

CITY OF TRAVERSE CITY, MICHIGAN
RFP FOR STRATEGIC PLANNING SERVICES

FEBRUARY 22, 2024
PROPOSAL



future→iQ

Create Future Intelligence™



Submitted by:
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February 22, 2024

City Manager's Office
Attn: Kim Sheridan
Executive Assistant to the City Manager
400 Boardman Avenue
Traverse City, MI 49684

RE: RFP for Strategic Planning Services

Dear Ms. Sheridan,

Future iQ is pleased to submit this proposal to serve as the consultant team to facilitate the development of Traverse City's Strategic Action Plan.

Our project team delivers personal, innovative, inclusive, and customized projects. Our hands-on approach, as well as the effectiveness of our methodology, will assist Traverse City's stakeholders to achieve an ambitious, realistic and actionable strategic plan. We ensure the planning process and project deliverables are forward-looking, people-focused, customized, and of the highest quality. Our goal is to produce original insight, and an agreed-upon, defensible roadmap for the city's future.

Future iQ has a strong track record of designing and implementing visioning and strategic planning projects across North America, Europe and Australia. We recently completed the visioning and strategic planning process for the City of Romulus in Michigan and are currently developing the Strategic Action Plan for Lorain County in Ohio, and the Town of Essex Junction in Vermont.

Some of the strengths we believe we bring to this project include:

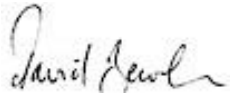
- **Scenario-based visioning and strategic planning** – Future iQ's Think-Tank uses a [scenario-based visioning and strategic planning](#) approach. This people-focused, inclusive, highly interactive workshop fosters deep discussions and collaboration around an aligned vision for the future. The process allows participants to acquire an understanding of the potential and implications of various decisions about the future for their community or organization.
- **Strong stakeholder engagement capabilities** – [Community and Stakeholder engagement](#) are a cornerstones of Future iQ's strategic planning methodology. Our planning process specializes in applying innovative tools and approaches that bring together stakeholders to create collaborative and cohesive plans, and an aligned vision

for the future. Importantly, our people-focused engagement process provides a collaborative place for participants to share expertise and ideas, and to openly consider various perspectives on issues importance.

- **Future orientation** – Future iQ specializes in studying and understanding larger emergent trends and influences that are re-shaping cities, towns, counties, organizations, industries and regions. This experience and knowledge help us shape truly future oriented planning processes for our clients as they consider future direction for their community.
- **The importance and power of good data.** Future iQ specializes in sophisticated data collection and analysis. We believe that good stakeholder engagement processes and data collection, presented in a transparent and interactive manner, can help build rapid alignment around key points of consensus.

It would be our privilege to work with the City of Traverse City stakeholders on this initiative. Please contact me for clarifications. Thank you for your consideration.

Yours sincerely,



David Beurle, CEO

Future iQ, Inc.

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1.0 Firm Overview

[Future iQ](#) is a small, privately owned global research and consulting company headquartered in Minneapolis, Minnesota. Founded in 2003, Future iQ's global footprint brings a broad perspective and delivers transformational customized solutions to our clients. With nine staff members and four strategic partners, Future iQ's clients span North America, Europe, and Australia. Please click on the links in the Snapshot to explore Future iQ's specializations.

Snapshot of Future iQ

Expertise

- [City and Urban Planning](#)
- [Regional Planning](#)
- [Organizational and Corporate Planning](#)
- [Tourism Destination Development](#)
- [Economic and Workforce Development](#)
- [Defense Sector Engagement](#)
- [Industry Planning and Analysis](#)

Methodology

- [Scenario-Based Strategic Planning and Visioning](#)
- [Stakeholder and Community Engagement](#)
- [Data Visualization](#)
- [Customized Foresight Research](#)
- [Future iQ Creative](#)
- [FutureiQ Mapper – Network & Supply Chain Mapping](#)
- [The Future Game](#)

Foresight Research

- [Cities of the Future](#)
- [Future of Urban Living](#)
- [The Future of Food](#)
- [Future of Tourism](#)
- [The Next Industrial Revolution](#)
- [Future of Manufacturing](#)

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

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1.1 Strategic Planning Experience with Municipalities

Relevant to this project, Future iQ has significant experience in visioning and strategic planning, complex organizational, economic development, municipal and regional planning. This project will explore complex issues to develop a forward-thinking strategic plan that unifies, strengthens, and advocates for Traverse City in new ways. Examples of our [project reports](#) and various [foresight research reports](#) can be found on the [Future iQ website](#) and on Future iQ's stakeholder [Research Laboratory](#).

Highlight Work Examples

- **City of Romulus, MI** [Community Vision and Action Plan](#)
Romulus is a diverse community situated around the Detroit Metropolitan Airport. Recently completed, this community-wide effort brought the community together through extensive engagement methods to identify a realistic vision for the future of the City. The intention of the process was to create a unified Community Vision plan that would inform decision-making on planning, land use, and policy making for the City.
- **City of Smithville, MO** [Comprehensive Plan](#)
Facilitated by Future iQ and JS&A, this original comprehensive planning project was built on the community's [visioning and strategic planning](#) process that Future iQ also facilitated. The plan involved the strategic economic development of unique character areas and StoryMaps of each identified area of the City. The strategic pillars that emerged from the original strategic planning process were instrumental building blocks of the Comprehensive Plan. Two areas for further study that emerged from the comprehensive planning process were the need for a [Parks and Recreation Master Plan](#), as well as a [Transportation Master Plan](#).
- **Lorain County, OH** [Loraine County Strategic Action Plan](#)
The Traverse City Board of Commissioners has embarked on a comprehensive and sustainable 5-year Strategic Action Plan for the County. The objective of this current strategic planning project is to build on Traverse City's current success and incorporate new actions to maintain and enhance this success over the next 5 years.
- **City of Essex Junction, VT** [Vision and Strategic Action Plan](#)
Future iQ is currently facilitating this visioning and strategic planning project. The visioning will include transparent, deep and robust community engagement that will lead into the strategic planning process. The Strategic Action Plan will define priorities and guide decision making over the next five years.
- **City of Edina, MN** [Vision Edina](#) and [Nodes and Modes Bridging to Comprehensive Plan](#)
After facilitating the Edina's strategic visioning process, Future iQ led a bridging planning process that coupled together neighborhood development with multimodal transport connections. The concept guided the city's comprehensive planning process as the community sought to enhance the city's characteristics and community fabric, while at the same time embracing urban renewal and targeted redevelopment.

- **City of Littleton, CO** [Comprehensive Economic Development Strategic Plan](#)
This current project aims to position the City of Littleton on a continued path of an economically diverse, resilient, and vibrant economy that allows people of all backgrounds to live work, play, and visit. The resulting CEDS Plan will become the guiding document for the City’s economic development priorities and programs over the next 10 years.
- **City of Moab, UT** [Moab – Tomorrow Together](#)
Future iQ recently completed the community visioning and strategic planning for the City of Moab. The results of this process set the framework for future land use, economic, social and environmental decisions. A key goal of this process was to help the community articulate tangible and intangible elements that, if lost, would fundamentally change the character of Moab.
- **Park City, UT** [Community Vision and Action Plan](#)
The visioning and strategic action planning for this project engaged approximately 1,700 people in a series of surveys, engagement sessions, focus groups and two key Future Summits. The process was designed to provide an open, inclusive and transparent platform for community members to help create a shared vision and board action plan for Park City.
- **Town of Falmouth, ME** [Vision and Values](#) The community of Falmouth developed a Town Vision and Values statement through a robust visioning process prior to embarking on the update of its latest Comprehensive Plan. The engagement process was designed to provide an open, inclusive, and transparent platform for community members to help create a shared community vision and values for the future.
- **City of San Diego, CA** [Regional Economic Development Planning](#)
This area is home to the largest concentration of military assets in the world. The Future iQ work included the facilitation of Regional Leadership Group meetings, network mapping, economic data collection and analysis, scenario planning and visioning, stakeholder engagement and the production of the Propel San Diego Strategic Roadmap.
- **City of Mitchell, SD** [Community Vision and Strategic Action Plan](#)
The Forward 2040 project brought the community together with a large-scale visioning and strategic planning process to meet the future challenges facing the community. The work was built on open and transparent public participation and thoughtful and constructive dialogue. The final plan includes a strategic roadmap for community decision-making looking out to 2040.

1.2 Work with Diverse Communities

Future iQ offers a team with a wide range of diverse backgrounds and deep cultural sensitivities. We offer multi-lingual capability, with team members fluent in five primary languages. We have deep experience in working in racially and ethnically diverse communities and regions in the United States. Our team reflects this diversity, and includes a range of generational, gender, and racial backgrounds. We understand this importance to communities and the engagement experience, to reflect and include all stakeholders' voices in the strategic planning process. Below are examples of our work with diverse communities and underrepresented groups.

