

CITY OF SUGAR LAND, TEXAS
RFQ NO. 2024-14
STRATEGIC PLANNING CONSULTANT RFQ

UPDATED PROPOSAL
June 26, 2024



Submitted by:
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Introduction



Future iQ, Inc.
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June 26, 2024

Brittney P. Sinclair
Strategic Initiatives Manager
Strategic and Government Affairs
City of Sugar Land
2700 Town Center Blvd. North
Sugar Land, TX 77479

Re: RFQ No. 2024-14 for Strategic Planning Consulting Services

Dear Brittany,

REVISED PROPOSAL

Please find attached a revised proposal, based on yesterday's discussion. I have included sub bullet points to highlight answers to questions, and extra items you wanted included.

Please let me know if you have addition comments or suggestions.

Yours sincerely,

David Beurle, CEO
Future iQ, Inc.
Tel: 612-757-9190
Email: david@future-iq.com

1.0 Approach and/or Methodology

1.1 Phase 1: Initial Planning and Research

This project will begin with meetings between Future iQ team members and Sugar Land staff to establish a final **project plan and schedule** that provides a detailed explanation of the overall project design and more clearly defines roles, tasks, timelines, and responsibilities throughout the life of the project. Additionally, the project’s **Stakeholder Engagement Plan** will be a detailed plan outlining the specific stakeholder engagement activities to occur throughout the project. The Engagement Plan for this project will be flexible and tailored to fit the broad needs of Sugar Land’s internal and external stakeholders.

Specific work in this phase includes:

- **Create online project portal and project branding** - During Phase 1, Future iQ will create a unique [project portal](#). The project portal serves as a central location where stakeholders can go to find updated project information, take surveys, view survey results and data visualization, reports, and notices. The portal is a critical piece of the project’s transparent communications plan.
- **Review of existing plans and surveys** - Future iQ will conduct background research and initial assessments consisting of a thorough review of existing data and materials. This review will help project team members to build a firm understanding of existing accomplishments, vision, values, and organizational priorities of Sugar Land.
 - *This work will include creating an organization map of the various plans and planning efforts and how they connect (including comprehensive plan, master plans and strategic plan). In addition, some shared vocabulary / definitions will be developed to help ensure clear communication and descriptions.*
- **Situational analysis and future readiness assessment** - Explore emerging trends and implications for the current city environment. Assess the current plans in terms of adaptability and future resilience.
- **Benchmark with comparable peer communities** – A longitudinal and comparative study to explore performance in a range of jointly identified peer cities.
 - *The selection criteria, peer communities, and topics of analysis will be collaboratively developed with the City project team.*

DELIVERABLES:

- **Project portal and branding**
- **Review of key issues / insights in current plans and surveys (research and insights)**
- **Situational analysis – exploring relevant future trends (future readiness analysis summary report)**
- **Benchmark Study**

1.2 Phase 2: Stakeholder Engagement

The stakeholder engagement phase will include in-person and virtual engagement.

- **Key Stakeholder interviews** - The project team will begin Phase 2 with key stakeholder interviews to gather insights and thoughts on the current conditions and the future for Sugar Land. This is intended to provide background information for the project team, and to promote the organizational vision and strategic planning process. This will help ensure 'buy in' on the strategic planning process from the start.
- **Targeted key stakeholder survey** - The project team will launch the Stakeholder Survey #1 that will analyze stakeholder sentiment and appetite for change and future readiness.
 - *This survey will focus on staff and Boards and Commissions. It will aim to fill some gaps in the existing community surveys and explore future readiness and potential vulnerabilities.*
- **Data visualization on portal** - The results of the survey will be posted on the project portal using a data visualization platform.
- **Staff briefing sessions – Q&A and input** – To maximize the staff input, a series of staff sessions will be hosted, to allow staff (and Boards and Commissions) an update on the process, insights from Phase 1, update on the survey, and overview of the Think-Tank.
- **Sugar Land Think-Tank Workshop** - Future iQ specializes in studying and understanding larger emergent trends and influences that are re-shaping urban areas. This future-oriented lens guides Phase 2 as it creates the building blocks of the strategic plan for Sugar Land using a scenario-based planning methodology. The methodology will lead to the clarification of a preferred vision and preliminary strategic action areas for the organization that will serve as the foundation for the Sugar Land Strategic Action Plan. The Think-Tank Workshop is a two-session workshop usually facilitated over the course of two days.
- **Sugar Land Think-Tank Report** - The results from the survey and Think-Tank will be compiled in the Sugar Land Think-Tank Report and posted on the project portal.

DELIVERABLES:

- **Key stakeholder insights and analysis.**
- **Targeted survey and results using data visualization.**
- **Staff briefing sessions.**
- **Think-Tank workshop and report.**

1.3 Phase 3: Plan Development

The plan development phase included the creating of actions and drafting the action plan and implementation framework.

