

CITY OF UNIVERSITY CITY
MISSOURI
COMPREHENSIVE MASTER PLAN UPDATE
OCTOBER 10, 2019

UNIVERSITY CITY
2040 COMPREHENSIVE
PLAN



Submitted by:
Future iQ, Inc.
P.O. Box 24687
Minneapolis, MN 55424
www.future-iq.com

David Beurle
david@future-iq.com
612-757-9190

Heather Branigin
heather@future-iq.com
612-757-9121



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

October 10, 2019

City of University City
Attn: Mrs. LaRette, City Clerk
6801 Delmar Boulevard
University City, MO 63130

RE: RFP for a Comprehensive Master Plan Update

Dear Mrs. LaRette,

Future iQ is pleased to submit this proposal to serve as the consultant team in partnership with Jon Stover & Associates (JS&A) to develop a new 2040 Comprehensive Plan for the City of University City.

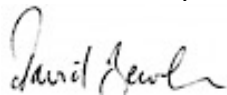
Future iQ has a strong track record of designing and implementing large-scale strategic planning projects across North America, Europe and Australia. With over 50 major planning projects completed, some of the strengths we believe we bring to this project include:

- **We understand the 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, a first-ring suburb of Minneapolis in Minnesota involved extensive public engagement with businesses, neighborhood and housing associations, community organizations and individual homeowners as they dealt with issues such as teardowns and rebuilds, re-purposing commercial properties, and higher density zoning issues. Balancing the need for redevelopment as well as the need to maintain the essential character and charm of a community was crucial in the planning process. We will bring this sensitivity to University City's planning process.
- **We specialize in strategic planning, visioning and stakeholder engagement.** Engagement is one of the cornerstones of Future iQ and JS&A'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 have 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 community development.
- **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 and JS&A specialize 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 and JS&A deliver 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 a new 2040 Comprehensive Plan that can be supported by community 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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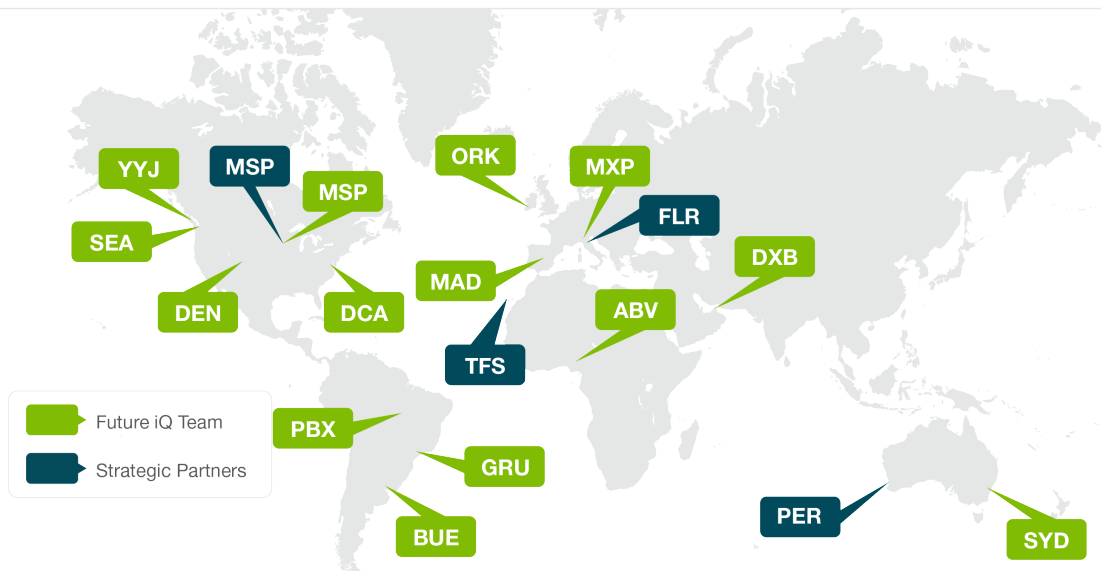
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1.0 Project Overview

1.1 General Information

1.1.1 Firm Background – About Future iQ

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



Future iQ specializes in the following functional and sector areas:

- City, Urban and Regional Planning
- 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>

1.1.2 Firm Background – About Jon Stover & Associates

JON STOVER & ASSOCIATES

Bridging the Gap Between Local Government, Business, Development, and the Community



ECONOMIC DEVELOPMENT CONSULTING

We help make neighborhoods great.

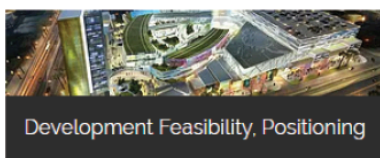
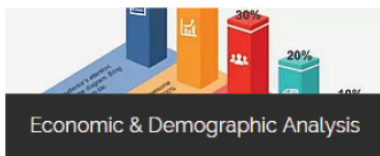
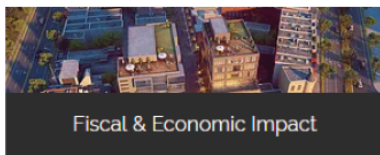
Jon Stover & Associates (JS&A) works with public, private, and nonprofit organizations to bridge the gap between the very different worlds of local policy, business, urban design, community interest, and real estate development. In doing so, we inform, develop, and implement strategies to strengthen a place economically, visually, and socially. Whether you are seeking to shape your parcel, corridor, city, or region, we look forward to working with you.

OUR HISTORY

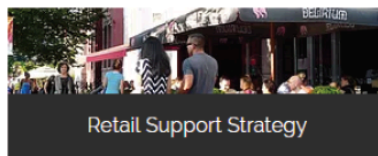
JS&A is a certified business enterprise (CBE) in the District of Columbia that specializes in economic and real estate analysis, neighborhood revitalization strategy, and stakeholder coordination to implement what needs to get done. Founded in 2009, JS&A has completed hundreds of projects around the country for city agencies, real estate developers, community groups, non-profit organizations, and private business owners. Please visit www.jonstoverandassociates.com for more information on our services and our portfolio of work.

OUR SERVICES

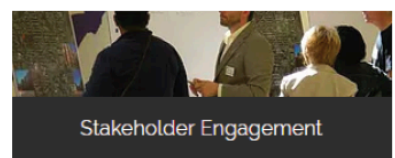
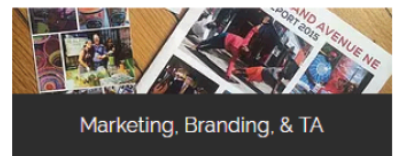
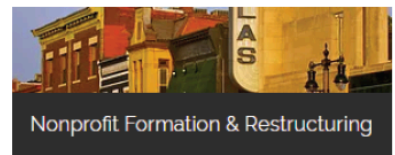
Analysis



Strategy



Implementation



Jon Stover & Associates | (202) 695 - 4956 | www.stoverandassociates.com | 1718 1/2 Florida Ave NW, Washington, DC

1.1.3 Firm Qualifications – Future iQ

1.1.3.1 Relevant Project Experience

A key feature of Future iQ’s work includes planning projects for cities, nonprofit organizations, corporations, and regions. Below are examples of recent visioning, strategic and regional planning experience. Please also visit <http://future-iq.com/featured-projects/>.

Relevant Project Experience

- City of Smithville, MO, Community Vision and Strategic Action Plan (2019-present)
- Mitchell, SD, Community Vision and Strategic Action Plan (2019-present)
- Park City, UT, Community Vision and Action Plan (2019-present)
- City of Coppell, TX, Vision and Strategic Plan (2018-2019)
- Trotwood, OH, Organizational Strategic Plan (2019-present)
- City of Edina, MN, Community Vision and Comprehensive Plan Bridging (2014-2017)
- Town of Hilton Head Island, SC, Vision and Strategic Action Plan (2016-2018)
- City of San Diego, CA, Defense Industry Strategy (2016-present)
- B.E.S.T. of Waseca County, MN, Visioning and Strategic Action Plan (2017-2018)
- City of Wayzata, MN, Community Vision (2017-2018)
- Tillamook County, OR, Strategic Vision and Action Plan (2018-2019)
- National Association of Development Organizations, Washington DC, Nationwide Strategic Plan (2018-present)
- McHenry County College, Crystal Lake, IL, Strategic Visioning and Foresight (2018)
- ECC Medical/Wellness Destination Strategic Marketing Plan, Edina, MN (2018-2019)
- CEDA, ID, Visioning and Economic Development Leadership Training (2018-2019)
- Global Foresight Consultations at Windsor Castle, U.K. (2012 and December 2018)
- Community Action Partnership of Hennepin Co., Minneapolis, MN, Strategic Plan (2017)
- Future of Midwest Agriculture, University of Minnesota (2017 – present)
- Moosehead Lake Region, ME, Strategic Action Plan (2016-17)
- Travel Oregon, Statewide Regional Tourism Planning (2016-18)
- Maine Woods Tourism and Economic Development, ME (2017-2018)
- North Tyrrhenian Sea-Mediterranean Ports Project, Italy/France (2015-16)
- Edina Chamber of Commerce Economic Development Strategy, Edina, MN (2016-2017)
- Province of Alberta, Small Business Strategy, Canada (2009-2014)

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

1.1.3.2 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

Below is a list of seven Future iQ OEA projects.