- **Unified Government of Wyandotte County-Kansas City, KS** [Economic Development Strategy](#) This recent project is helping to lead Kansas City into the future with inventive thinking, new ideas, economic strategic tools and approaches, and implementable policies and action plans. The resulting Economic Development Strategic Plan aims to bolster all neighborhoods and engender economic prosperity in an equitable manner.
- **City of Trotwood, OH** [Organizational Strategic Plan](#) The City of Trotwood is a diverse community that is majority African American. Future iQ worked closely with stakeholders to create a vision and organizational strategic plan that reflected the vision and values of all community members. Future iQ is currently working with the City of Trotwood on a [Communications Strategy](#) for the City.
- **Town of Hilton Head Island, SC** [Vision and Strategic Action Plan](#) Hilton Head Island is a diverse community with rich historic relevance. The vision and strategic action plan incorporated this significance and recognized the unique importance of the 'native islander' Gullah culture and people in the community.
- **University City, MO** [Community Vision and Strategic Roadmap](#) Future iQ recently completed the community visioning and planning for University City, a diverse community with significant economic disparities. Led by a Task Force comprised solely of community members, the roadmap that emerged from this process celebrated the rich diversity of the community and incorporated this strength into its vision for the future.
- **City of Coppell, TX** [Community Vision and Strategic Action Plan](#) Coppell is a community that has a growing Asian population, currently almost a third of the population. Future iQ worked closely with stakeholders to create a vision and action plan that was welcoming and inclusive of all new community members.
- **National Congress of American Indians (NCAI), DC** [The Future Game](#) Founded in 1944, NCAI is the oldest, largest, and most representative American Indian and Alaska Native organization serving the broad interest of tribal governments and communities in the US. Future iQ created a unique version of the Future Game build around the interface and engagement between researchers, Native American communities, and leaders.

1.3 Additional Relevant Strategic Planning Experience

The majority of Future iQ's experience is working with public agencies and municipalities in the United States. Our national reach enables us to provide clients with insights from cities, counties, towns and organizations in both urban and rural areas. We specialize in visioning and strategic planning and provide highly customized plans that are tailored to each of our clients. Below are additional examples of Future iQ's strategic planning projects. Work products and project summaries are available in the embedded links below.

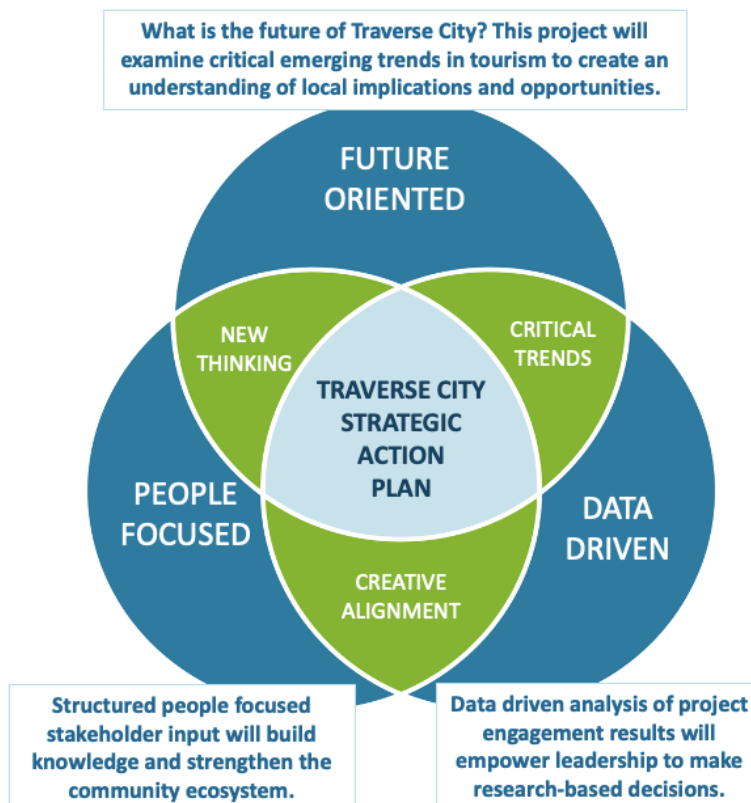
- B.E.S.T. of Waseca County, MN [Community Vision and Strategic Action Plan](#)
- Keene, NH [Comprehensive Master Plan](#)
- Wayzata, MN [Wayzata 2040 Community Vision](#)
- State of Vermont, VT [Vermont Forest Future Strategic Roadmap](#)
- Flint Hills Regional Council, KS [Sustainability Plan and Roadmap](#)
- Greater Mankato 2040, MN [Regional visioning project](#)
- Envision East Central Iowa [Comprehensive Economic Development Strategy \(CEDS\)](#)
- Middle Georgia [Creating an Innovation Corridor](#)
- New England Regional Defense Industry Collaboration [NERDIC](#)
- Greater Bemidji, MN [Strategic Action Plan Update](#)
- Council of State Community Development Agencies (COSFDA), DC [Strategic Action Plan](#)
- National Association of Development Organizations (NADO), DC [Strategic Action Plan](#)
- New Hampshire Aerospace and Defense Consortium (NHADEC), DC [Strategic Action Plan](#)
- Smithville School District, MO [Organizational Strategic Plan](#)
- Greater Lima Region, OH [Collaborative Action Plan](#)
- WI Dept. of Military Affairs, WI [Madison F35 Community Connection](#)
- New North Inc., WI [Business Intelligence Strategic Planning](#)
- East Central WI Regional Planning Commission, WI [Fox Valley Regional Planning](#)
- Kewaunee County, WI [Regional Planning](#)
- Oshkosh Initiative, WI [Regional Collaborative Action Plan](#)
- Iowa Department of Natural Resources, IA [Strategic Vision for Iowa](#)
- Tillamook County, OR [Tourism Investment Strategic Vision Action Plan](#)
- Moosehead Lake Region, ME, [Regional Vision and Strategic Action Plan](#)
- Snohomish County, WA [Regional Destination Visioning and Planning](#)
- Denton, TX [Comprehensive Solid Waste Management Strategy](#)
- San Diego, CA, [Regional Defense Industry Vision and Strategic Roadmap](#)
- Oshkosh Initiative, WI [Regional Collaborative Action Plan](#)
- Italy and France, Strategic Planning [Mediterranean Ports Project](#)

2.0 Methodology

2.1 Customized Methodology - Overview

Future iQ brings a global perspective to strategic planning that is invaluable to local interests. For Traverse City, this means access to a wealth of knowledge and experience in visioning and strategic planning for towns, cities, counties, regions, and nonprofits. Future iQ will use this experience to guide and inform this project and will work with city leadership, staff, and the community to develop comprehensive, future-oriented, sustainable, and implementable goals and actions to support the new Traverse City Strategic Action Plan. These actions will balance priorities across the important dimensions specific to Traverse City and incorporate innovative global and local best practices. Future iQ's strategic planning methodology is based on three primary principles:

- A **'future orientation' principle** is particularly important to take account of rapidly emerging environmental, technological, and societal trends.
- The **'data driven' principle** ensures the plan is built on solid research and information. Presentation of the quantitative survey and Think-Tank findings are presented using data visualization platform where results can be filtered and viewed in a myriad of ways.
- The **'people focused' principle** is important to build support for the vision and goals, and to harness the best possible input into actionable plan formulation.

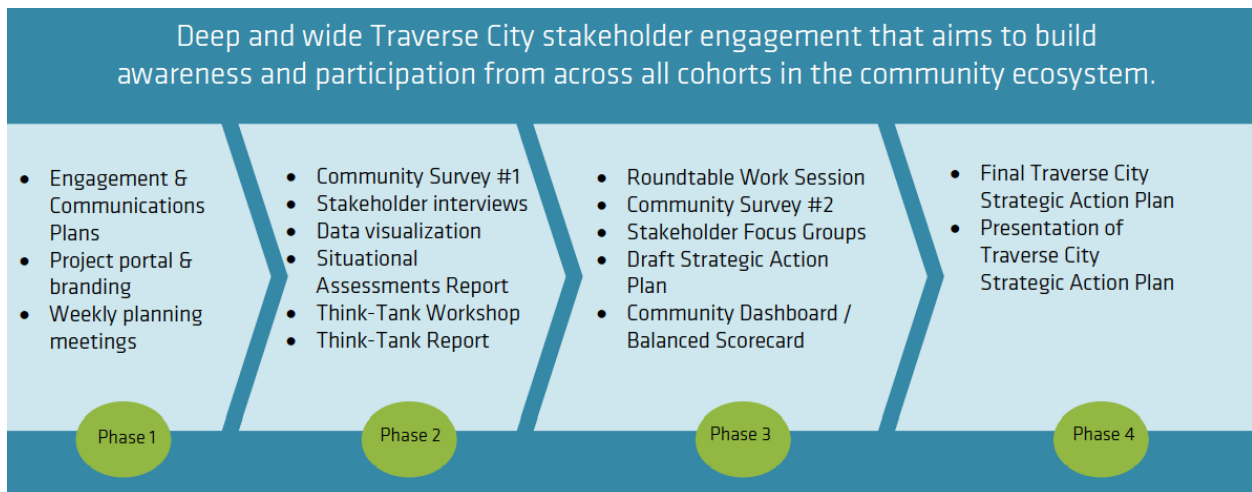


2.1.1 Stakeholder Engagement Plan

[Engagement](#) and transparent communication are cornerstones of Future iQ’s strategic planning methodology. Our firm has facilitated strategic planning projects for over 20 years on a global scale, and has led the development of several innovative engagement tools and techniques such as [scenario-planning](#), [data visualization](#), [customized foresight research](#), and [The Future Game](#). We have used our methodologies across multiple settings and have built a reputation for a hands-on, people-focused, and highly customized approach to our projects.

The **Stakeholder Engagement Plan** for this project will be tailored and highly customized to fit the unique needs of Traverse City. Future iQ will ensure the strategic planning process is open and accessible to stakeholders, and that multiple opportunities exist to provide input in a variety of formats. This variety of approaches will ensure engagement with and participation by a broad and deep cross section of the city’s community members and stakeholders, including those who don’t usually participate in the civic process.

Below is a schematic of the engagement activities that will be included with this project. Additional methodologies may be added throughout the project as needed.



The following two sections outline and highlight the broad range of Future iQ’s successful engagement methodologies and approaches.

PEOPLE-FOCUSED, HANDS-ON ENGAGEMENT METHODOLOGIES

Future iQ maintains a range of innovative proprietary project engagement methodologies. We tailor the methodologies used to the unique needs of each of our clients.

