, recreational tourism development, guiding visitor flow patterns and building a year-round tourism economy. <http://future-iq.com/project/moosehead-lake-region-maine-usa-2016-17/>
- **Global Foresight Consultations at Windsor Castle, U.K. (2012 and December 2018).** In 2012, Future iQ hosted a global Think-Tank forum at Windsor Castle on ‘Building Sustainable Regional Communities.’ The event explored a series of key questions critical to building the future of regional economies and communities. Future iQ hosted an additional global Think-Tank at Windsor Castle in December 2018 to explore ‘The Future of Urban Living’. Global experts from gathered at the 2018 Think-Tank to discuss and debate future trend and impacts on urban living worldwide. <http://future-iq.com/project/global-think-tank-windsor-castle/>
- **City of Mitchell, SD, Community Vision and Strategic Action Plan (2019-present).** Future iQ was recently engaged by the City of Mitchell to develop a community vision and strategic action plan for the City. The project will involve a public project launch, Benchmark Report, Think-Tank, extensive community and stakeholder engagement, data collection, analysis and visualization, as well as a strategic action plan with a roadmap and key measures for success. <https://future-iq.com/project/city-of-mitchell-south-dakota-usa-2019/>
- **City of Smithville, MO, Community Vision and Strategic Action Plan (2019-present).** Future iQ was recently engaged by the City of Smithville to guide the visioning and strategic planning process for the City. The process will involve a benchmark report and communications plan, a Think-Tank and Scenarios of the Future Report, extensive community stakeholder engagement, data visualization, and the production of a strategic action plan. <https://future-iq.com/project/city-of-smithville-missouri-usa-2019/>
- **Park City, UT, Community Vision 2020 (2019-present).** Future iQ was recently engaged by Park City to develop a community vision and action plan for the City. The project will involve a Think-Tank, extensive community and stakeholder engagement, data collection, analysis and visualization, as well as an action plan with a statement of community ideals and core values. <https://future-iq.com/project/park-city-vision-2030-utah-usa-2019/>
- **B.E.S.T. of Waseca County, MN, Community Vision and Strategic Action Plan (2017-2018).** In collaboration with the firm of LHB, Future iQ was engaged by the Waseca Business and

- Entrepreneurial Support Team (B.E.S.T.) to facilitate the development of a common vision, strategic plan and action plan for Waseca County, City and area organizations. The project involved a Benchmark Analysis, communications plan, extensive community engagement and data collection and visualization. The resulting vision, strategic action plan provided cohesion to community action as well as a unified voice for where the community needs to invest its resources. <http://future-iq.com/project/waseca-county-minnesota-usa-2017/>
- **City of Coppell, TX, Community Vision and Strategic Plan (2018-present).** The City of Coppell engaged Future iQ to develop the Coppell 20Next Plan involving both visioning and a new strategic plan for the City. The project lasted approximately 12 months, and involved a Benchmark Analysis, Think-Tank, extensive community and stakeholder engagement, data collection, analysis and visualization, as well as a strategic plan with a roadmap and key measures for success. <https://future-iq.com/project/coppell-vision-2040-usa-2018/>
  - **City of Trotwood, OH, Organizational Strategic Plan (2019-present).** The City of Trotwood engaged Future iQ to develop the next 5-year organizational strategic plan for the community of Trotwood. The project will include background research, facilitation of a Think-Tank, extensive community engagement, community surveys, Scenarios of the Future Report, focus groups, and a roadmap with implementation toolkits. <https://future-iq.com/project/city-of-trotwood-ohio-usa-2019/>
  - **Town of Hilton Head Island, SC, Community Vision and Strategic Action Plan (2016-2018).** Future iQ was engaged to create a long-term comprehensive community vision and strategic action plan that will guide the community of Hilton Head Island for the next 10-20 years. 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 involved extensive community engagement, stakeholder interviews, community surveys, data visualization and analysis, the development of a communications plan and Brand, as well as a strategic roadmap for the vision once created. <http://future-iq.com/project/hilton-head-island-south-carolina-usa-2016-17/>
  - **Future of Midwest Agriculture, University of Minnesota, MN (2016-present).** Future iQ is working on a collaborative research project with the University of Minnesota to explore the 'Future of Midwest Agriculture', including the sustainable intensification of Midwest agriculture through the use of scenario planning. Anticipated outcomes include a more in-depth understanding of plausible futures for U.S. Midwest agriculture and how the role of these narratives promote cooperation and innovation in the industry, as well as the development of a broad vision and strategic plan for a new agricultural bio-economy in the Midwest. <http://future-iq.com/project/u-s-midwest-agriculture-scenarios-future-2016-17/>
  - **Snohomish County, WA, Sustainable Tourism Development and Visioning (2017-2018).** Future iQ was contracted to conduct the first and second phases of this project. Building off the 2018-2022 Snohomish Strategic Tourism Plan, Future iQ performed background research, including online regional industry participant surveys to gauge perceptions about the future of tourism in each region, areas of opportunity and threat, changes occurring and the appetite for change and sensitivity to a range of future shaping trends. The project involved extensive community engagement, benchmarking, four regional Think-Tanks, production of sustainable tourism visions and reports for each regional area, as well as a combined report that supports the County's sustainable destination development program.