State of Vermont, 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/>

City of San Diego, CA – Regional Economic Planning (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/>

Middle Georgia Economic Alliance, GA - Regional Action Plan (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/>

**New Hampshire Aerospace and Defense Consortium (NHADEC), NH
Strategic Action Plan (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/>

Allen County, OH - Regional Collaborative Growth Plan, Greater Lima Region (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/>

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/>

Texarkana, TX – 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/>

1.1.4 Firm Qualifications and Experience – Jon Stover and Associates

1.1.4.1 DPW Public Works Master Plan, Washington, DC (2015)

JON STOVER & ASSOCIATES
Project Profile - DPW Public Works Master Plan

JS&A Economic
Development
Consulting



Client: DC Department of Public Works,
Department of General Services,
and Office of Planning

City: Washington, DC

Date: 2015

Role: Subconsultant under Mosaic Urban
Partners and Ayers Saint Gross

Scope: Land Use Analysis
Residential Land Use
Retail Land Use
Office Land Use
Industrial Land Use
Public Facilities Analysis
Real Estate Market Analysis
Workforce Projections
Demographic Projections
Development Trends / Projections
Site Development Analysis
Financing Strategy
Public-Private Partnership

PROJECT SUMMARY

JS&A worked with Mosaic Urban Partners, Ayers Saint Gross, and multiple city agencies, including Office of Planning, Department of Public Works, Department of General Services, to develop a Master Plan for a consolidated campus for the DC Department of Public Works (DPW) in a city-owned site redevelopment effort in the Ivy City neighborhood. JS&A led aspects of the project including conducting a land use and real estate market analysis; site development analysis; financing structure; and public-private partnership structure and policy recommendations.

SCOPE DETAIL

Land Use and Market Analysis. JS&A completed a detailed land use and real estate market analysis of multiple land uses including residential, commercial, and industrial land uses, alongside assessing real estate trends in the Sub Area nearby the proposed campus. Findings were assessed to understand the implications of supply-demand and the proposed development scenario and led to site development recommendations.

Labor, Workforce, and Demographic Projections. JS&A conducted areawide Economic Development Projections including Labor, Workforce, and Demographic Projections. These projections assessed the impact of planned, proposed, and under construction development projects in the surrounding sub area to understand anticipated new supply and population anticipated to be in close proximity to the proposed Public Works Master Plan campus.

Jon Stover & Associates, LLC | info@stoverandassociates.com | 202.695.4956 | www.jonstoverandassociates.com

1.1.4.2 Eastover Sector Plan and Corridor Redevelopment Strategy, Prince George's Co., MD (2016)

JON STOVER & ASSOCIATES

Project Profile - Eastover Sector Plan and Corridor Redevelopment Strategy



Client: Prince George's County Planning Department; Maryland - National Capitol Park and Planning Commission

City: Prince George's County, Maryland

Date: 2016

Role: Subconsultant with Cooper Carry

Scope: Comprehensive Sector Plan
Corridor Analysis
Corridor Regeneration Strategy
Revitalization Strategy
Stakeholder Outreach
Sector Plan
Commercial and Retail Strategy
Land Use Analysis

PROJECT SUMMARY

The Sector Plan, a local Comprehensive Plan, for the Forest Heights / Glass Manor area of Prince George's County was conducted on behalf of the Maryland - National Capitol Park and Planning Commission. The Eastover Sector Plan focused on urban and environmental site design, transportation planning, and economic revitalization strategies. JS&A served as Project Manager for the economic revitalization component of the overall project led by Cooper Carry. The team successfully developed a community-supported vision, recommended the ideal mix of land uses, proposed economic incentives and funding strategies, and leveraged regional development activities. Project deliverables included a comprehensive public involvement process, a neighborhood and corridor regeneration strategy, and illustrative design scenarios.

SCOPE DETAIL

Corridor Strategy. The Corridor Revitalization Strategy leveraged the public realm improvements recommended by the planning, design, and engineering consultants as the catalyst to create additional value – and steer development – along targeted portions of the commercial corridor. In addition, the public realm improvement strategy was developed in conjunction with the revitalization strategy, creating a process where initial targeted public investment encourages additional future private investment. The strategy identified the location, timing, and implementation processes for various retail regeneration and attraction recommendations within four cluster areas.

Stakeholder Engagement. The team created a multi-track Engagement Process. Multiple charrettes were held with County officials to receive continual guidance and feedback on the evolution of the analysis and recommendations. The team also conducted Development Roundtables to direct conversations with landowners and managers of particularly important parcels of land.

Jon Stover & Associates, LLC | info@stoverandassociates.com | 202.695.4956 | www.jonstoverandassociates.com

1.1.4.3 Downtown Lake Worth Arts and Culture Master Plan, Lake Worth, FL (2016-2017)

JON STOVER & ASSOCIATES

Project Profile - Downtown Lake Worth
Arts and Culture Master Plan



Clients: Cultural Council of Palm Beach County; the City of Lake Worth, and the Lake Worth Community Redevelopment Authority

City: Town of Lake Worth, FL

Date: 2016 - 2017

Role: Real estate, market analysis, and implementation consultant on team with Lord Cultural Resources

Scope: Residential Market Analysis
Office Market Analysis
Retail Market Analysis
Cultural Land Use Analysis
Community Engagement
Strategy to Attract and Support Cultural Organizations & Users
Economic Development Strategy
Implementation Plan

Client Contact:
Jan Rodusky, Chief Grants Officer
Cultural Council of Palm Beach Co.
Phone: (561) 471 - 2901
Email: jrodusky@palmbeachculture.com

PROJECT SUMMARY

Jon Stover & Associates was selected as part of a team with Lord Cultural Resources to undertake the Downtown Lake Worth Arts and Culture Master Plan. Led by the Cultural Council of Palm Beach County, the Lake Worth Community Redevelopment Authority (CRA), and the City of Lake Worth, the Master Plan aims to leverage a growing local arts scene as a central part of the greater 'downtown' economic development strategy.

SCOPE DETAIL

Market Analysis. JS&A conducted a market analysis that projected town population growth and demographic shifts and projected future supply, demand, and development opportunity for residential, commercial, and civic land uses. The market analysis provided a framework to inform policy, design, and development recommendations for the commercial 'downtown' portion of Lake Worth

Cultural Enhancement and Economic Development Strategy. Working with the project team, JS&A helped develop four high-priority strategies for supporting and enhancing arts and culture in downtown Lake Worth: (i) establishing an independent nonprofit to provide downtown stakeholder advocacy, support, and coordination; (ii) enhancing Lake Worth's arts- oriented brand; (iii) promoting local arts diversity and increasing exposure; and (iv) encouraging and directing growth in the downtown area.

Implementation Plan. JS&A developed a series of action steps for specific Lake Worth stakeholders to undertake to best capitalize on each key strategic opportunity and achieve the goals and objectives that emerged from this arts and culture master planning process, culminating in an implementation work plan to help guide stakeholders through the implementation process.

1.1.4.4 Middlebury Downtown Master Plan, Middlebury, VT (2019)

JON STOVER & ASSOCIATES

Project Profile - Middlebury Downtown Master Plan



- Client:** Town of Middlebury, Planning & Zoning
- City:** Town of Middlebury, VT
- Date:** 2019
- Role:** Subconsultant on team with Town Planning & Urban Design Collaborative
- Scope:** Demographic Projections
Population Projections
Employment Projections
Land Use Analysis
Real Estate Market Analysis
Housing Supply and Projections
Economic Analysis
Stakeholder Engagement

PROJECT SUMMARY

Jon Stover & Associates is currently serving as a subconsultant for Town Planning & Urban Design Collaborative to help guide the Town of Middlebury in its Downtown Master Plan. This Master Plan aims to understand the current conditions of the town, projections for the future, and a pathway forward leveraging its assets, anticipated changes, and community vision.

SCOPE DETAIL

Projected Changes. JS&A is assessing the projected changes in the demographics and population of Middlebury in the coming years. This assessment includes not population projections, but economic conditions as well, including employment and income.

Land Use Analysis and Market Conditions. Working with the project team, JS&A will help analyze the town's land uses and their relation to real estate market conditions. This analysis will include residential land uses (product, ownership, home values, sales and rent trends, locations, supply and demand, and affordability), commercial land uses (including office and retail occupancy, lease rates and trends, conditions, leakage, and regional context), and hospitality land uses (existing supply and demand). This land use analysis and market conditions will conclude in a SWOT analysis.

Community and Stakeholder Engagement. JS&A is engaging with key stakeholders and community members throughout the project. This engagement will include in-person charrettes, presentations, and focus groups to understand the community's vision, the city's goals and needs, and the opportunities at play to shape the Town of Middlebury and its future.