Methodology	Description	Project Examples
Community and Stakeholder Surveys	Surveys typically gather quantitative and qualitative data that is used to drive our stakeholder data-visualization. Surveys are offered in Spanish and English, hard copy, and digital formats to reach as many cohorts as possible.	<ul style="list-style-type: none"> • VT Future Forests Stakeholder Survey • Falmouth, ME Community Survey • Littleton, CO Spanish and English Stakeholder Surveys
Listening Sessions & Interviews	These important initial public engagement interactions gather stakeholder input on concerns and aspirations for the future of communities or organizations. Virtual and in-person listening session allow exploration of local issues and concerns.	<ul style="list-style-type: none"> • University City Community Vision 2040 Listening Sessions • Middle Georgia Innovation Project – stakeholder interviews
Project Portal & Discussion Boards	Project Portals are the ‘go to’ place for stakeholders to find project information. Discussion Boards are a moderated on-line discussion methodology. These are effective for more complex discussions on topics to creatively explore ideas and issues.	<ul style="list-style-type: none"> • Future iQ Project Portals • Romulus, MI Project Portal • Smithville, MO Comprehensive Plan Discussion Boards
Future Game	The Future Game is a unique future planning simulation tool that rewards collaboration, innovation and teamwork. Playing the game allows stakeholders to apply the learning from the game to their own decision making and planning.	<ul style="list-style-type: none"> • National Congress of American Indians Future Game
Data Visualization	Future iQ’s data visualization of survey data on the project portal provides a fun and interactive way to give transparent feedback to stakeholders while at the same time exploring issues of importance.	<ul style="list-style-type: none"> • Greater Mankato 2040 Data Visualization • Envision East Central Iowa Data Visualization
Think-Tank	Think-Tanks are a scenario-based strategic planning methodology. This is very powerful way to create plausible futures and explore concepts of Preferred and Expected Futures. Typically, 50-150 people take a deep dive into future exploration.	<ul style="list-style-type: none"> • Trotwood, OH Think-Tank • Romulus, MI Think-Tank • University City, MO Think-Tank • Moab, UT Think-Tank
Vision/Strategy Workshops	Community or Stakeholder Vision and Strategy Workshops take place after the scenario-development at the Think-Tank. The aim of these workshops is to build a deeper understanding of the preferred future and to gather wide input on preliminary strategies.	<ul style="list-style-type: none"> • Coppell Vision 2040 Community Visioning Workshops • Smithville, MO Community Visioning Workshops
Focus Groups	Future iQ developed a Focus Group methodology that is used to build out the detail of the strategic pillars that are the foundation of a community vision. These are smaller, topic-dedicated expert groups.	<ul style="list-style-type: none"> • Falmouth Vision and Values Focus Groups • The Future of Wellbeing Focus Group summaries
Future Summits	Future Summits are large scale stakeholder events, that are often capstone events to present project results. Future iQ also utilizes rapid polling and final survey work to gather stakeholder input at these events.	<ul style="list-style-type: none"> • Park City Vision 2020 to review results and to prioritize actions • Envision East Central Iowa Future Summit executive summary

PEOPLE-FOCUSED ENGAGEMENT APPROACHES TO STAKEHOLDER COHORTS

Future iQ's people-focused engagement is welcoming and inclusive of all stakeholder cohorts. We strive to include those who don't usually participate in the public process.

Cohort	Approach	Project Examples
Youth	Future iQ strongly supports incorporating the youth voice into visioning and planning processes. We work with high school and university cohorts, recreation groups, and plenary sessions with 500+ students.	<ul style="list-style-type: none"> Smithville, MO Youth sessions Mitchell, SD Youth Sessions & Survey
Seniors	Populations are aging in many communities and as a result, Seniors are an important demographic impacting infrastructural and programmatic community needs. Future iQ seeks out Senior input at living places, Senior Centers, faith centers, Homeowner Associations, etc.	<ul style="list-style-type: none"> Park City, UT Senior Center Wayzata, MN Engagement Hilton Head Island, SC Engagement
Minority Groups	Significant barriers exist that prevent underrepresented groups from participating in civic processes. Future iQ breaks down these barriers by translating materials and going to gathering places such as faith places, workplaces, multi-cultural and community centers, and community eating places.	<ul style="list-style-type: none"> Moab, UT Spanish Speaking Community Park City, UT Latinos in Action Coppell, TX Community Fabric UG Wyandotte County-KCK Vision Summit
Business and Industry	Planning for economic development requires the input from business and industries. Future iQ gathers this important input by facilitating online and in-person focus groups at individual businesses, chambers of commerce, rotary, industry and trade associations events.	<ul style="list-style-type: none"> VT Forests Industry Roundtables Middle Georgia Charrette Process IMEC Stakeholder Group Sessions IDNR Industry Focus Group Survey NERDIC Industry 4.0 Readiness
Working Parents	Future iQ recognizes that working parents are a cohort that is stretched thin with responsibilities. We hold project activities in suitable timeslots, and particularly in the evenings to accommodate this cohort. We also reach out through PTOs, school newsletters, and events.	<ul style="list-style-type: none"> University City, MO Evening Sessions Waseca, MN Engagement Sessions
Young Professionals	We understand that young professionals have very little time for extra activities in their lives. Future iQ goes directly to this cohort through young professional organizations, networking, and training events.	<ul style="list-style-type: none"> Middle Georgia Engagement Moab, UT Young Professionals Wayzata, MN Engagement
Officials and Community Leaders	Elected officials and community leaders are critical advisors to any project. Future iQ provides information to this cohort through Council briefings and gathers input at City-sponsored and project events, professional conferences, and speaking opportunities.	<ul style="list-style-type: none"> Trotwood, OH Fostering Leadership NADO Training Conference VT Future Forests Industry Roundtables
General Public	Future iQ provides transparency and multiple avenues for input from the public. We do this through means such as emails, social media, newsletters, open forums, Town Hall meetings, workshops at community centers and libraries.	<ul style="list-style-type: none"> University City, MO Community Centers Mitchell, SD Community Sessions Falmouth, ME Online Summits

2.1.2 Scenario-Based Think-Tank Methodology

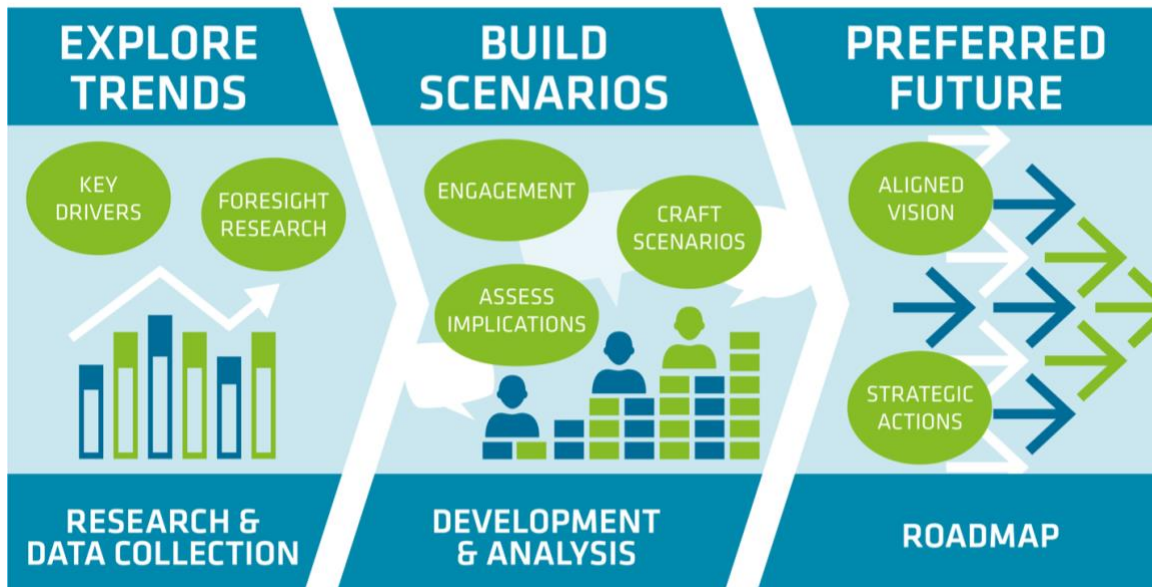
Future iQ uses a [scenario planning](#) approach to strategic planning, with a dedicated Think-Tank workshop. The Think-Tank creates scenarios that are not predictions but will, through the Think-Tank process, produce four plausible futures for Traverse City. Key aspects and features of the approach include:

- The Think-Tank results will be instrumental to the end of the project. The process is inclusive, easily scalable, and can draw input from all cohorts of Traverse City's organizational and community ecosystems.
- It is front loaded with a presentation of key future trends that relate to Traverse City and the results from the Community Survey.
- Participants discuss the key drivers that are important to Traverse City's strategic planning process. These key drivers are then ranked with the Think-Tank participants relating to importance and urgency.
- The Scenario Matrix is developed by Future iQ from the first part of the Think-Tank.
- Four plausible scenarios are developed and developed in the later stages of the Think-Tank. This allows stakeholders to visualize different possible futures for Traverse City.
- Scenario names and descriptions are described by the Think-Tank participants.
- The expected, preferred, and least desired futures are produced and uploaded to the Traverse City project portal.
- The scenario-planning process illustrates the interconnectedness of planning processes and encourages more holistic planning.
- The journey from the expected future to the preferred future is then pursued by building out the steps to get there.

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

- **Strong collaborative and inclusive people-focused approach.** The long-term success of this project will be dependent on building strong collaboration among Traverse 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 will be critical for Traverse City. To develop an agreed upon vision and plan, community members and stakeholders will need clarity and a common understanding of the drivers impacting the city.
- **Data driven approach, including data visualization.** Our experience suggests that projects like this are most successful when built on transparent data driven approaches, inclusive of as many community member and stakeholder voices as possible.
- **Project management and communication strategy.** Building the systems and communication methods to ensure compliance and timely delivery are important features of our project management.

