

OTSEGO COUNTY STRATEGIC PLAN SCOPE OF WORK

PHASE 1- STRATEGIC PRIORITIZATION PLAN

As requested by the County, we have put together a scope of work to complete a Strategic Prioritization Plan that is to be accomplished in approximately 5 weeks. We recognize that this is an aggressive timeline to complete the Strategic Prioritization Plan and have prepared a flexible scope of work that we intend on finalizing with the County so that the work effort will achieve the County's desired outcome. In order to meet this timeline, the Laberge Team will provide a detailed checklist of documents and materials needed from the County and its municipalities. In addition, the Department Head Questionnaire will be provided prior to the kick-off meeting for each municipality to distribute. All requested materials will be due back to us at the kick-off meeting in the electronic format requested. We will facilitate periodic teleconference calls throughout the process to get feedback on deliverables.

TASK 1. PROJECT INITIATION & COORDINATION

Task 1.1 Kick-Off Meeting

An initial "kick-off" meeting will be conducted to introduce our team and begin the planning process with the Advisory Committee. The Advisory Committee is anticipated to include key representatives from the County and may include additional members from each municipality. To ensure that the Strategic Plan evolves with optimal local support, the Laberge Team will work closely with the County and the Advisory Committee to develop appropriate avenues to streamline existing data, build public awareness about the planning effort and develop priorities that will be successful for each municipality. Each municipality will assist in identifying elected and appointed officials, department leaders, and other key stakeholders (i.e. economic developers, business leaders) that will be engaged during the outreach and visioning phase.

Task 1.2 Advisory Committee Meetings & Coordination

To ensure the development of a product that responds to the needs of the County and its municipalities, there will be frequent interaction between the Laberge Team and the project's representatives throughout the planning process. Following the initial "kick-off" meeting, we recommend weekly coordination conference calls and up to two additional meetings to review and set priorities. These meetings will focus on fine-tuning the tasks related to the planning effort, outreach process, results of the outreach process, as well as the findings of our research efforts. The Laberge Team will work with the Advisory Committee to schedule meeting times and locations, will prepare agendas and deliver necessary meeting materials to the Committee prior to each meeting.

Deliverables:

- Development of final scope of services.
- Kick-off Meeting with Committee.
- Attendance and facilitation of up to 4 conference calls and 2 additional Committee meetings (one of which will be a part of the 3-day charette).
- Community outreach program and identification of stakeholders.
- Development of meeting agendas and materials, as applicable.

TASK 2. COUNTY & COMMUNITY PROFILES

Task 2.1 County & Municipal Summary Reports

Demographic & Growth Trends Snap Shot

Research and prepare a brief county-wide snap shot of Demographic and Growth Trends including, but not limited to population, age distribution, employment, education, economic indicators, and housing composition. The Laberge Team will identify demographic trends of the overall County and each of its municipalities, including patterns and changes in population and employment to understand and project data into the future for the communities. The purpose of this effort is to provide an overview of the municipalities current conditions in

order to understand trends and highlight areas of concern. Demographic data will primarily be taken from the most recent Decennial Census and the American Community Survey updates. In addition, GovIstics, a proprietary source, will be used where appropriate. Every attempt will be made to identify and use the most current data available.

Community Plans Summary: The Laberge Team will collect and review pertinent municipal plans that identify locally adopted visions, goals, and/or strategies for the future as they may relate to community and economic development as well as efforts for improving government efficiency and public facilities. These documents will be evaluated in terms of their implementation status, and their relationship with the regional vision outlined in the *Mohawk Valley Regional Economic Development Council Strategic Plan*.

Summary of Mohawk Valley Regional Goals & Municipal Goals: The Laberge Team will review the *Mohawk Valley Regional Economic Development Council Strategic Plan* to develop a summary of regionally important goals, and/or strategies for the future as they compare to local planning efforts.

Task 2.2 Summary of County/Municipal Departments

In order to create a high level overview of all of the municipal services provided by each local government in the County, the Laberge Team will compile comparative matrix of departments/services and an overview of general staff duties and functions provided by each community.

Deliverables:

- County & Municipal Summary Report.
- Summary of County & Municipal Departments
- Maps

TASK 3. PUBLIC OUTREACH & COMMUNITY VISIONING

The public outreach process will be done over a consecutive three day period. This time intensive process will allow the Laberge Team to schedule and coordinate with department leaders to maximize their involvement while minimizes their time during these three days.

Task 3.1 Elected/Appointed Officials & Department Heads Questionnaire

Municipal leaders will be asked to complete a questionnaire prepared by the Laberge Team prior to the kick off meeting. Information obtained from the questionnaire will be used for discussion purposes during the interviews described below. As part of each questionnaire, these key stakeholders will provide detailed information to identify priority services and needs. The questionnaire will be available in written and electronic format and circulated to all department heads and other appropriate municipal staff members. The Laberge Team will tabulate and summarize the questionnaire for the Advisory Committee's review and later incorporate it into the study. In order to obtain the information necessary to complete this task in a timely manner it is imperative that the County and participating municipalities provide all requested information to the Laberge Team within the timeframe provided.