1.1.4.6 Prince George’s County Project Experience, MD (2013-2017)

JON STOVER & ASSOCIATES
 Prince George’s County Project Experience

JS&A Economic
 Development
 Consulting



Clients: M-NCPPC & Prince George’s County Planning Department

Location: Prince George’s County, MD

Date: 2013 through 2017

Scope: Economic Development Strategy
 Land Use Analysis
 County-wide
 Sub Area
 Regional
 Site Specific
 Real Estate Market Analysis
 Zoning Policy Recommendations
 Subdivision Ordinance Recommendations
 Evaluation of Economic Development Projections/ Trends
 Analysis of Site Specific and County-wide Impact

JS&A has completed a variety of work relating comprehensive planning, economic analysis, and economic development strategies in Prince George’s County, Maryland. On the following two projects, JS&A supported Green Door Advisors and Mosaic Urban Partners, respectively, as a subcontractor.

COUNTY ECONOMIC GENERATORS & TARGETED INVESTMENT STRATEGY

The Economic Generators and Catalysts study identified key high growth industry sectors in Prince George’s County that have the capacity to contribute to economic growth and development in the county. The study assessed regional commercial real estate market activity and analyzed the county’s key economic competitive advantages and challenges toward attracting strategic high-growth industries. As a subcontractor for Green Door Advisors, JS&A developed a methodology that identified and compared over 20 evaluation criteria across 33 geographic submarkets and identified locations that are ideal for County investment and planning support. JS&A’s recommendations were approved and enacted into County policy.

MARKET ANALYSIS & DEVELOPMENT INSIGHT FOR COUNTY-WIDE REZONING INITIATIVE

The Prince George’s County Planning Department undertook a comprehensive rewrite of the County’s Zoning Ordinance and Subdivision Regulations. JS&A provided additional qualitative insights on the strengths, weaknesses, opportunities, and challenges of developing high-quality projects in Prince George’s County. These insights should help County decision makers in their review of the proposed Zoning Rewrite. In addition, Mosaic -- with JS&A as project manager -- developed a review of available economic development incentives and real estate financing tools available in Prince George’s County as well as a series of market analyses to help Prince George’s County decision makers create more effective zoning and development policies. The analyses recommend how specific policies and tools can be altered to better align with real estate market realities, constraints, and trends.

Jon Stover & Associates, LLC | info@stoverandassociates.com | 202.695.4956 | www.jonstoverandassociates.com

1.2 Project Understanding

Future iQ and JS&A believe this project is an opportunity for University City to create a unique comprehensive view of how it sees itself as an inner-ring suburb of St. Louis. Cities are not just about infrastructural improvements and basic services, they are about economic development and creating a sense of place – a destination that attracts not only visitors, but a talented workforce, supports a thriving economy, and provides a quality of life and experience to its community members that promotes health and wellbeing for all. For University City, it is understood that retaining the heritage and character of the city in addition to building connectivity and resilience into its plans will be critical for success. Any long-term vision for the city must be seen through this lens and build on the inclusive and vibrant “University City” sense of place associated with University City.

Our overarching understanding of this project is that University City’s new 2040 Comprehensive Plan should work seamlessly to guide strategic city improvements, conservation and development goals. It will build consensus around an inclusive vision forward for University City that meets the needs and desires of the City and community. It is understood that the ultimate responsibility of the new 2040 Comprehensive Plan will be to provide a policy guiding document that will reflect and respond to the priorities, values and requirements of residents and stakeholders while safeguarding the history, sense of place and desires that University City residents, businesses and visitors experience throughout the community. The new 2040 Comprehensive Plan will guide decision-making and develop a pathway forward to achieve University City’s vision over the next twenty years. The Plan will reflect incremental changes and action-oriented policies that will both allow this vision to foster and ensure accountable implementation.

2.0 Qualifications

2.1 Personal Qualifications

Future iQ is proposing to partner with the firm of Jon Stover and Associates (JS&A) for this project. The combined skillsets will bring significant strategic and small area planning, economic development, downtown planning, urban design and engagement experience to support the outcomes necessary to produce University City’s 2040 Comprehensive Plan. The client-facing project team members presented have significant experience working on visioning and economic development, small area and strategic planning projects. We recognize that this project requires significant periods for intensive workloads and our team availability will allow sufficient team resources to be deployed, both on-site and for data analysis and report preparation. The proposed team members are an experienced and reliable team, with a complementary mix of required skills in:

- Highly developed critical thinking capacity in the areas of visioning and strategic planning, organization design, and collaboration building
- Knowledge and experience with municipalities, corporations, regional entities and non-profit organizations
- Detailed practical experience in downtown planning and design, small area planning, 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, environmental planning, 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 team member roles for this project:

Team Member	Title	Role
David Beurle	CEO, Future iQ	Project Director, Facilitation, Strategy Development
Heather Branigin	VP, Foresight Research, Future iQ	Research, Strategy Development, Engagement, Writing
Johanna Hoffman	Sr. Foresight and Planning Specialist, Future iQ	Urban Design and Environmental Planning, Engagement
Walter Paixao-Cortes	Data Engineer, Future iQ	Data Analysis and Visualization
Tobiloba Adaramati	Data Analyst, Future iQ	Data Analysis
Jon Stover	Managing Director, Jon Stover and Associates	Lead Planner, Economic and Impact Analysis
Leslie Deacon	Project Manager, Jon Stover and Associates	Physical Planning, Economic Analysis, Community Development
Aaron King	Consultant, Jon Stover and Associates	Market Analysis, Development Feasibility

2.1.1 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



DAVID BEURLE, *B.SC. AGR*

C.E.O. FUTURE IQ

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

RECENT PROJECT EXPERIENCE

- New England Regional Defense Industry Collaboration, New England, 2019
- Park City Community Vision and Strategic Action Plan, UT, 2019
- Clearwater Economic Development Association, ID, 2019
- City of Mitchell Community Vision and Action Plan, SD, 2019
- ECC Medical/Well-Being Strategic Marketing Plan and Economic Development Plan, MN, 2016-2019
- Tillamook County Strategic Vision and Action Plan, Oregon, 2018-2019
- National Association of Development Organizations, Washington, D.C., 2018-2019
- Future of Urban Living Think Tank, St Georges House, Windsor Castle, UK, 2018-2019
- Middle Georgia Regional Defense Industry Economic Diversification Project 2017 - 2018
- City of Coppell, Texas, Community Visioning 2018 - 2019
- Snohomish County, Washington, Tourism Implementation Plan 2017 - 2018
- Maine Woods, Tourism Impact Study 2017 - 2018
- City of San Diego Defense Industry Economic Development Plan, California, US, 2016 - 2018
- North Coast, Oregon, Tourism Destination Management, 2018 - 2019
- Hilton Head Island, South Carolina, Community Visioning project, 2016 - 2017
- Task Force LIMA Defense Initiative, Ohio, US, 2015 - 2017
- National Congress of American Indians, Future Game development, 2016 - 2018
- City of Wayzata, Minnesota, US, Community Visioning 2017 - 2018
- Moosehead Lake Regional Master Plan, Maine, US, 2016 - 2017
- Edina Economic Development Plan, Minnesota, US, 2016
- Oregon Regional Tourism Planning US, 2015 - 2016
- Columbia River Gorge, Oregon, US, 2015 - 2016
- Griffith Foods Scenario Planning Chicago, US, 2016
- Mediterranean PORTS EU Projects Italy/France, 2015
- Fox Valley Defense Industry Adjustment, Wisconsin, US, 2014 - 2015
- Texarkana Defense Project, Texas, US, 2015
- Vision Edina, Minneapolis, US, 2014 - 2015
- Australian Grain Research and Development Corporation, Western Australia, 2008 - 2015
- Vadinia Project, Leon, Northern Spain, 2014
- Agriparco Montespertoli, Tuscany, Italy, 2014
- Govt. of Alberta Small Business Strategy, Canada, 2013
- Steering it Forward North East Nevada, US, 2013
- Mount Pierre Project, Australia, 2013
- Kewaunee Economic Adjustment Project, Wisconsin, US, 2013
- Global Think Tank, Windsor Castle, UK, 2012
- Future West Cork, Ireland, 2009 - 2012
- Palliser Futures Project, Alberta, Canada, 2009
- Winnemucca Futures Project Nevada, US, 2009

RECENT PUBLICATIONS

- The Future of Urban Living, 2019
- 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

2.1.2 Heather Branigin, Vice President, Foresight Research, Future iQ

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, MN, 2013-2016

NCCA - National Model United Nations
Minneapolis, MN, 2010-2013

UNA-MN, St. Paul, MN, 2007-2010

PHILANTHROPIC WORK

Bd. Member, Caring for Cats, present

Vol Judge, Future City Comp., 2017

Adv. Council Member, UNA-MN
2014-present

Co-President (2011-2013), Bd. Member
(2010, 2014) UNA-MN



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 Future of Urban Living* and *The Next Industrial Revolution*. 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