Below is the visual outline of how Future iQ’s [scenario-based strategic planning](#) process works.



For Traverse City, the Think-Tank process can further examine circumstances including:

- What makes Traverse City unique and how can the city use these characteristics to prepare for the future?
- How will stakeholder preferences fit into this vision and how will their evolving demographics be incorporated into the new vision?
- How should funds be invested and leveraged to build resiliency for the city?
- How does Traverse City fit into the larger statewide ecosystem?
- What are the specific strategic gap and growth areas for Traverse City and does previous planning address those areas?
- How may financial/budgetary issues on the state level impact Traverse City and how can the city prepare for potential budget challenges?
- What unique hurdles might the city face, and how do we build collaborative approaches and structures to ensure continued successful programs and services for its community members and stakeholders?
- 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 stakeholders want to tell, and what future do they want for Traverse City?

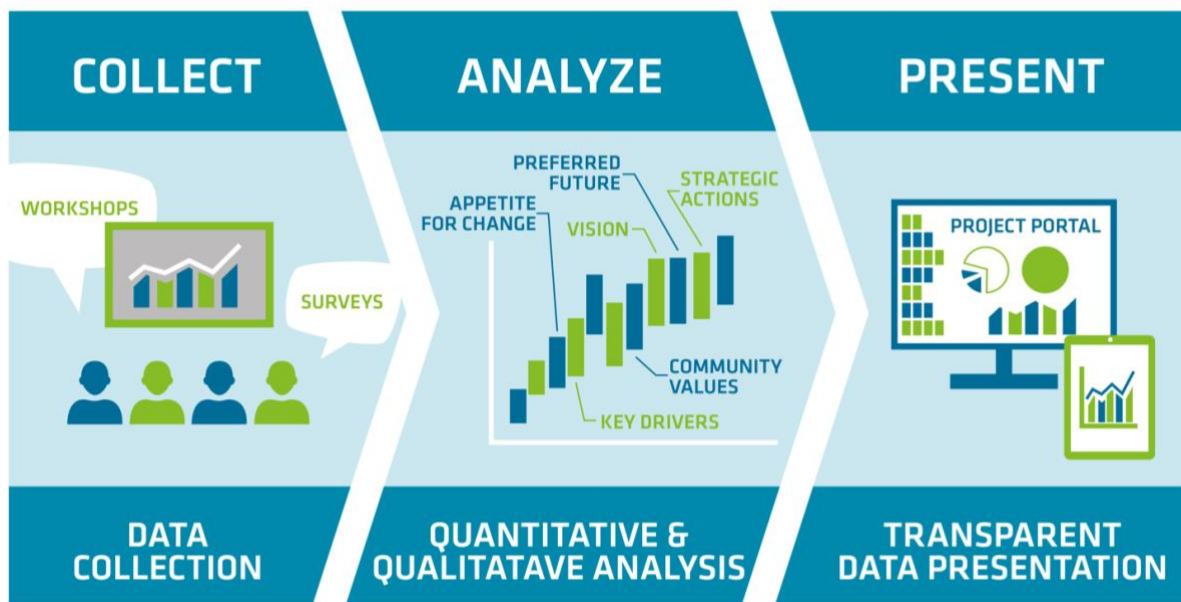
The methodology being proposed by Future iQ in this proposal is more in-depth than a SWOT analysis and will allow stakeholders to tackle these questions in an engaging and thought-provoking manner. Following the Think-Tank, Future iQ will compile survey and Think-Tank results into the **Traverse City Think-Tank Report**. This will then lead to the clarification of the emerging vision and strategic pillars that will serve as a foundation for the Traverse City Strategic Action Plan.

2.1.3 Data Visualization

Data collection and development from surveys provides an inclusive process and a comprehensive understanding of stakeholder views and where points of consensus lie. Future iQ will use an online Lab Portal to collect and display stakeholder survey results. For examples, please see <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 community and organizational ecosystems.



The strategic planning process for Traverse City includes surveys that will reach as many community members and stakeholders as possible. Future iQ's data visualization allows viewers to sort and filter the data by cohort group, revealing sentiments by cohort filters such as city affiliation, neighborhood, age, etc. The Lab also serves as a central location where stakeholders can go to find updated project information and notices.



Future iQ prioritizes ensuring our content, analysis, and findings are easy to understand and approachable for all audience types. This helps make sure that our engagement reaches a wide variety of stakeholders and conversations can dive deep regardless of participants familiarity on the topic. The strategic planning process is an important time for Traverse City. By leveraging data visualization and easy-to-follow content, we draw higher participation rates and more meaningful conversations.

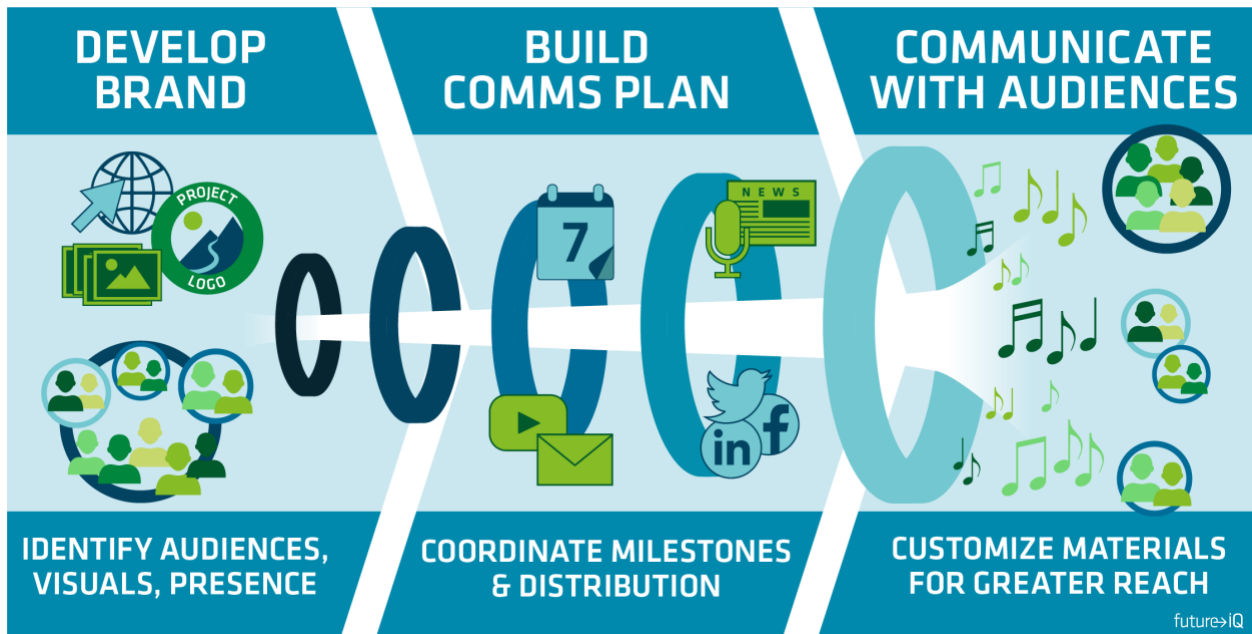
2.1.4 Communications Plan

Communications are integral parts of Future iQ’s methodologies. We take care to provide project information to stakeholders that is approachable, accurate, and sensitive to stakeholder concerns. Our communications involve both digital and traditional methods to include as broad an audience as possible. We work closely with our clients to maintain regular communications for the duration of the project. It is our experience that consistent and easily accessible project communications add to the transparency of the process and encourage active participation.



At the beginning of each project, the project team will build a project narrative and overall communications plan. We then establish an editorial calendar for social media posts, emails, ad copy, graphics, articles, videography, and any other assets that can be used by our clients. The social media schedule will be updated on a weekly basis for the weekly project call. Future iQ will also supply newsletter articles for any publication that goes out to the community and stakeholders, and press releases as needed.

A key part of our communications plan is the distribution of information via the associated customized project portal. The **project portal** serves as a central location where stakeholders can go to find updated project information, participate in discussion boards, take surveys, view survey results and data visualization, reports, and notices. The portal provides a fun and interactive way to give transparent feedback to participants while at the same time exploring issues and views across a community or organizational ecosystem. Visit lab2.future-iq.com for examples.



PEOPLE-FOCUSED, INCLUSIVE AND TRANSPARENT COMMUNICATION METHODOLOGIES

Future iQ provides a range of communications options that are accessible, accurate, and sensitive to local concerns. Our communications involve both digital and traditional methods to include as broad an audience as possible.