<http://future-iq.com/project/snohomish-county-regional-destination-development-washington-usa/>

- **Travel Oregon, Oregon (2009-present).** Travel Oregon embarked on a regional tourism planning process and has contracted with Future iQ to assist with the development of a regional tourism planning framework, connecting regional plans together and linking them to the overall Travel Oregon strategic plan. This included stakeholder planning and visioning sessions in all 7 major regions across Oregon. The results of this project produced a strategic vision and action plan for each region in relation to the overall planning framework. <http://future-iq.com/project/oregon-regional-tourism-planning-usa/>
- **Province of Alberta, Small Business Strategy, Canada (2009-2014).** Future iQ worked with the Government of Alberta on a range of transformational 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/>
- **City of Edina, MN, Community Visioning and Comp Plan Bridging (2014-2015).** Future iQ was contracted by the City of Edina to design and facilitate the Vision Edina initiative to develop a scenario-based strategic vision framework for the city's future. From a strategic planning perspective, Vision Edina examined the challenges and opportunities that were identified as having the highest priority within the community. These included the community's stated desired features to be inclusive and connected; to maintain a "build-to-scale" development perspective; to pursue sustainable environment policies; to remain and build its status as being a community of learning; and to be future-oriented in its planning initiatives. These strategic focus areas represent key priorities and drivers that were determined during the scenario planning process and highlighted within Edina's two overarching areas of concern: "Balancing Edina's Redevelopment" and "Enhancing Community Fabric and Character". <http://future-iq.com/projects/vision-edina/>
- **City of Wayzata, MN, Wayzata 2040 Community Vision (2017-2018).** Future iQ was contracted by the City of Wayzata to develop a new Community Vision 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/>
- **McHenry County College, IL, Strategic Visioning and Foresight (2018).** Future iQ was contracted to examine the county ecosystem to help inform the College as it prepared for an internal strategic planning effort. Future iQ provided strategic visioning and planning guidance that positioned the College as a 'thought-leader' in the community and produced a strategic foresight document that would examine future evolution in the County. <https://future-iq.com/project/mchenry-county-college-crystal-lake-illinois-2018/>
- **Community Action Partnership of Hennepin County, MN (2017).** Future iQ was contracted to lead the development of a comprehensive organizational Strategic Plan to establish

services, programs and partnerships to address poverty and increase family and economic stability within Hennepin County communities. The project involved scenario planning and stakeholder engagement, research analysis and the production of an Implementation Action Plan as part of the final Strategic Plan. <http://future-iq.com/project/community-action-partnership-hennepin-county-minnesota-usa-2017/>

- **North Tyrrhenian Sea 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 (Italian Riviera, Tuscany Coast, Sardinia, Corsica) producing individual planning 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/>
- **Mobilize Maine: Asset-Based Regional Economic Development (2010-2014).** Mobilize Maine is a statewide asset based economic development initiative built upon the seven federally recognized economic development districts (EDD). VITAL Economy, led by Future iQ team member Jim Haguewood, guided the regional leaders through economic benchmarking, goal setting and asset mapping in preparation for the selection of targeted industry clusters. The analysis concluded a focus on renewable energy and IT operations centers. [www.nado.org/mobilize-maine-asset-based-regional-economic-development/](http://www.nado.org/mobilize-maine-asset-based-regional-economic-development/)