- Kinship Fellows and Food:Land:Opportunity Grantees Summit, Chicago, IL, 2019-Present
- City of Trotwood Organizational Strategic Plan, OH, 2019-Present
- New North Business Intelligence Strategic Action Plan, WI (2019)
- New England Collaborative, DoD-OEA (2019)
- City of Mitchell Community Vision and Action Plan, SD, 2019-Present
- Future of Urban Living Global Consultation at Windsor Castle, UK, 2018
- CEDA, ID, 2019
- Sustainable Materials Management - Vision for Iowa, Iowa DNR, 2018-Present
- Tillamook County Strategic Vision and Action Plan, OR, 2018-2019
- ECC Medical/Well-Being Strategic Marketing Plan and Econ Dev Plan, MN, 2016-2019
- NADO, Washington, D.C., 2018-2019
- Coppell Vision 2040, Coppell, TX, 2018-2019
- City of San Diego, OEA 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
- Wayzata Community Vision, MN, 2017-2018
- NHADEC, NH, 2017-2018
- Waseca Vision 2030, MN, 2017-2018
- Edina Nodes and Modes Bridging Sessions, Edina, MN 2017
- Scott County Visioning and Scenario Planning, MN, 2017
- CAP-HC 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

- IDNR Strategic Vision for Iowa, 2019
- Trotwood Think-Tank Report, 2019
- New England Collaborative Think-Tank Report, 2019
- NADO Strategic Action Plan, 2019
- Edina Med/Wellbeing Dest Marketing Strategic Plan, 2019
- CEDA Think-Tank Report, 2019
- Tillamook Co Think-Tank Report 2019
- The Future of Urban Living, 2019
- Coppell Vision 2040 Strategic Action Plan, 2019
- The Future of Tourism, 2018
- McHenry Co Coll Strategic Foresight Session, 2018
- The Next Industrial Revolution, 2018
- Waseca Vision 2030 Strategic Action Plan, 2018
- NHADEC Strategic Action Plan, 2018
- Snohomish Co Tourism Industry Reports, 2018
- Scott County Planning Reports, 2017
- Propel San Diego Think-Tank Report, 2017
- Edina Chamber Econ Dev Strategy, 2017
- Innovation Framework for Greater Lima Region, 2016
- The Future of Food, 2016

HEATHER BRANIGIN

heather@future-iq.com

2.1.3 Walter Paixao-Cortes, Data Engineer, Future iQ

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-CÔRTEES, MA, BA

DATA ENGINEER, FUTURE IQ

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

RECENT PROJECT EXPERIENCE

- Mitchell Forward 2040, South Dakota, 2019
- Park City Vision 2020, Utah, USA, 2019
- New England Regional Defense Industry Collaboration Initiative, USA, 2019-2020
- City of Smithville Visioning and Strategic Action Plan project, Missouri, USA, 2019
- Tillamook County Strategic Planning, Oregon, USA, 2019
- Snohomish County Regional Tourism Destination Development, WA, 2018
- McHenry County College, Crystal Lake, IL, 2018
- Middle Georgia Charrette and Regional Planning, Georgia, 2018
- Coppell Vision 2040, Coppell, Texas, 2018
- Rural Community Assistance Partnership, Washington D.C. 2018
- Wayzata Community Vision, Wayzata, MN, 2017-2018
- Hilton Head Island Our Future, South Carolina, 2017-2018

WALTER R. PAIXÃO-CÔRTEES

walter@future-iq.com



2.1.4 Tobiloba Adaramati, Data Analyst, Future iQ

RÉSUMÉ



EDUCATION

B.Tech. (First Class) Degree
in Mathematics Education
Federal University of Technology, Minna, 2015
N.C.E Degree in Computer and Mathematics
Federal College of Education
(Technical), Akoka, 2011

EMPLOYMENT

Data Analyst. Future iQ
USA and Europe, 2017 – Present
Results Measurement Expert. JMSF
Agribusiness, Nigeria, 2018 – Present
CEO. Growth Analytics Consulting
Nigeria, 2017 – Present
Monitoring and Evaluation Analyst.
Solina Group, Nigeria, 2016 – 2017
Research Analyst. Solina
Group Nigeria, 2015 – 2016

TOBILOBA ADARAMATI, *B. Tech. (Edu).*

Data Analyst

Tobiloba Adaramati 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

- Mitchell Benchmark Analysis Report, 2019
- Smithville Benchmark Analysis Report, 2019
- Edina Medical Cluster Analysis, 2019

RELEVANT PUBLICATIONS

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

TOBILOBA ADARAMATI

tobiloba@future-iq.com

2.1.5 Jon Stover, Managing Director, Jon Stover & Associates, LLC

Jon Stover, Managing Partner

Jon Stover is the founder and Managing Partner of Jon Stover & Associates. He specializes in helping communities shape visions for their future based on current conditions and local assets. Jon provides real estate market analysis, fiscal and economic impact analysis; and economic development strategies for a range of clients. Stover has secured, planned, and directed hundreds of projects working for and partnering with county agencies, city departments, community groups, non-profit organizations, universities, neighborhood stakeholder organizations, real estate developers, and private business owners.

Education

*University of Pennsylvania
Masters of Urban Planning
School of Design*

*Certificate in Real Estate Development
Wharton School of Business and
School of Design
(Joint Program)*

Speaking Engagements

"Tips for Measuring the Impact of Your Program." Downtown Pennsylvania Conference, Pennsylvania Main Streets (2019)

"Building Resiliency on Main Street." Main Street NOW, Seattle (2019)

"Breaking the Black Box of Economic Impact." Main Street NOW, Seattle (2019)

NPR's All Things Considered, Guest Interview (2018)

"Using Data to Bolster Decision Making." Tennessee Retail Summit, Tennessee Main Streets (2018)

"Quantifying the Nighttime Economy in Your City." Sociable City Summit, New Orleans (2018)

"Local and National Retail Trends: How Can We Help Businesses Compete Now and In the Future." DC Main Street Executive Director Training (2018)

"Understanding the Economic and Fiscal Impact of Your Programs." Neighborhoods USA Conference (2017)

Relevant Project Experience

Real Estate Analysis to Inform Prince George's County-Wide Zoning Rewrite | Prince George's County, Maryland, Maryland-National Capitol Parks and Planning Commission

Kansas City Urban Redevelopment Strategy | Kansas City, Missouri
Greater KC Local Initiatives Support Corporation

Buford Highway Masterplan Real Estate & Demographic Analysis | Atlanta, Georgia
Atlanta Regional Commission, City of Chamberlee, and City of Doraville

Old South Baton Rouge Economic Development Plan | Baton Rouge, Louisiana
Center for Planning Excellence, Arts Council

Downtown East Re-Urbanization Strategy and Small Area Plan | Washington, DC
DC Office of Planning

Reunion Square Catalytic Impact Assessment TIF Financing Analysis | Washington, DC
Four Points, LLC

Nighttime Economy Impact Assessment Best Practices and Recommendations
Responsible Hospitality Institute

Mid City East Small Area Plan | Washington, DC
DC Office of Planning

Lake Worth Arts and Cultural Economic Development Strategy | Lake Worth, Florida
Lake Worth Community Redevelopment Association

Economic Generators and Catalyst Study | Prince George's County, Maryland
Maryland – National Capitol Park & Planning Commission

Eastover Sector Plan Redevelopment Strategy | Forest Heights, Maryland
Maryland – National Capitol Park and Planning Commission

Southwest Neighborhood Plan | Washington, DC
DC Office of Planning

Economic and Fiscal Impact Study of Hershey Corporation and Tourism | Hershey, Pennsylvania, RDS, WTL+a, Hershey Corporation

CHASE Action Agenda | Washington, DC
DC Office of Planning, DC Department of Housing and Community Development

2.1.6 Leslie Deacon, Project Manager, Jon Stover & Associates, LLC

Leslie Deacon, AICP, Senior Consultant | Project Manager

Leslie Deacon, AICP, specializes in the intersection between physical and land use planning, economic analysis, and community development. Her professional expertise includes zoning and land use analysis, real estate market analysis, economic development strategies and impact analysis, and site feasibility studies. As her work spans from parcel specific to nationwide studies, Ms. Deacon leverages her background in architecture and urban planning to provide communities with insights on planning for projected changes and leveraging local assets and competitive advantages through master planning and land use consulting services.