Methodology	Description	Project Examples
Project Branding	All project communications will include unique project branding created by Future iQ. This branding will be consistent with client branding and will unify all project activities, communications, and marketing efforts.	<ul style="list-style-type: none"> • Vermont Forest Future Portal • Littleton, CO Portal • Romulus, MI Portal • Greater Mankato, MN Portal • Moab, UT Portal
Project Portals	Every communication Future iQ releases directs back to the project portal. In addition to being a repository for project information, the portal homepage is updated with every project milestone. This “newsfeed” approach ensures the most pertinent and up to date information is in front of stakeholders in a timely manner.	<ul style="list-style-type: none"> • Future iQ Project Portals • Tillamook County, OR Portal • Falmouth, ME Project Portal • Greater Mankato, MN Portal • Smithville School District Project Portal
Project Materials	Future iQ produces customized hard copy and digitized materials for all our projects. Examples include posters, flyers, postcards, invitations and agendas, announcements, press releases, marketing materials, graphics, surveys, and reports. As needed, project materials can be provided in both English and Spanish.	<ul style="list-style-type: none"> • Future iQ Project Reports • Moab Tomorrow Together, UT Project Materials • Smithville Comp Plan, MO Character Area StoryMaps • Waseca, MN Project Materials
Media Relations	Existing media outlets such as newspapers, radio stations, and tv networks can be invaluable for spreading word about the project beyond planning team networks. Future iQ develops press releases, media packages, and additional materials as needed for each project.	<ul style="list-style-type: none"> • VT Future Forests Video • Middle Georgia Innovation Project Trailer • Future iQ Future of Wellbeing, MN Initiative Launch • Romulus, MI Press Release
E-Newsletters	Over the course of a project, stakeholder emails are gathered in online surveys, at events, and submitted on the project portal. Future iQ keeps in regular touch with project followers with E-newsletters containing updates, invitations, surveys, and other useful links.	<ul style="list-style-type: none"> • Future iQ Newsletters • Falmouth Vision & Values, ME Newsletters
Social Media	Social media is widely used tool that has the ability to grow both project awareness and engagement. Future iQ can create content for social media usage including post language and imagery, stakeholder quotes, and videos to harness that power.	<ul style="list-style-type: none"> • Greater Mankato 2040, MN Social Media Toolkit • Vision Romulus, ME Social Media & Communications • NERDIC Videos
Toolkits	Future iQ creates Communications Toolkits that community members and stakeholders can use on their own social media platforms to communicate about local events and projects. Kits can include logos, social media tiles, press releases, and more.	<ul style="list-style-type: none"> • Mankato Social Media and Communications Toolkit • Romulus Social Media and Communications Toolkit

CUSTOMIZED AND BRANDED PROJECT MATERIALS

Along with uniquely branded project logos, Future iQ produces customized materials for all of our projects. These include posters, flyers, postcards, invitations and announcements, agendas, press releases, marketing materials, graphics, surveys, and reports. Future iQ can also create toolkits for stakeholders to use to promote the project themselves. Project materials can be translated into Spanish by the translator on the project team and provided in both hard copy and digital versions.

Recent examples of project materials



2.2 Strategic Planning Process

The proposed project plan is implemented in four phases that build momentum around a 5-year strategic action plan for Traverse City. The shared vision and strategic plan are intended to be inclusive and sustainable. They will unify community members and stakeholders, build sustainability and resiliency, and align resources throughout the city. The scope of work outlined in the RFP will be included in the proposed project plan and incorporated into the four phases outlined below.

Proposed Project Plan



2.2.1 Phase 1: Initial Planning and Assessments

This project will begin with meetings between Future iQ team members and city 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 Traverse City’s many stakeholder groups.



The project team will begin **initial assessments and situational analysis** consisting of a thorough review of existing data and materials exploring impacting trends and current city environment and plans will be undertaken to understand those strategic directions already established and to identify progress made towards those objectives. This review will help project team members to build a firm understanding of accomplishments, goals, and priorities of the city.

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** that will include marketing, **unique project branding**, materials, and other methods (such as social media posts, articles, etc) necessary to increase recognition, build credibility and deepen understanding of the project’s engagement process, its objectives, and outcomes within the city. Communications will involve both digital and traditional methods to reach as broad an audience as possible.

In addition to weekly calls with the city’s client contact, Future iQ will meet monthly with the Steering Committee for the project. These important advisors will both help guide the engagement process and serve as ambassadors of the project to the community.

Deliverables from Phase 1 will include:

- Detailed work plan and schedule
- Create online project portal; project branding
- Engagement and Communications Plans
- Begin initial Assessments and Situational Analysis
- Strategic planning meetings

RFP requirements addressed by deliverables in Phase 1:

- Initial Assessments and Situation Analysis.
- Create and implement a comprehensive community engagement plan that includes strategies to reach historically overlooked populations.

2.2.2 Phase 2: Stakeholder Engagement

The project team will begin phase two with **key stakeholder interviews** to gather personal insights and thoughts on the current conditions and future for Traverse City. This is intended to provide background information for the project team, and to promote the city-wide strategic planning processes on the project portal. This will familiarize stakeholders with the project team and ensure ‘buy in’ on the strategic planning process from the start. The project team will also launch the **Community Survey #1** that will assess community needs, analyze stakeholder sentiment, and assess appetite for change and future readiness. The project team will work closely with city staff to distribute the survey as widely as possible and provide. The results of the survey will be posted on the project portal using a **data visualization platform**.



Future iQ specializes in studying and understanding larger emergent trends and influences that are re-shaping both rural and urban areas. This future-oriented lens guides phase two as it creates the building blocks of the vision for Traverse City using a scenario-based planning methodology. Using trend research, industry analysis, and expectations about city and regional drivers, this methodology will enable stakeholders to explore the impacts and consequences of a range of different future paths as they participate in a two-session in-person Traverse City **Think-Tank Workshop**. The methodology being proposed is more in-depth than a SWOT analysis and will lead to the clarification of a preferred vision and preliminary strategic action areas for the city that will serve as the foundation for the Traverse City Strategic Action Plan. The results from the survey and Think-Tank will be compiled in the **Traverse City Think-Tank Report** and posted on the project portal.

The **Situational Assessments Report** will also be completed in Phase 2.

Deliverables from Phase 2 will include:

- Community Survey #1
- Key stakeholder interviews
- Data visualization on project portal
- Complete Situational Assessments Report
- Traverse City Think-Tank Workshop
- Traverse City Think-Tank Report

RFP requirements and objectives addressed by deliverables in Phase 2:

- Conduct a statistically valid community survey.
- Conduct a SWOT analysis for the city.
- Complete the Assessments and Situational Analysis for the city.
- Begin to set the goals and Strategic Pillars for the Strategic Action Plan.

2.2.3 Phase 3: Plan Development

Following the Think-Tank, a second **Community Survey** will be administered to seek input on the proposed preferred future and strategic framework for Traverse City. Future iQ will also facilitate a **Roundtable Session** that will allow stakeholders to better define the strategic priorities that emerged from the Think-Tank.



Following the Roundtable Session, 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 city. The project team will develop action plans for each of the Strategic Pillars in the new Strategic Action Plan. Each Focus Group will be approximately 1 ½ - 2 hours in length.

After the development of the Strategic Pillars and Action Areas at the Focus Groups, Future iQ team members will work closely with city 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. Future iQ will produce a **draft the Traverse City Strategic Action Plan** and seek input from leadership and staff.

Measuring Effectiveness

Understanding and measuring progress in key performance areas will be an important part of implementing the Traverse City Strategic Action Plan. Used correctly, metrics provide a powerful feedback loop to understanding the effectiveness of resource development strategies and investment in programs and in identifying emerging gaps. Phase 3 of this project plan includes the development of measurements to support periodic review and adjustment of strategic action plan over time.

Deliverables for Phase 3 include:

- Roundtable Work Session to determine Strategic Pillars
- Community Survey #2
- Focus Groups with specified stakeholder groups to build out the Strategic Pillars
- Draft Traverse City Strategic Action Plan
- Community Dashboard/Balanced Scorecard

RFP requirements addressed by deliverables in Phase 3:

- Establish visionary Big Hairy Audacious Goals (BHAGs) for the city.
- Develop detailed action plans for each of the Strategic Pillars of the Strategic Action Plan.
- Establish a system for ongoing monitoring of key performance indicators.

2.2.4 Phase 4: Final Plan

Future iQ will incorporate input on the draft plan into a final version of the Strategic Action Plan. The project team will also produce a Community Dashboard/Balanced Scorecard to visualize the key performance metrics of the plan. As requested in the RFP, the final version of the Strategic Action Plan will recommend a cadence and framework for updates to the strategic plan.



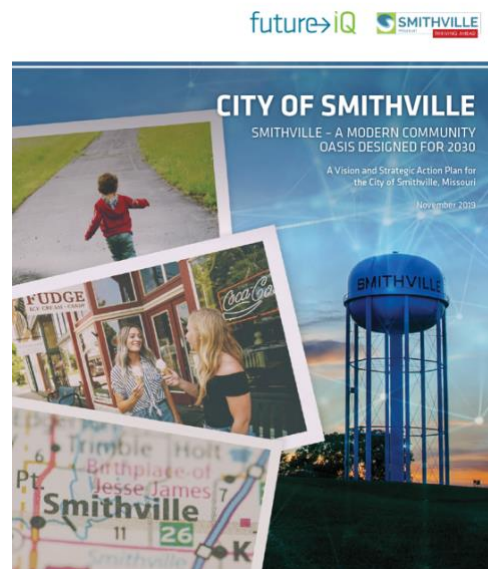
The final Traverse City Strategic Action Plan will also be presented by the Project Director at a meeting as arranged in the initial planning phase of the project.

Deliverables from Phase 4 include:

- Finalize Traverse City Strategic Action Plan; input incorporated
- Present final Traverse City Strategic Action Plan

RFP requirements addressed by deliverables in Phase 4:

- Develop and implement a community dashboard and a balanced scorecard to visualize key performance metrics.
- Provide a recommended cadence and framework for updates to the strategic plan.



3.0 Team Expertise

The client-facing Future iQ team members presented in this proposal have significant experience working on visioning and strategic planning projects in both rural and urban settings. 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/or virtually, 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 strategic planning, visioning, economic development, and foresight research
- Knowledge and experience with counties, towns, cities, state agencies, municipalities, corporations, regional entities, and non-profit organizations
- Project management, stakeholder engagement, and workshop facilitation
- Communications, graphic design, data visualization, and project branding

Project Director David Beurle will be the primary contact person for this project. Below are the respective team member roles for this project.