- **Focus Groups to develop strategic actions and pillars** – The Future iQ team will conduct Focus Groups with specified stakeholder groups to build out the Strategic Pillars of the Strategic Action Plan. These Focus Groups will explore the goals and actions needed to get to the preferred future for the organization. The project team will develop action plans for each of the Strategic Pillars in the new Strategic Action Plan.
- **Draft the Sugar Land Strategic Action Plan** - After the development of the Strategic Pillars and Action Areas at the Focus Groups, Future iQ team members will work closely with Sugar Land staff to craft a detailed framework for the Strategic Action Plan including a timeline with responsible parties and a system for ongoing monitoring and reporting. This will involve careful synthesis of all research, engagement results, surveys, reports and analyses.
- **Validation and staff updates** – there are two rounds of additional validation (with community) and briefing / input session with the broader staff team.

DELIVERABLES:

- **Strategic Pillar framework and actions**
- **Draft Strategic Action Plan**
- **Validation and staff updates**

1.4 Phase 4: Final Plan and Presentation

The final steps in the strategic planning process will involve incorporating the input from Sugar Land leadership and staff.

- **Conduct Council Retreat session** – This will be an interactive session to allow Council to understand and inform the strategic action plan development.
- **Build prioritization / decision making tool and survey** – This survey tool will allow key staff, leadership and other selected stakeholders to help identify priority actions.
- **Final Sugar Land Strategic Action Plan** – This will be a comprehensive actionable strategic plan that includes recommendations for implementation and support structure, as well as how the proposed strategies best resolve strategic issues and allow the City Council to meet goals and preserve the community’s values. The Project Director will present the final Sugar Land Strategic Action Plan to the City Council for adoption.
 - *This plan will include insights on how the city can effectively use the various planning documents and how they interact with each other for better performance management. (i.e. strategic plan informs the budget). Recommends will include ideas on the process for utilizing these planning documents to develop the 5-year capital improvement program and the annual budget.*

DELIVERABLES:

- **Conduct Council retreat session**
- **Build prioritization / decision making tool and survey**
- **Final Strategic Action Plan**

2.0 Project Timeline – Transition Plan

The following chart outlines key tasks and timeline for this project’s transition plan.

Key Phases	Key Deliverables	J	A	S	O	N	D
Phase 1: Initial Planning and Research (July / August)	Create online project portal; project branding	■					
	Review of existing plans and surveys	■					
	Situational analysis and future readiness assessment	■	■				
	Benchmark with comparable peer communities	■	■				
Phase 2: Stakeholder Engagement (August / Sept)	Key stakeholder interviews – in person and virtual		■				
	Targeted key stakeholder survey		■				
	Data visualization on portal		■	■			
	Staff briefing sessions - Q&A and input		■	■			
	Sugar Land Think-Tank workshop			■			
	Sugar Land Think-Tank report			■			
Phase 3: Plan Development (Oct / Nov)	Focus Groups to develop strategic actions / pillars			■	■		
	Validate with community-based reference groups				■	■	
	Draft Strategic Action Plan + implementation plan				■	■	
	Briefing / input sessions with department groups					■	
Phase 4: Final Plan and Presentation	City Council Workshop at November retreat					■	
	Prioritization / decision making tool survey					■	■
	Feedback and input incorporated					■	■
	Final presentation and report						■
Ongoing	Weekly meetings with client liaison	■	■	■	■	■	■
	Project portal updates	■	■	■	■	■	■
	Detailed work plan	■	■	■	■	■	■

3.0 Proposed Budget

Future iQ offers a fixed price approach, inclusive of all travel and accommodation expenses. Core tasks are listed, together with some optional items for consideration.

Key Phases	Key Deliverables	Tasks
Phase 1: Initial Planning and Research (July / August)	Create online project portal; project branding	\$5,000
	Review of existing plans and surveys	\$5,000
	Situational analysis and future readiness assessment	\$15,000
	Benchmark with comparable peer communities	\$7,500
Phase 2: Stakeholder Engagement (August / Sept)	Key stakeholder interviews – in person and virtual	\$5,000
	Targeted key stakeholder survey	\$2,500
	Data visualization on portal	\$2,500
	Staff briefing sessions - Q&A and input	\$5,000
	Sugar Land Think-Tank workshop	\$15,000
	Sugar Land Think-Tank report	\$5,000
Phase 3: Plan Development (Oct / Nov)	Focus Groups to develop strategic actions / pillars	\$25,000
	Validate with community-based reference groups	\$5,000
	Draft Strategic Action Plan + implementation plan	\$10,000
	Briefing / input sessions with department groups	\$7,500
Phase 4: Final Plan and Presentation (Nov / Dec)	City Council Workshop at November retreat	\$5,000
	Prioritization / Decision making tool survey	\$2,500
	Feedback and input incorporated	\$2,500
	Final presentation and report	\$5,000
TOTAL		\$130,000

Includes ongoing project management work, including weekly meetings with client liaison, project portal updates and management to a detailed work plan

Proposed Payment schedule:

- 25% on signing of contract
- 25% at the completion of phases 2,3 and 4