Education

*Columbia University
Masters of Science
in Urban Planning*

*University of Cincinnati
Bachelor of Science
in Architecture*

Affiliations

*American Institute of
Certified Planners
American Planning Association
Commercial Real Estate Women*

Speaking Engagements

*"Tips for Measuring the Economic
Impact of Programs and Initiatives"
Great Lakes Main Street Conference
(2019)*

*"Breaking the Black Box of Economic
Impact." Main Street NOW,
Seattle (2019)*

*National Main Street Center Training
Webinar with Main Streets (2018)*

*"Growth and Adaptation of a Main
Street." Main Street NOW,
Kansas City (2018)*

*"The Numbers Are In. Learn the
Economic Impact of Your Main Street
Program." Main Street NOW, Pittsburgh
(2017)*

*"The Power of Tracking Your Main
Street's Economic Performance." Main
Street NOW, Milwaukee (2016)*

Experience

*Land Use Planner
Bayer Becker
Cincinnati, Ohio*

Relevant Project Experience

Lake Worth Arts and Cultural Economic Development Strategy | Lake Worth, Florida
Lake Worth Community Redevelopment Association

Downtown East Small Area Plan | Washington, DC
DC Office of Planning

Middlebury Downtown Master Plan | Middlebury, Vermont
Town of Middlebury

Reunion Square Catalytic Impact Assessment TIF Financing Analysis | Washington, DC
Four Points, LLC

Buford Highway Masterplan Real Estate & Demographic Analysis | Atlanta, Georgia
Atlanta Regional Commission, City of Chamberlee, and City of Doraville

Hechinger Mall Visioning and Impact Analysis | Washington, DC
H Street Main Street

Cleveland Park Strategic Plan | Washington, DC
DC Deputy Mayor's Office of Economic Development and Planning

Streetcar Ridership Economic Impact Analysis | Washington, DC
H Street Main Street

Economic and Fiscal Impact Study of Hershey Corporation and Tourism | Hershey, Pennsylvania, RDS, WTL+a, Hershey Corporation

Re-Imagining Reeves Market Study and Development Opportunity Assessment | Washington, DC, DC Office of Planning, DC Deputy Mayor's Office of Planning and Economic Development

Indian River Lagoon Impact Assessment | St. Lucie County, Florida
WTL+a, Treasure Coast Regional Planning Council

Aberlin Springs Residential Master Plan | Greater Cincinnati, Ohio
North Pointe Group, Pendragon Homes

Reading Road Corridor Master Plan | Mason, Ohio
*City of Mason**

**Projects conducted while at Bayer Becker.*

2.1.7 Aaron King, Consultant, Jon Stover & Associates, LLC

Aaron King, Analyst

Aaron King has successfully completed projects relating to impact assessments, market analyses, development feasibility and positioning, commercial district revitalization, and local business support strategies. Mr. King combines his background in public policy and community development to engage with stakeholders, collect and analyze data, and craft actionable strategies for a range of public and private sector clients, which have included government agencies, real estate developers, economic development corporations, and community development nonprofits.

Education

University of Delaware
Bachelor of Arts in Public Policy,
Urban Policy, Planning, and Historic
Preservation Concentration

Speaking Engagements

“Building Retail Resiliency on Main
Street.” Main Street NOW, Seattle
(2019)

“Growth and Adaptation of a Main
Street.” Main Street NOW,
Kansas City (2018)

Experience

Co-Founder & Director
Better Block Wilmington
Wilmington, DE

Relevant Project Experience

Middlebury Downtown Master Plan | Middlebury, Vermont
Town of Middlebury

Fiscal Impact Analysis of Connected City Master Plan | Pasco County, Florida
WTL+a, Pasco County

MidCity East Small Area Plan | Washington, DC
DC Office of Planning

Lake Worth Arts and Cultural Economic Development Strategy | Lake Worth, Florida
Lake Worth Community Redevelopment Association

Reunion Square Catalytic Impact Assessment TIF Financing Analysis | Washington, DC
Four Points, LLC

Tennessee Main Street Economic and Fiscal Impact Assessment | State of Tennessee
Tennessee Department of Economic & Community Development

Retail Market Analysis, Vacancy Support and Activation Strategy | Washington, DC
Friends of Rhode Island Avenue

Statewide Reliability Assessment of Historic Main Street Data | State of Michigan
Michigan Economic Development Corporation

Economic Impact of Capital Improvements and Infrastructure on Local Businesses |
Washington, DC, DC Water Agency

Hechinger Mall Redevelopment Visioning and Impact Assessment | Washington, DC
H Street Main Street

Fiscal Impact of Pineland Prairie Proposed Development | Martin County, Florida
Martin County

Deanwood Retail Market and Enhancement Strategy | Washington, DC
Ward 7 Business Partnership

Grant Support and Strategic Services for Legacy Businesses | Washington, DC
Ward 7 Business Partnership

MLK Gateway Redevelopment Market Analysis and Employment Impact Assessment |
Washington, DC, Menkiti Group

2.2 References

Below are four recent project contacts for Future iQ 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>Coppell Vision 2040 and Strategic Plan, Texas (2018-2019)</p>	<p>Traci E. Leach Deputy City Manager 225 E. Parkway Blvd. City of Coppell, TX Tel: 972-304-3672 Email: TLeach@coppelltx.gov</p>
<p>Nodes and Modes – Bridging Vision to the Comp Plan, City of Edina, Minnesota (2017)</p>	<p>Mike Fischer, Edina Council Member City of Edina 4801 W. 50th Street Edina, MN 55424 Tel: 612-752-6920 Email: mike.fischer@lhbcorp.com</p>
<p>Vision Edina, Edina, Minnesota (2014-2015)</p>	<p>Scott Neal, City Manager City of Edina 4801 W. 50th Street Edina, MN 55424 Tel: 952-826-0401 Email: sneal@edinamn.gov</p>
<p>Allen County, Ohio – Collaborative Growth Plan (2015-2017)</p>	<p>Jeff Sprague, President/CEO Allen Economic Development Group 144 S. Main Street, Ste. 200 Lima, OH 45801 Tel: 419-222-7706 Email: Spraguej@aedg.org</p>

Below are two recent project contacts for Jon Stover and Associates that may be used as references for this project. Additional references may be provided as needed.

<p>Evelyn Kasongo Lead Planner for Equity Initiatives, Neighborhood Planning District of Columbia Office of Planning (202) 442-7619 Evelyn.kasongo@dc.gov 1100 4th Street SW, Suite E650 Washington, DC 20024</p>	<p>Cristina Amoruso DC Main Streets Coordinator District of Columbia Department of Small and Local Business Development (202) 701-7673 Cristina.amoruso@dc.gov 441 4th Street NW, Suite 850N Washington, DC 20001</p>
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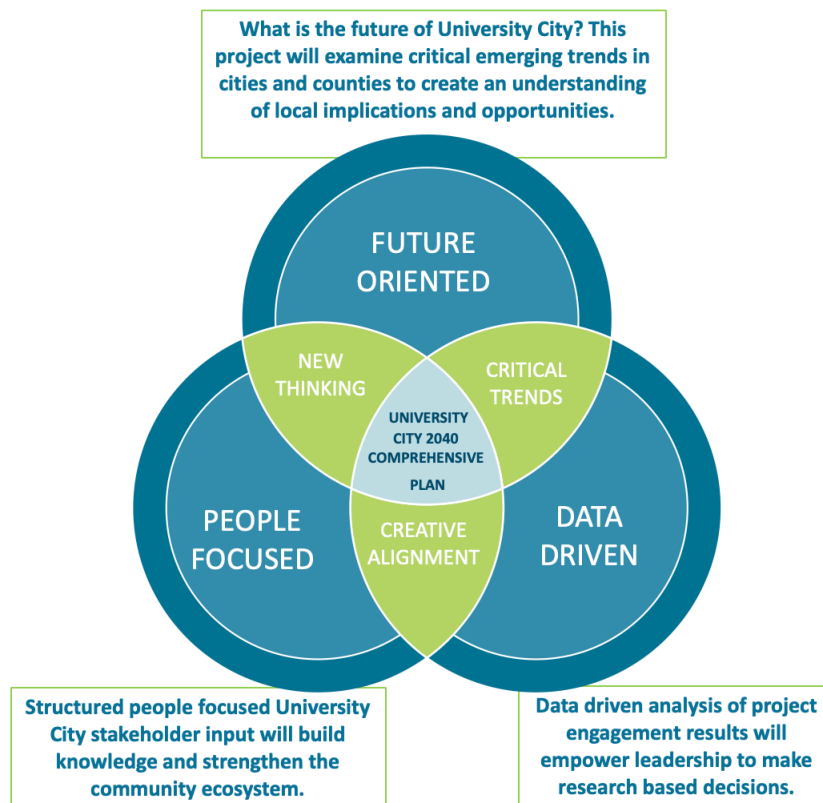
3.0 Proposal

3.1 Proposal Overview – Methodological Approach

Future iQ and JS&A bring both global and national perspectives 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 planning for cities, counties, regions, nonprofits and global corporations. Future iQ and JS&A will use this experience to guide and inform this project and will work with the CPC, the Planning Commission, City Staff and Council to develop comprehensive, future-oriented, sustainable and implementable strategies to support the new University City 2040 Comprehensive Plan. The Plan will balance priorities across the important dimensions specific to University City and incorporate global, national 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.

Methodological Framework



3.1.1 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 and JS&A will draw from their respective 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.



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



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



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



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



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



Global 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 urban living (2018).



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

3.1.2 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 and JS&A'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 community stakeholder 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.

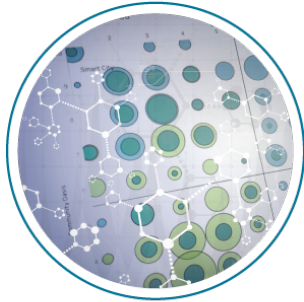


Student Sessions The Youth Voice

Individual classroom and large group visioning sessions empower the youth voice in future planning for communities.