Team Member	Title	Role
David Beurle	CEO and Founder, Future iQ	Project Director, Facilitation, Strategy Development
Adam Bentley	Research Strategist	Research and strategy development
Celine Beurle	COO	Project coordination
Heather Branigin	VP, Foresight Research	Foresight research
Cheryl Wheeler	Community Engagement Specialist	Community engagement
Brittany Rempe	Creative Director	Graphic design and branding
Sonia Labanda	Translator	Spanish translation
Walter Paixao-Cortes	Data Engineer	Data Visualization

For complete project team resumes, please see Appendix A.

Proposed Team Members

Future iQ



DAVID BEURLE
CEO & Founder



ADAM BENTLEY
Research Strategist



CHERYL WHEELER
Community Engagement Specialist



CELINE BEURLE
Chief Operating Officer



BRITTANY REMPE
Creative Director



HEATHER BRANIGIN
VP - Foresight Research



WALTER R. PAIXÃO-CÔRTE
Data Engineer



SONIA LABANDA
Translator

4.0 Timeline

The following chart outlines key tasks and suggested periods of activities. This timeline reflects the relative emphasis of activity. Work on several the key deliverables will occur in parallel to allow the phases to be completed within this project timeline. We will work with city staff to create a timeline that incorporates the specific needs of the city and remains flexible over the course of the project. Please note that our team is able to begin this project earlier than August as needed.

Key Phases	Key Deliverables	A	S	O	N	D	J	F	M	A	M
Phase 1: Initial Planning & Assessments	Detailed work plan and schedule	■									
	Create online project portal; project branding	■	■								
	Engagement and Communication Plans	■	■								
	Initial Assessments and Situational Analysis	■	■								
	Strategic planning meetings	■	■	■	■	■	■	■	■	■	■
Phase 2: Stakeholder Engagement	Community Survey #1		■	■							
	Key stakeholder interviews		■	■							
	Data visualization on portal			■	■						
	Complete Situational Assessment Report			■	■						
	Traverse City Think-Tank Workshop				■	■					
	Traverse City Think-Tank Report				■	■					
Phase 3: Plan Development	Roundtable Work Session to determine Strategic Pillars					■	■				
	Community Survey #2						■	■			
	Focus Groups with specified stakeholder groups to develop Strategic Pillars						■	■			
	Draft and develop Traverse City Strategic Action Plan with Implementation Plan							■	■		
	Community Dashboard/Balanced Scorecard								■	■	
Phase 4: Final Plan	Finalize Traverse City Strategic Action Plan; input incorporated									■	■
	Present final Traverse City Strategic Action Plan										■
Ongoing	Weekly meetings with client liaison	■	■	■	■	■	■	■	■	■	■
	Project portal updates	■	■	■	■	■	■	■	■	■	■
	Engagement and Communication Plans execution	■	■	■	■	■	■	■	■	■	■

5.0 Budget

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

Key Phases	Key Deliverables	Proposed Costs
Phase 1: Initial Planning & Assessments	<ul style="list-style-type: none"> Detailed work plan and schedule Create online project lab portal; project branding Engagement and Communications Plans Begin initial assessments and Situational Analysis Strategic Planning meetings 	\$1,000 \$4,000 \$4,000 \$2,500 \$10,000
Phase 2: Public and Stakeholder Engagement	<ul style="list-style-type: none"> Community Survey #1 Key stakeholder interviews Data visualization on portal Complete Situational Assessment Report Traverse City Think-Tank Workshop Traverse City Think-Tank Report 	\$3,000 \$1,000 \$3,000 \$2,500 \$9,000 \$5,000
Phase 3: Plan Development	<ul style="list-style-type: none"> Roundtable Work Session to determine Strategic Pillars Community Survey #2 Focus Groups with specified stakeholder groups to develop Strategic Pillars Draft and develop Traverse City Strategic Action Plan with Implementation Plan Community Dashboard/Balanced Scorecard 	\$2,000 \$3,000 \$15,000 \$8,000 \$3,000
Phase 4: Final Plan	<ul style="list-style-type: none"> Finalize Traverse City Strategic Action Plan; input incorporated Present final Traverse City Strategic Action Plan 	\$2,000 \$2,000
TOTAL	FIXED PRICE PROPOSAL	\$80,000

Proposed payment schedule:

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

6.0 References

Below are four references who may be contacted regarding Future iQ’s similar work experience. All of the references are aware that they may be contacted. Additional references may be provided as needed.

<p>City of Romulus, Michigan (2022-2023) Vision Romulus – Our Community, Our Future</p>	<p>Julie A. Wojtylko, CPM Chief of Staff City of Romulus Office of the Mayor Tel: 734-955-4501 Email: jwojtylko@romulusgov.com</p>
<p>City of Smithville, Missouri (2019) Vision and Strategic Action Plan; Smithville Comprehensive Plan (2019-2020) Smithville Parks & Recreation Master Plan (2021) Smithville Transportation Master Plan (2021-2022)</p>	<p>Cynthia Wagner City Administrator City of Smithville Smithville, MO 64089 Tel: 816-532-3897 Email: cwagner@smithvillemo.org</p>
<p>Lorain County, Ohio Strategic Action Plan (2023-present)</p>	<p>Dave Greenspan, Special Projects Traverse City Board of County Commissioners Elyria, Ohio 44035 Cell: 678-571-8888 DGreenspan@LorainCounty.us</p>
<p>City of Edina, Minnesota Vision Edina (2014-2015) Nodes and Modes (2017)</p>	<p>Scott Neal City Manager City of Edina Edina, MN 55424 Tel: 952-826-0401 Email: sneal@edinamn.gov</p>

7.0 Appendix A: Team Resumes

7.1 Project Director, David Beurle, CEO, Future iQ

RÉSUMÉ



david@future-iq.com

David Beurle is a world-renowned strategist, futurist, researcher and practitioner. As founder and CEO of Future iQ, David is a pioneer and expert in creating new and innovative future planning approaches for use in community, regional, industry, organizational and government settings. David has pioneered the application of scenario planning within regions, industry and corporations around the world. David created the Future Game™, a global planning and workshop tool that has been used in over 600 workshops across 10 countries. As CEO of Future iQ, David has led global projects across 4 continents and has written a number of foresight papers: future-iq.com/foresight-research.

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 the major role in all of Future iQ's projects as lead project manager. More details on David's work can be seen at davidbeurle.com.

EDUCATION

Bachelor Degree in Agricultural Science, University of Sydney, 1984

EMPLOYMENT

Founder & CEO Future iQ, USA & Europe, 2003 – Present

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

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

PHILANTHROPIC WORK

Board Director, Western Australian Community Foundation, 2003-2005

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



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DAVID BEURLE B.SC, AGR

CHIEF EXECUTIVE OFFICER

RECENT PROJECT EXPERIENCE

- Littleton Comprehensive Economic Development Strategy, Colorado, 2023
- Unified Government Economic Development Strategic Plan, Kansas, 2023
- Vermont Future Forest Strategic Roadmap, Vermont, 2023-2024
- New England Regional Defense Industry Collaboration, New England, 2019-2024
- Transforming Tomorrow Together – Greater Mankato 2040, Minnesota, 2022-2023
- Flint Hills Regional Council Sustainability Plan and Roadmap, Kansas, 2023
- Smithville Schools District Strategic Plan, Missouri, 2023
- Florida Network Mapping, Florida, 2022
- Vision Romulus, Our Community, Michigan, 2022
- Transforming Together Tomorrow - Greater Mankato, Minnesota, 2022
- Moab - Tomorrow Together, Utah, 2022
- The Future of Well Being Foresight Project, Minnesota, 2021-2022
- Envision East Central Iowa, Iowa, 2021-2022
- University City Community Vision, Missouri, 2021-2022
- Northern Forest Rural Tourism Academy, New England, 2021-2022
- City of Smithville Transportation Plan, Missouri, 2021-2022
- Town of Falmouth Vision & Values, Maine, 2020-2021
- The Middle Georgia Innovation Project, Georgia, 2020-2021
- City of Smithville Comprehensive Plan, Missouri, 2020
- Park City Community Vision & Strategic Action Plan, UT, 2019-2020
- NOHOA Community Survey 2019-2020
- ECC Medical/Well-Being Strategic Marketing Plan & Economic Development Plan, Minnesota, 2016-2019
- Tillamook County Strategic Vision & 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, TX, Community Visioning, 2018-2019
- 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
- New Hampshire Aerospace & Defense Consortium, Strategic Action Plan, 2017-2018
- Hilton Head Island, South Carolina, Community Visioning Project, 2016-2017
- University of MN, Future of Midwest Agriculture, 2016-2017
- Task Force LIMA Defense Initiative, Ohio, US, 2015-2017

RECENT PUBLICATIONS

- Vermont Forest Future Think-Tank Report, 2023
- Flint Hills Regional Council Think-Tank Report, 2023
- Vision Romulus Strategic Action Plan Report, 2023
- Moab Vision & Strategic Action Plan, 2023
- Florida Adventure Travel Network Final Report, 2022
- Vision Romulus Think-Tank Report, 2022
- The Future of Wellbeing, Minnesota, 2022
- The Future of Manufacturing in Illinois, 2022
- Envision East Central Iowa Final Report, 2022
- University City Community Vision Final Report, 2022
- Town of Falmouth Vision & Values Final Report, 2022
- The Middle Georgia Innovation Corridor Report, 2021
- City of Smithville Parks & Recreation Master Plan, 2021
- The Holding Space: A Guide for Partners in Tribal Research, 2020
- The Future of Urban Living, 2019
- The 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