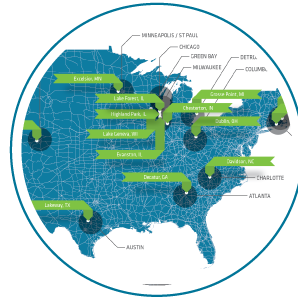
3.1.3 Data Driven Methodology

Future iQ and JS&A specialize 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 comprehensive 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 studies and analyses of cohort communities provide valuable insight to clients.



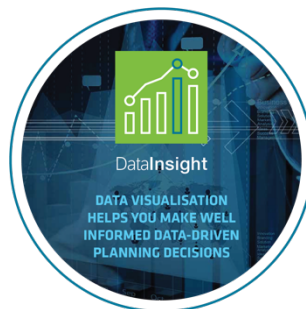
Data Visualization

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.

3.2 Proposed Work Plan and Schedule

The proposed scope of work project plan is implemented in phases that build momentum around an aligned vision and strategies for University City’s 2040 Comprehensive Plan. The production of deliverables is divided into five phases outlined below. The plan is intended to be realistic and implementable and presented in an easy to understand and reader friendly manner for all audiences. It will identify future opportunities and align resources for development throughout the City. All key areas of work, expectations and deliverables outlined in the RFP will be included in the scope of work and incorporated into the following phases.

Proposed Project Work Plan



Proposed Schedule

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

Key Phases	Key Deliverables/Benchmarks	O	N	D	J	F	M	A	M	J	J	A	S
Phase 1: Initial Planning and Baseline Review	Initial planning, meetings and schedule	■	■										
	Public engagement plan	■	■										
	Background research/baseline review of existing plans and relevant information	■	■	■									
	Benchmark Study and Analysis Report	■	■	■									
Phase 2: Future Scenarios	Community survey			■	■								
	University City Future Think-Tank				■								
	Scenarios of the Future Report				■	■							
Phase 3: Public Engagement and Communications	Public launch to gather input and explore the Comp Plan process					■							
	Stakeholder interviews and Vision workshops					■	■						
	Vision survey, data collection & analysis					■	■	■	■				
	Data visualization platform					■	■	■	■				
	Inventory and assessment of issues and opportunities						■						
Phase 4: Update Specified Elements of the Comprehensive Plan	Refine community goals, priorities and policies to reflect updated Vision						■	■					
	Analysis of Comprehensive Plan Sections						■	■	■				
	Focus groups and planning meetings on Comp Plan sections/elements								■	■			
	Develop, draft and vet policy recommendations for the Comp Plan								■	■			
	Form base code concepts and suggestions									■	■		
	Draft updated Comp Plan to City staff and Council for input									■	■		
	Develop and draft 5-year Implementation Strategy (Strategic Plan)									■	■		
	Revisions to Comp Plan and Implementation Strategy										■	■	
Phase 5: University City 2040 Comprehensive Plan	Implementation roadmap drafted for approval										■	■	
	Final version of University City 2040 Comprehensive Plan											■	■
	Future Summit / Final Presentation												■

3.3 Community Engagement Plan

Community engagement is a cornerstone of Future iQ and JS&A’s methodology and is woven throughout the planning process. A detailed public engagement plan will be determined in close consultation with City staff and the Comprehensive Plan Advisory Committee (CPC) during the initial project calls and meetings in phase one. Below is an outline of engagement activities as they occur in phases 1-5 of the proposed project work plan. It is understood that University City desires significant public input and engagement into the planning process.

3.3.1 Phase 1: Initial Planning and Baseline Review

This project will begin with meetings between Future iQ and JS&A team members, the Comprehensive Plan Advisory Committee (CPC) and University City staff to establish a final work program and schedule specifying the number and type of planned meetings, weekly updates, engagement activities and deliverables to occur throughout the project. It is understood that Future iQ will hold regular Project Meetings as well as Meetings with the CPC, Staff, Planning Commission and Council, and attend the Plan’s formal adoption by the Planning Commission and City Council.



As specified in the RFP and mentioned above, phase one will include the development of a detailed public engagement plan for the duration of the project. As part of this plan, Future iQ will assist University City in communications about the comprehensive master planning process, 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. Team members will work throughout the project to update and keep current the project information distributed to community stakeholders.

Phase one will also involve significant background research including exploration of existing planning efforts and a baseline review of existing plans and relevant information. This research will be undertaken to understand those strategic directions already established and to identify progress made towards meeting those objectives. To support the baseline review, phase one will include the development of a benchmark study and analysis that will compare University City to similarly sized first ring cities facing like challenges. Future iQ and JS&A will bring their extensive background knowledge of neighborhood node development and urban design and development to inform this analysis.



- Deliverables** from Phase 1 will include:
- Initial planning, meetings and schedule
 - Public engagement plan
 - Background research and baseline review
 - Benchmark Study and Analysis



3.3.2 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 the strategic and comprehensive plans for University City's future using a scenario-based strategic planning methodology. Using trend research, industry analysis, and expectations about City development 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 Future Think-Tank. For this project, the scenario planning approach will help stakeholders understand the potential and implications of various development directions and explore the synergies in adjacent sectors. This will allow for an understanding of how different futures could impact development of different locations within and around 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:

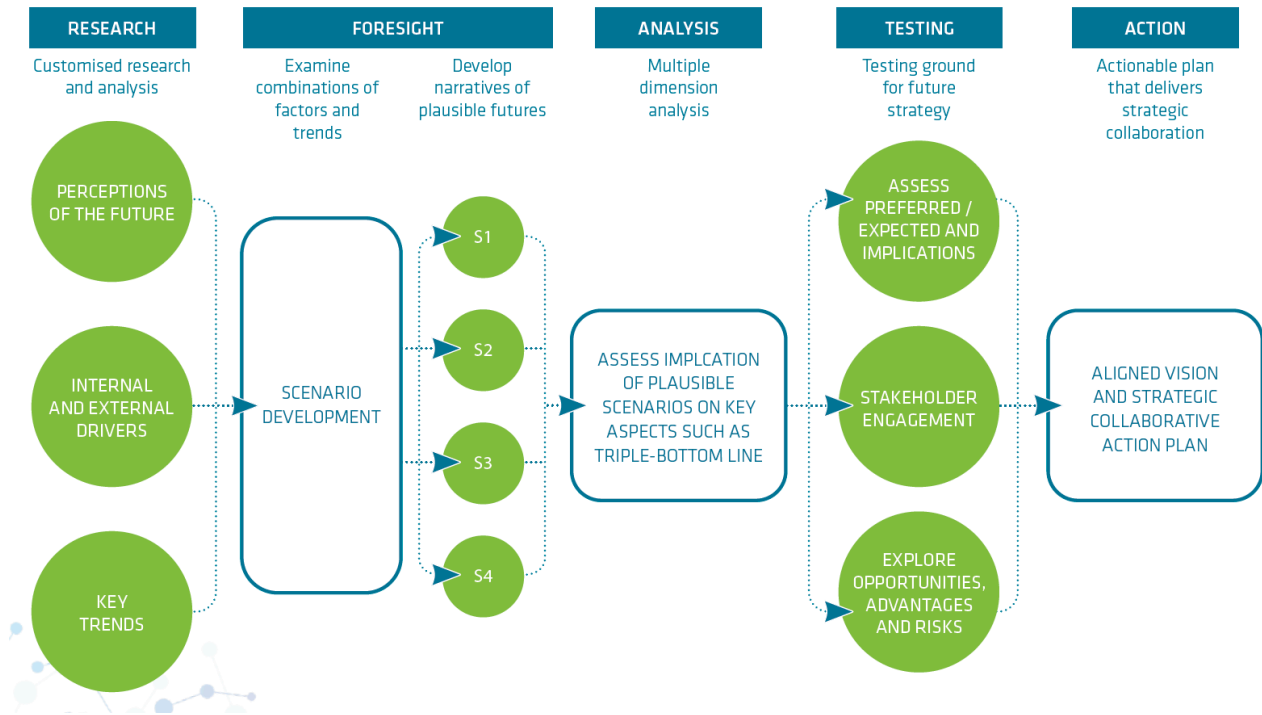
- It is customizable and built around the project plan.
- It is data and evidence-based, ensuring a robust outcome, and a vision and plan that deals with reality, rather than a 'wish-list.'
- Stakeholder engagement is front and center in the design, and community stakeholders have the option to have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

There are several important design principles to the proposed strategic 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 comprehensive master plan update, stakeholders will need clarity and a common understanding of the drivers impacting University 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 community stakeholders as possible.

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

Below is the visual outline of how Future iQ’s scenario-based visioning and strategic planning process work:



Deliverables from Phase 2 include:

- Develop and administer community survey
- University City Future Think-Tank
- Scenarios of the Future Report



Future**Game** Decision**Path** People**Link** Future**Shift** Data**Insight** Future**Insight**

SIMULATION LEARNING || SCENARIO PLANNING || NETWORK ANALYSIS || MOBILIZE + IMPLEMENT || VISUALISE COMPLEXITY || KNOWLEDGE+ CHANGE

How a Think-Tank Works

The Think-Tank process helps to define a broad vision, goals and directions. It is conducted as a highly participatory 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 Comprehensive Master Plan Update, 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 community 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 City planning for the future will incorporate the priorities and alignment for all community 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 community 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 new 2040 Comprehensive Plan.

3.3.3 Phase 3: Public Engagement and Communications

Engagement is a cornerstone of Future iQ’s strategic planning methodology. Key to effective stakeholder engagement is building momentum and excitement around the plan as it is created. Future iQ and JS&A will use 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 and JS&A will go deep and wide to gather input, and strive to reach those who don’t usually participate in the public process. An example of this varied approach would include using Instagram in the social strategy so people can engage visually and give feedback on the pros and cons of things they like or don’t like in the City.



Following the Think-Tank, the Team 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 community and economic development, and industry leaders. To begin this phase, the project team and the City will host a public launch of the Comprehensive planning process at an event that will seek to gather public input on the various elements of the

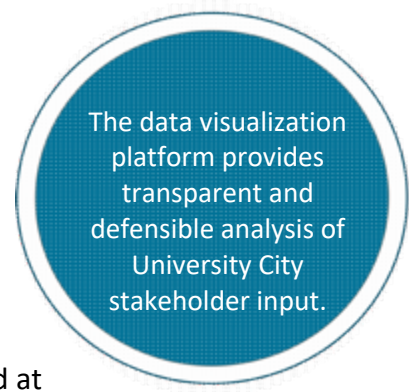


Comprehensive Plan. The two-hour evening launch will include a short presentation of Think-Tank visioning results with an explanation of its bridging to the strategic comp planning process. Future iQ’s specific work in “Nodes and Modes” is highlighted in a recent project in Edina, MN, an inner-ring suburb of Minneapolis. These two workshops 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. The launch will involve tables for each Comp Plan element that will encourage input and provide information to the public on the current status of each element. Information will also be provided as to how community members may further participate in the planning process.

During this phase, Team members will also host targeted visioning sessions, conduct interviews and a Vision survey to gather additional input. An inventory and assessment of issues and opportunities will be compiled to inform the development of the Comprehensive Master Plan.

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 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:
- Public launch to gather input and explore the Comp Plan process
 - Stakeholder interviews and Vision workshops
 - Vision survey, data collection and analysis
 - Data visualization platform
 - Inventory and assessment of issues and opportunities



3.3.4 Phase 4: Update Specified Elements of the Comprehensive Master Plan

Following the engagement phase, Future iQ and JS&A will begin work on updating the specified elements of the 2040 Comprehensive Plan. This process will involve refining community goals, priorities and policies to reflect the updated community vision and strategic planning process. Focus groups on each element of the comprehensive plan will be held to gather input on recommended initiatives and priorities. Planning meetings will also be held with the CPC, Planning Commission, Planning Department, City Council and Staff to further analyze and develop the plan updates.



Future IQ and JS&A will work together to assess the existing conditions, understand the community’s shared vision for the future, and work with the City to identify goals, needs, and opportunities. This analysis and conversations will allow our team to work collectively with the Comprehensive Plan stakeholders to ensure findings and recommendations are appropriate and aspirational yet achievable within the coming twenty years. In addition to the introductory community assessment, the Comprehensive Plan analysis components will include:

- **Vision and Goals** will be drawn from the visioning process in phases two and three and vetted throughout the planning process. The vision will be incorporated into various planning elements of the Comp Plan and serve as the guide for strategic action planning.
- **Demographics and Economics Overview** will include demographic data and narrative from the Benchmark analysis. The economics overview will provide a snapshot of University City’s economic profile.
- **Population and Demographic Trends and Projections** including data from the Benchmark report on population and demographic trends and projections will be incorporated. This forms a foundational component informing the specific assessment work that takes place in individual plan elements to follow.
- **Economic Trends and Forecasts** will incorporate strategies, goals and actions from the new Economic Development Strategic Plan currently being developed by University City’s Economic Development Department. This assessment will also identify economic trends and forecasts, especially as they relate to workforce development.
- **Natural Resources and Stormwater Management** including inventory and assessment of existing resources and stormwater management systems, future projections of natural resource stock risk and conditions and policies in place for low impact development approaches. Topographical opportunities for stormwater detention will be analyzed, as well as rainfall patterns and flood risk mapping and future projections.
- **Land Use Analysis** including both analysis of existing land uses and well as developing a future land use plan for the city. Land use decision-making, aligning with community goals, needs and city visions for the future, is often at the crux of Comprehensive Planning. This assessment will include working with University City to identify policies and actions for implantation that will help guide future development and land use decisions. Our team will

also assess opportunities to incorporate Form Based Code to guide development and policies for land use.

- **Housing** including inventory and assessment of existing housing and population density within University City but also how housing needs may evolve based on projected population and demographic changes in the coming years. This analysis will also pay particular attention to residential areas within University City that are abandoned and deteriorated including dwellings and structures in the 3rd ward and along Olive Boulevard. Based on initial areas University City has expressed interest and opportunities, we anticipate assessing recommendations that will help encourage owner-occupied residential properties, mixed-income residential developments, and planned developments within the targeted areas.
- **Transportation** and access analysis will identify key issues and opportunities surrounding key topics including transportation choice, commuting patterns, multimodal or shared path opportunities and networks, complete streets, MetroLink and regional transit considerations, transit-friendly or -oriented development opportunities, etc.
- **Public Facilities** inventory and supply analysis of existing parks and recreation options in University City and how population projections and demographic changes may affect future capacity.
- **Parks and Recreation** current supply and projected demand analysis for municipal uses, community facilities and civic centers. The demand analysis will further assess the impacts of population projections and demographic shifts on public schools, fire and emergency services, and public safety within University City.
- **Implementation** including the strategic pillars and action areas of the 5-year implementation strategy. This will incorporate the timing of implementing change to physical infrastructure and community assets, and outline anticipated changes to local controls and policies to achieve plan objectives.

It should be noted that JS& A will lead in leveraging GIS for this project. Each section of the Comprehensive Plan will include GIS maps and analysis as applicable and appropriate.

Upon completion of the focus group engagement in phase four, Future iQ and JS & A will work closely with the CPC, Planning Commission, Planning Department, City Council and Staff to develop, draft and vet policy recommendations for the 2040 Comprehensive Plan. After the Comprehensive Plan is drafted, our proposed project scope includes working with City staff and agencies to develop and draft a 5-Year Implementation Strategy (Strategic Plan). This Strategy will feature measurable objectives, indicators, benchmarks and targets to initiate and begin to implement the recommendations articulated in the Plan. Input and feedback on the draft plan and implementation strategy will be sought and revisions will be made accordingly.

Accountable Implementation

Importantly, the Future iQ and JS&A team values creating plans that are action-oriented and implementable to ensure that our clients have the ability to incrementally execute decisions overtime to achieve the desired collective vision. Our philosophy follows the American Planning

Association’s latest standards for Comprehensive Plans. We will ensure that the University City 2040 Comprehensive Plan will be best positioned for implementation by understanding the collective community goals and vision, developing objectives that support these goals, focusing policies to guide decision making, and articulating actions to carry out the Comprehensive Plan.

Deliverables for Phase 4 include:

- Refine community goals, priorities and policies to reflect updated Vision
- Analysis of Comprehensive Plan Sections
- Focus Groups and planning meetings on Comp Plan Sections/Elements
- Develop, draft and vet policy recommendations for Comp Plan
- Form base code concepts and suggestions
- Draft updated Draft updated Comp Plan to City staff and Council for input
- Develop and draft 5-year Implementation Strategy (Strategic Plan)
- Revisions to the Comprehensive Plan and Implementation Strategy per City feedback

3.3.5 Phase 5: University City Comprehensive Master Plan Update

Final steps in the comprehensive planning process incorporate all input on the draft plan from University City staff and Council, the public, CPC and the Planning Commission. Team members will also use this opportunity to work with the City and others to make sure the implementation strategy plans for fiscal sustainability by developing realistic, achievable targets. A strategic roadmap will be developed to recommend a course of action along a timeline to implement the 2040 Comprehensive Plan. 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. Once the plan is approved by the City Council, Future iQ will provide an electronic version of the plan and print copies as agreed upon in the initial planning meetings.

The final University City 2040 Comprehensive Plan will be presented by the Project Director to the City at a meeting designated in the initial project planning discussions. Future iQ recommends this presentation in the form of a public ‘Future Summit’. The Future Summit launches the plan and invites the community to learn about how their input has helped to inform community planning looking out to 2040.