RECENT KEYNOTE PRESENTATIONS

- SMART Manufacturing Conference, Pennsylvania, October 2022
- ITB Berlin Travel Trade Show, Berlin, March 2022
- The Mahoosuc Way Summit, Maine, February 2022
- Aggregate Producers of Wisconsin Annual Convention, Wisconsin, December 2021
- Ohio Food Summit, Ohio, USA, March 2020
- Greater Mankato Annual Summit, Minnesota, USA, March 2020
- New North Regional Summit, Wisconsin, USA, December 2019
- New Hampshire PTAC Conference, NH, USA, December 2019
- Institute of Directors (IoD) Annual Conference, Glenaeagles, Scotland, October 2019
- E.P.I.R.C Manufacturing Conference, PA, USA, October 2019
- City of Smithville Youth, Missouri, USA, September 2019
- AgFutures 2035 Conference, Perth, Australia, August 2019
- Agricultural Symposium keynote, Emmetsburg, Iowa, USA, March 2019
- Wisconsin Integrated Resource Management Conference, Stevens Point, Wisconsin, USA, February 2019
- The Future of Urban Living Consultation, St George's House, Windsor Castle, UK, December 2018

7.2 Adam Bentley, Research Strategist, Future iQ

RÉSUMÉ



adam@future-iq.com

EDUCATION

Bachelor of Arts in Political Science,
University of Northern Iowa

Master of Public Policy, University of
Northern Iowa

Master of Business Administration, Texas
A&M-Commerce

EMPLOYMENT

Senior Planner/Economic Development
Specialist - East Central Iowa Council of
Governments, 2019-2022

Assistant Village Administrator -
Waunakee, WI, 2016-2019

Adjunct Faculty - Buena Vista University,
2016-Present

Assistant City Manager - Manhattan,
Kansas, 2013-2014

Administrative Assistant to the City
Manager - Iowa City, IA, 2011-2013,

Management Fellow, Wichita, KS, 2010-2011

AWARDS / CERTIFICATIONS

Young Professional of the Year 2019-
Waunakee Chamber of Commerce

International City/County Management
Association (ICMA) Essential Management
Skills Certificate

Heartland Economic Development Course
(HEDC) Certified

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ADAM BENTLEY B.A., M.P.P., M.B.A.

RESEARCH STRATEGIST

Adam Bentley works for Future iQ as Research Strategist. Adam's background includes experiences working with local and regional governments across the American Midwest. He has a broad background which includes government administration, economic development, strategic planning, human resources, and grant writing. Adam holds a master's degree in public policy from the University of Northern Iowa and a master's degree in business administration from Texas A&M-Commerce. He also serves as an adjunct faculty member for Buena Vista University teaching courses in government, management, and liberal arts.

Adam has a passion for public service and continues to volunteer in local city and non-profit organizations to help improve his community.

RECENT PROJECT EXPERIENCE

- Flint Hills Regional Council
Sustainability Plan and Roadmap,
Kansas, 2023
- Vermont Forests Future Strategic
Roadmap; 2022 - present
- Transforming Tomorrow Together -
Greater Mankato 2030; Minnesota,
2022
- East Central Iowa Council of
Governments Comprehensive Economic
Development Strategy; Iowa, 2022

7.3 Celine Beurle, COO, Future iQ

RÉSUMÉ



celine@future-iq.com

EDUCATION

Masters Degree in Sociology
University College Cork, 1998

B.A. Hons Degree in Sociology/Philosophy
University College Cork, 1996

B.A. Hons Degree Sociology
University of Warwick, 1995

EMPLOYMENT

C.O.O. Future iQ

USA and Europe, 2012 – Present

Managing Director Future iQ Europe, Ltd
Europe, 2012 - Present

Manager, Govt. Employment Service

Ireland, 2003 – 2012

Animal Welfare Policy Chair

Green Party Ireland, 2003 – 2009

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CELINE BEURLE B.A., M.A.

CHIEF OPERATING OFFICER

Celine Beurle is Chief Operating Officer (COO) of Future iQ and is Joint Owner and Managing Director of Future iQ Europe. Within her role in Future iQ since 2012, she has been responsible for Future iQ's global expansion to encompass South America, Italy, Spain, Portugal and the UK to date. Celine has an impressive background academically in both Sociology and Philosophy and this has led to her ongoing interest in pursuing societal change. This has enabled Future iQ to view projects through the often needed 'sociological lens'. As COO, Celine works with the CEO on the overall strategic direction of Future iQ. One part of her many roles is that of project co-ordination of many global projects and this is the area that Celine enjoys most as she has an innate ability to run and effectively manage and co-ordinate projects on time and on purpose.

RECENT PROJECT EXPERIENCE

- Vermont Future Forest Strategic Roadmap, Vermont, 2023-2024
- New England Regional Defense Industry Collaboration, New England, 2019-2024
- Flint Hills Regional Council Sustainability Plan and Roadmap, Kansas, 2023
- Moab - Tomorrow Together, Utah, 2022
- Vision Romulus - Our Community, Our Future, Michigan, 2022
- Florida Adventure Network Mapping, Florida, 2022
- The Middle Georgia Innovation Project, Georgia, 2020 - 2021
- Park City Vision 2020, Utah, 2019-2020
- City of Smithville Strategic Planning, Missouri, 2019
- Tillamook County Strategic Planning, Oregon, 2019
- The Future of Urban Living consultation, Windsor Castle, UK, 2018
- Middle Georgia Charrette and Regional Planning Initiative, Georgia, 2018
- Coppell Vision 2040, Texas, 2018
- Hilton Head Island Visioning, South Carolina, 2017
- La Laguna Regional Planning, Tenerife, Spain, 2017
- Greater Lima Region, Ohio, 2016-2017
Griffith Foods Scenario Planning, Chicago, USA, 2016
- Mediterranean PORTS EU Projects, Italy/France, 2015
- Fox Valley Defense Industry Adjustment, Wisconsin, 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
- Global Think Tank, Windsor Castle, UK, 2012

RELEVANT PUBLICATIONS

- Vermont Forest Future Think-Tank Report, 2023
- Flint Hills Regional Council Think-Tank Report, 2023
- Vision Romulus Strategic Action Plan Report, 2023
- Moab Vision & Strategic Action Plan, 2023
- Florida Adventure Travel Network Final Report, 2022
- Vision Romulus Think-Tank Report, 2022
- Moab - Tomorrow Together Think-Tank Report, 2022
- Park City Vision 2020 Final Vision and Strategic Action Report, 2021
- Middle Georgia Innovation Framework and Ecosystem Report, 2021
- Middle Georgia Innovation Roadmap Report, 2021
- Middle Georgia Innovation Corridor Report, 2021
- Park City Vision 2020 Think-Tank Report, 2019
- Vision 2040 Community Engagement Report, 2018
- Middle Georgia Charette and Regional Planning Stakeholder Engagement Report, 2018
- Hilton Head Island - Our Future Think Tank Report, 2018
- Hilton Head Island - Our Future Stakeholder Engagement Report, 2018
- Vision 2040 Think Tank Report, 2018
- Middle Georgia Charette and Regional Planning Think Tank Report, 2018
- Future iQ Project Communication Plan - Framework and Approach, 2017
- Greater Lima Region Stakeholder Ecosystem Analysis, 2017
- Economic Development in Edina Stakeholder Analysis, 2017
- Griffith Foods Stakeholder Analysis Report, 2017
- An Exploration of Focus Group Methodology, 2016
- The Future of Food, 2016
- Grains Industry Network Mapping Report, 2015
- Agriparco Montespertoli Scenario Planning Report, 2014

7.4 Heather Branigin, Vice President, Future iQ

RÉSUMÉ



heather@future-iq.com

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

Volunteer Judge, Future City
Competition, 2017

Co-President (2011-2013); Board Member
(2010, 2014) UNA-MN

Board Member and Secretary, Caring
for Cats, 2019-2021

Advisory Council Member,
UNA-MN, 2014-present

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

VICE PRESIDENT, FORESIGHT RESEARCH

Heather leads Future iQ's research projects, most recently co-authoring *The Future of Wellbeing* and *The Future of Urban Living*. She has extensive experience in local government and the nonprofit sector and is an accomplished project manager. Heather has a well-developed ability to assimilate information into thoughtful and coherent report and proposal writing. She applies the integration of future trends, data analysis and public engagement into implementable strategy development for clients. Through her work, Heather provides critical resourceful guidance needed to empower communities and organizations to make decisions that build sustainability and resiliency as they face a future of accelerated change. Originally from Canada, Heather has pursued her international interests through her philanthropic work with the United Nations Association of Minnesota.