Deliverables for Phase 5 include:

- Implementation Roadmap drafted for approval
- Final version of the University City 2040 Comprehensive Plan
- Future Summit / Final presentation of University City 2040 Comprehensive Plan

4.0 Proposed Budget

Future iQ operates on a fixed-price delivery. The fees below include all travel, accommodation costs and overheads for the Project Director, subcontractors and staff. Future iQ assumes that University City will provide venues for workshop sessions and presentations, as required. **Please note that Future iQ's fees and project plan are flexible and easily scalable depending on the needs of University City.**

Key Phases	Key Components	Proposed Fees
Phase 1: Initial Planning and Baseline Review	• Initial planning, meetings and schedule	\$3,360
	• Public engagement plan for duration of the project	\$1,000
	• Background research / baseline review of existing plans and relevant information	\$4,760
	• Benchmark Study and Analysis Report	\$5,000
Phase 2: Future Scenarios	• Develop and administer community survey	\$1,500
	• University City Future Think-Tank	\$12,000
	• Scenarios of the Future Report	\$5,000
Phase 3: Public Engagement and Communications	• Public launch to gather input and explore Comp Plan process	\$5,000
	• Stakeholder interviews and Vision workshops	\$12,000
	• Vision survey, data collection and analysis	\$3,000
	• Data visualization platform	\$3,500
	• Inventory and assessment of issues and opportunities	\$4,000
Phase 4: Update Specified Elements of the Comprehensive Plan	• Refine community goals, priorities and policies to reflect updated Vision	\$3,000
	• Analysis of Comprehensive Plan Sections:	\$3,630
	○ Demographics and Economics Overview	\$2,950
	○ Population and Demographic Trends and Projections	\$2,000
	○ Economic Trends and Forecasts	\$2,950
	○ Natural Resources and Stormwater Management	\$2,000
	○ Land Use Analysis	\$9,120
	○ Housing	\$5,560
	○ Transportation	\$3,990
	○ Public Facilities	\$2,410
	○ Parks and Recreation	\$2,410
	• Focus groups and planning meetings on Comp Plan Sections/Elements	\$25,000
	• Develop, draft and vet policy recommendations for Comp Plan	\$15,200
	• Form base code concepts and suggestions	\$4,020
• Draft updated Comp Plan to City staff and Council for input	\$9,700	
• Develop and draft 5-year Implementation Strategy (Strategic Plan)	\$8,670	
• Revisions to Comp Plan and Implementation Strategy per City feedback	\$8,820	
Phase 5: 2040 Comp Plan	• Implementation Roadmap drafted for approval	\$2,000
	• Final version of University City 2040 Comprehensive Plan	\$4,860
	• Future Summit / Final Presentation	\$6,020
JS&A Expenses	• Expenses for Data, Travel, Printing, Other Project Costs	\$3,510
Total	FIXED PRICE PROPOSAL	\$184,430

Proposed payment schedule: 20% on signing contract; 20% at completion of phases 2, 3, 4, 5
For a Detailed Breakout of Future iQ and JS&A Expenses, please see **Appendix B.**

5.0 Appendix A: Detailed Project Descriptions

Following are the detailed project descriptions from relevant experience in Section 1.1.3.1.

- **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/>
- **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/>
- **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/>
- **City of Coppell, TX, Community Vision and Strategic Plan (2018-2019).** 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/>
- **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/>

- **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/>
- **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/>
- **Tillamook County, OR, Strategic Vision and Action Plan (2018-2019).** Future iQ was contracted to lead the county in the development of a strategic vision for how to manage tourism from a facilities perspective. The goal was to develop evaluation criteria (a decision-making tool), that will inform tourism-related facility investments and guide grant program investments with the purpose of applying resources to identified priority projects that support the overall Strategic Vision. The project involved a situational analysis, Think-Tank, stakeholder engagement and data analysis resulting in a Strategic Vision and Action Plan. <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/>
- **McHenry County College, IL, Strategic Visioning and Foresight (2018).** McHenry County College is embarking on an examination of the county ecosystem to help inform the College as it prepares for an internal strategic planning effort. Future iQ was engaged to provide strategic visioning and planning guidance that will position the College as a ‘thought-leader’ in the community and produced a strategic foresight document that would examine future evolution in the County. <https://future-iq.com/project/mchenry-county-college-crystal-lake-illinois-2018/>

- **Edina Chamber of Commerce Medical/Wellness Destination Strategic Marketing Plan, Edina, MN (2018-2019).** Future iQ was engaged to support the Edina Chamber of Commerce’s strategic plan development by creating a roadmap to develop an innovative, vibrant, regional medical/wellbeing destination in Edina. The project involved significant research on centers of excellence, innovation hub potential, and educational opportunities for the community. The resulting roadmap produced recommendations for implementation of the destination strategic marketing plan. <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/>
- **Global Think-Tanks at Windsor Castle, U.K. (2012 and December 2018).** In 2012, Future iQ hosted a global Think-Tank forum at Windsor Castle on ‘Building Sustainable Regional Communities.’ The event explored a series of key questions critical to building the future of regional economies and communities. Future iQ hosted an additional global Think-Tank at Windsor Castle in December 2018 to explore ‘The Future of Urban Living’. Global experts from gathered at the 2018 Think-Tank to discuss and debate future trend and impacts on urban living worldwide. <http://future-iq.com/project/global-think-tank-windsor-castle/>
- **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/>
- **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/>
- **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/>

- **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/>
- **Maine Woods Tourism Development, ME (2017-2018).** Future iQ worked with a consortium of organizations to explore the tourism and economic development potential in the Maine Woods area. This project covers most of Maine, and includes 7 regional areas, primarily to the west of the coastline. The work included exploration of the potential economic impacts of tourism, and research on important emergent trends shaping outdoor and recreation tourism sectors. <http://future-iq.com/project/maine-woods-usa-2018/>
- **North Tyrrhenian Sea Mediterranean Ports Project, Italy/France (2015).** Future iQ was contracted to implement a future oriented scenario-planning methodology with broad cross-sectional representatives from various port cities within four large sub-regions producing individual planning reports for each region. The four studies were compiled in a Joint Analysis Report and presented as part of the Strategic Plan of the port cities of the North Tyrrhenian Sea. <http://future-iq.com/project/mediterranean-sea-ports-project/>
- **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/>
- **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/>

6.0 Appendix B: Detailed Project Budget Breakout

UNIVERSITY CITY - PROPOSED BUDGET

	JS&A Fee	FIQ Fee	TOTAL FEE
Task 1. Initial Planning and Baseline Review	\$3,620	\$10,500	\$14,120
Initial Planning, Meetings, and Schedule	\$1,360	\$2,000	\$3,360
Development of a Public Engagement Plan for Duration of the Project	\$0	\$1,000	\$1,000
Background Research / Baseline Review of Existing Plans and Relevant Info	\$2,260	\$2,500	\$4,760
Benchmark Study and Analysis Report	\$0	\$5,000	\$5,000
Task 2. Future Scenarios	\$0	\$18,500	\$18,500
Develop and Administer Community Survey	\$0	\$1,500	\$1,500
University City Comp Plan Future Think-Tank	\$0	\$12,000	\$12,000
Scenarios of the Future Report	\$0	\$5,000	\$5,000
Task 3. Public Engagement and Communications	\$0	\$27,500	\$27,500
Public Launch to Gather Input and Explore Comp Plan Process	\$0	\$5,000	\$5,000
Stakeholder Interviews and Vision Workshops	\$0	\$12,000	\$12,000
Vision Survey, Data Collection and Analysis	\$0	\$3,000	\$3,000
Data Visualization Platform	\$0	\$3,500	\$3,500
Inventory and Assessment of Issues and Opportunities	\$0	\$4,000	\$4,000
Task 4. Update Specified Elements of the Comprehensive Plan	\$52,950	\$58,480	\$111,430
Refine Community Goals, Priorities and Policies to Reflect Updated Vision	\$0	\$3,000	\$3,000
Analysis of Comprehensive Plan Sections:	\$1,630	\$2,000	\$3,630
Demographics and Economics Overview	\$450	\$2,500	\$2,950
Population and Demographic Trends and Projections	\$450	\$2,500	\$2,950
Economic Trends and Forecasts	\$1,000	\$1,000	\$2,000
Natural Resources and Stormwater Management	\$0	\$2,000	\$2,000
Land Use Analysis	\$8,620	\$500	\$9,120
Housing	\$5,060	\$500	\$5,560
Transportation	\$3,490	\$500	\$3,990
Public Facilities	\$1,910	\$500	\$2,410
Parks and Recreation	\$1,910	\$500	\$2,410
Focus Groups and Planning Meetings on Specified Elements/Sections of Comp Plan	\$9,020	\$15,980	\$25,000
Develop, Draft and Vet Policy Recommendations for Comp Plan	\$7,200	\$8,000	\$15,200
Form Base Code Concepts and Suggestions	\$2,020	\$2,000	\$4,020
Draft Updated Comp Plan to City Staff and Council for Input	\$2,700	\$7,000	\$9,700
Develop and Draft 5 Year Implementation Strategy	\$3,670	\$5,000	\$8,670
Revisions to Comp Plan and Implementation Strategy per City Feedback	\$3,820	\$5,000	\$8,820
Task 5. University City Comprehensive Plan Update	\$3,380	\$9,500	\$12,880
Implementation Roadmap Drafted for Approval	\$0	\$2,000	\$2,000
Final Version of University City Comprehensive Plan Update	\$2,360	\$2,500	\$4,860
Future Summit / Presentation of Final University City Comp Plan Update	\$1,020	\$5,000	\$6,020
JS&A PROJECT EXPENSES			TOTAL
JS&A Expenses for Data, Travel, Printing, and Other Project Costs (Assumptions: 3 JS&A in-person visits)	\$3,510	\$0	\$3,510
	\$59,950	\$124,480	\$184,430