RECENT PROJECT EXPERIENCE

- Keene Comprehensive Master Plan, NH 2024-2025
- COSCDA Strategic Action Plan, DC, 2023-2024
- Littleton Comprehensive Economic Development Strategy, CO, 2023-2024
- Unified Government of WYCO-KCK Economic Development Strategic Plan, KS 2023
- Age-Friendly MNTAP Grant, 2023-2024
- Smithville School District Strategic Action Plan, MO, 2022-2023
- The Future of Wellbeing, MN, 2022
- Transforming Tomorrow Together - Greater Mankato 2030, MN, 2022-2024
- University City Community Vision 2040 Strategic Roadmap, MO, 2022
- ECICOG Comprehensive Economic Development Strategy, IA, 2022
- Falmouth Vision and Values, ME, 2022
- Greater Bemidji Strategic Action Plan Update, MN, 2022
- IMEC Future of Manufacturing in IL, 2022
- The Middle Georgia Innovation Project, 2021
- Smithville Parks & Rec Master Plan 2030, MO, 2021
- Denton Comp. Solid Waste Management Strategy, TX, 2021
- The Future of Chiropractic Strategic Visioning, OR 2021
- Smithville Comprehensive Plan, MO, 2020
- Kinship Fellows and Food: Land: Opportunity Grantees Summit, IL, 2020
- Trotwood Org. Strategic Plan, OH 2019
- New North Business Intelligence Strategic Action Plan, WI, 2019
- City of Mitchell Community Vision and Action Plan, SD, 2019
- Future of Urban Living Global Consultation at Windsor Castle, UK, 2018
- IDNR Sustainable Materials Management - Vision for Iowa, Iowa DNR, 2019
- Tillamook County Strategic Vision and Action Plan, OR, 2019
- ECC Medical/Well-Being Strategic Marketing Plan and Econ Dev Plan, MN, 2016-2019
- NADO Strategic Action Plan, Washington, D.C., 2019
- Coppell Vision 2040, Coppell, TX, 2019
- San Diego, OEA Grant Facilitation, CA, 2016-2019
- Snohomish County Regional Tourism Destination Development, WA, 2018
- McHenry County College Strategic Foresight, IL, 2018
- NHADEC Strategic Plan, NH, 2018
- Waseca Vision 2030, MN, 2018
- University of Minnesota, Future of Midwest Agriculture, MN, 2017
- City of Edina, Vision Edina, MN, 2015

FORESIGHT PUBLICATIONS

- COSCDA Strategic Action Plan, 2024
- Littleton CEDS Plan, 2024
- PlanKCK Economic Development Strategic Plan, 2023
- Smithville School District Strategic Plan, 2023
- The Future of Wellbeing, 2022
- Envision East Central Iowa CEDS Plan, 2022
- University City Community Vision 2040, 2022
- The Future of Manufacturing in Illinois, 2022
- The Future of Chiropractic, 2021
- Middle Georgia Innovation Performance and Gap Analysis Report Part 1: Case Studies, 2021
- Smithville Comprehensive Plan, 2020
- Kinship Foundation Future of Local FoodSystems & Sustainable Agriculture, 2020
- IDNR Sustainable Materials Management - Vision for Iowa, 2019
- NADO Strategic Action Plan, 2019
- Trotwood Organizational Strategic Plan, 2019
- The Future of Urban Living, 2019
- The Future of Tourism - Maine Woods, 2018
- NHADEC Strategic Action Plan, 2018
- The Next Industrial Revolution, 2018
- The Future of Midwest Agriculture, 2017
- The Future of Food, 2016

7.5 Cheryl Wheeler, Community Engagement Specialist, Future iQ

RÉSUMÉ



cheryl@future-iq.com

EDUCATION

B.S. Social Work, University of Dayton,
Dayton, OH

EMPLOYMENT

Assistant to the City Manager - City of
Trotwood, 2017 - present

Director of Children and Senior Services -
Goodwill Easter Seals Miami
Valley, 2002 -2017

Executive Director - Shiloh House Adult
Day Services, 1999 – 2002

PROFESSIONAL AFFILIATIONS

Vice-President - Montgomery County
Council on Aging

Treasurer - Area Agency on Aging, PSA2,
Board of Trustees

Seven Seeds Sowers Coop

Master Trainer - Ohio Dept. of Aging A
Matter of Balance'-Evidence Based Fall
Prevention Program

Advisory Board of Directors - Alzheimer's
Association Miami Valley Chapter

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CHERYL WHEELER B.S.W.

COMMUNITY ENGAGEMENT SPECIALIST

Cheryl Wheeler is an exceptional and proven Community Leader with expertise in engaging diverse community audiences. She has a bachelor's degree in Social Work from the University of Dayton and has over 30 years of experience in project management, strategic planning and program development. Her leadership in national and international program standard achievements have obtained awards of excellence and international accreditation with commendations.

As a member of the Montgomery County Council on Aging and the Area Agency on Aging, Board of Trustees, she advocates for older adults, improving the delivery of services at local, regional, state and national level. She has worked with her city in leading their strategic plan process and engaging the urban and rural communities. She is also a member of the Seven Seed Sowers Coop, providing education and participating in farmer markets providing fresh produce to food insecure communities. She is a recent graduate of the Central State University Extension Incubator Farm program.

RECENT PROJECT EXPERIENCE

- Trotwood Organizational Strategic Plan;
OH, 2019

7.6 Brittany Rempe, Creative Director, Future iQ

RÉSUMÉ



brittany@future-iq.com

EDUCATION

Bachelor of Arts in Public Relations -
Simpson College, 2015

EMPLOYMENT

Creative Director - Future iQ, 2022-present
Communications Specialist - East Central
Iowa Council of Governments 2020-2022
Marketing Communications Coordinator -
Herzog Technologies, Inc., 2015-2020

AWARDS/RECOGNITION

Summa Cum Laude
Simpson College Outstanding Senior,
Integrated Marketing Communications

LEADERSHIP EXPERIENCE

Photo Editor, Simpsonian
Co-Founder, Smoky Room Films



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BRITTANY REMPE B.A. PUBLIC RELATIONS CREATIVE DIRECTOR

Brittany Rempe is Future iQ's Creative Director. Alongside a degree in Public Relations and seven years in communications and design, Brittany has a love of branding and a creative heart. These combine well with a multi-faceted skillset, including graphic design, photography, videography, copy writing and web design. Brittany uses experience and a creative eye to strengthen Future iQ's projects, delighting in the buildout of project identities and accounting for client personality and existing brands. Throughout each project, Brittany offers communications planning, event capture, web design and strong, clear visuals.

RECENT PROJECT EXPERIENCE

- Vermont Future Forest Strategic Roadmap, Vermont, 2023-2024
- New England Regional Defense Industry Collaboration, New England, 2019-2024
- Transforming Tomorrow Together - Greater Mankato 2040, Minnesota, 2022
- Flint Hills Regional Council Sustainability Plan and Roadmap, Kansas, 2023
- Florida Adventure Network Mapping, Florida, 2022
- Moab - Tomorrow Together, Utah, 2022
- Vision Romulus - Our Community, Our Future, Michigan, 2022
- East Central Iowa Council of Governments Comprehensive Economic Development Strategy Update, Iowa, 2022
- The Future of Wellbeing Foresight Project, Minnesota, 2022
- University City Community Vision 2040, Missouri, 2021-2022
- Northern Forest Rural Tourism Academy; New England, USA
- Town of Falmouth Vision and Values; Falmouth, ME
- Vision Romulus - Our Community, Our Future, Michigan, 2022
- Florida Adventure Network Mapping, Florida, 2022
- Park City Vision 2020, Utah USA

RELEVANT PUBLICATIONS

- Vermont Forest Future Think-Tank Report, 2023
- Flint Hills Regional Council Think-Tank Report, 2023
- Vision Romulus Strategic Action Plan Report, 2023
- Moab Vision & Strategic Action Plan, 2023
- Florida Adventure Travel Network Final Report, 2022
- Vision Romulus Think-Tank Report, 2022
- The Future of Wellbeing, Minnesota, 2022
- University City Community Vision Final Report, 2022

7.7 Sonia Labanda, Translator, Future iQ

RÉSUMÉ



sonia@future-iq.com

EDUCATION

Graduate in Teaching Primary Education - University of Salamanca, 2016

Certificate in French - Level B2, 2012

BA in English - University of León, 1994

EMPLOYMENT & ASSOCIATIONS

Translator - Future iQ, 2014 - Present

Teacher of English - Secondary High School, León, 2018 - Present

Associate Teacher - University of León, 2019 - Present

Teacher of English - Peñacorada International School, 2009 - 2018

CEO - Academia Julio Del Campo, León, 2002 - 2010

SONIA LABANDA

TRANSLATOR

Sonia has been working as a teacher of languages for more than 20 years. She has also worked as a French lecturer at León University and organized specific language programmes at the León military base. Sonia has been working with Future iQ since 2014 translating much needed materials and reports into Spanish or French for a variety of global projects. Moreover, she has also taken part in interpretation roles for some visioning projects in Spain.

RECENT PROJECT EXPERIENCE

- Unified Government of Wyandotte County-Kansas City, Kansas Economic Development Strategic Plan, 2023
- Moab - Tomorrow Together, Utah, 2022
- McKinney Solid Waste Management Strategy, Texas, 2021
- Park City Vision 2020, Utah USA, 2020
- Mitchell - Forward 2040, South Dakota, 2019
- Hilton Head Island Visioning, South Carolina, 2017
- La Laguna, The Canary Islands, Spain, 2016-2018
- SAVOIR Project, Italy & France, 2015
- Mediterranean Sea Ports Project, Italy & France, 2015
- Mountains of León, Northern Spain, 2014

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7.8 Walter Paixao-Cortes, Data Engineer, Future iQ

RÉSUMÉ



walter@future-iq.com

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

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WALTER R. PAIXÃO-CÔRTEZ M.A., B.A.

DATA ENGINEER

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

- Vermont Future Forest Strategic Roadmap, Vermont, 2023-2024
- New England Regional Defense Industry Collaboration, New England, 2019-2024
- Flint Hills Regional Council Sustainability Plan and Roadmap, Kansas, 2023
- Smithville School District Strategic Action Plan, Missouri, 2022-2023
- Transforming Tomorrow Together - Greater Mankato 2040, 2022-2023
- Florida Adventure Network Mapping, 2022
- Romulus- Our Community, Our Future, Michigan, 2022
- Moab - Tomorrow Together, Utah, 2022
- East Central Iowa Council of Governments, Iowa, 2021-2022
- University City Community Vision 2040, Missouri, 2021-2022
- City of Smithville Transportation Master Plan, Missouri, 2021 - 2022
- Town of Falmouth Vision and Values, Maine, 2020 - 2021
- The Middle Georgia Innovation Project, Georgia, 2020 - 2021
- Mitchell Forward 2040, South Dakota, 2019
- Park City Vision 2020, Utah, 2019
- New England Regional Defense Industry Collaboration Initiative, New England, 2019-2023
- City of Smithville Visioning and Strategic Action Plan project, Missouri, 2019
- Tillamook County Strategic Planning, Oregon, 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