Task 3.2 Department Interviews/Roundtables

The Laberge Team will work with the Advisory Committee to finalize a list of key department heads and/or staff to be interviewed as part of the three day outreach. The Laberge Team will conduct roundtable interviews with department heads and relevant staff in order to gather additional information regarding duties, functions, key issues confronting each department, and recommendations from personnel involved in the delivery of municipal services. This exercise will be helpful in developing a prioritized list needs that will be further developed later into regional priorities. These roundtables will be coordinated by department (both County and municipalities) to maximize involvement without requiring a significant commitment of time from each department. Roundtable sessions will be approximately 1.5 hours each; we envision key department roundtables to include: Highway,

Public Works, Public Safety, Fire/EMS, Parks/Recreation, Water, Sewer, and Administration. Participants from the County and municipalities will be grouped accordingly.

Task 3.3 Elected Official Interviews/Roundtables

Also as part of the three day outreach, the public participation process will include interviews and/or focus group discussions with elected officials countywide. The interviews will allow all key stakeholders to discuss, in detail, the issues and concerns that face their home-town on a daily basis. These discussions will focus on identifying any current problems these groups perceive, brainstorming potential solutions, and identifying ways to implement future solutions.

Task 3.4 SWOT/Visioning, Government & Efficiency Opportunities Workshop

This public workshop will be held in the evening of day one and will be held in a central location to assist participants in articulating a “preferred future” or “vision” for the County. The feedback gathered from this workshop will be the springboard for the development of the preliminary goals and strategies. Participants will first be guided through an exercise designed to solicit feedback regarding the County’s assets and liabilities. Sometimes known as a SWOT workshop, stakeholders and participants will be asked to consider the strengths, weaknesses, opportunities, and threats associated with the County as a whole. Following this exercise, participants will be broken into small groups and asked to review the previously identified “assets” and “liabilities” and brainstorm solutions/actions that should be taken to transform obstacles into opportunities. The final activity of the workshop is that each participant review the ideas generated in each topic area and indicate their individual priorities. Using aerial maps, workshop participants will also come together to share their ideas on how the region should be improved conceptually. Participants will also be asked to identify, among other things, where they would like to see aesthetic enhancements, infrastructure improvements, economic development, the creation of new parks, open space protection, housing improvements, transportation enhancements, pedestrian and bicycle circulation improvements, and other design considerations that would make the County a more desirable place to live, work, and visit.

Task 3.5 Economic Development Roundtable

During the 3-day workshop, the Laberge Group will facilitate a roundtable with key economic development leaders from throughout the County, including but not limited to the Industrial Development Agency, local development corporations, the Chamber of Commerce, tourism leaders, and others to assist with identifying and prioritizing economic development opportunities for Otsego County. The results of this consensus building roundtable will include a detailed list of priorities for the County and each of the municipalities.

Task 3.6 Roundtable Goal & Efficiency Opportunities Prioritization

On the last day, the Laberge Team will facilitate a roundtable with key officials, department heads and/or staff to prioritize the preliminary goals and strategies identified previously through the stakeholder outreach and public participation process. Participants will review and discuss all of the strategies and be asked to rank their priorities. The results of this consensus building roundtable will include a detailed list of priorities for the County and each of the municipalities.

The following is a sample schedule for completing Task 3.

3 –Day Schedule (SAMPLE)

Day 1

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| 10am-4pm | Department Interviews/Roundtables |
| 4:00 – 6pm | Elected Officials Interviews/Roundtables |
| 7:00 – 9:00pm | SWOT/ Visioning, Government & Efficiency Opportunities Workshop |

Day 2

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|------------|--|
| 10am – 4pm | Department Interviews Finished & Roundtable Goals |
| 4:00 – 6pm | Elected Officials Interviews Finished & Roundtable Goals |

Day 3

9am-12pm

Economic Development Roundtable

1am-4pm

Goal Prioritization & Initial Efficiency Opportunities & Advisory Committee Meeting

Deliverables:

- Questionnaire (provided prior to Task 1.1 Kick-off meeting).
- Facilitation of 3 Day Public Outreach
- Outreach materials, including press release and flyer
- Summary of Outreach Findings & Priorities

TASK 4. DRAFT PLAN & PRIORITIES

Task 4.1: Summary of County/Municipal Needs & Goals:

The Laberge Team will develop a summary of the County and municipal needs based upon the results of the previous tasks. Preliminary goals and strategies will be developed consistent with the key issues identified and the feedback obtained through stakeholder outreach.

Task 4.2: County/Municipal Priorities & Implementation Matrix:

Once the goals and strategies are finalized by the Committee, these the goals and strategies will be put into an implementation matrix that identifies for each strategy who is responsible, priority projects, timeframe, potential funding, and any other key information to measure and benchmark the success of the Plan. The Laberge Team will then work with the County and the Advisory Committee in setting the priorities for implementation. Each priority will be tied back or referenced with the *Mohawk Valley Regional Economic Development Council Strategic Plan*.

Task 4.3: Draft Plan Development:

The draft Strategic Plan will tie together all elements completed throughout the planning process. The results from Tasks 1 through 3 will be synthesized into the draft plan. The draft plan will include, but not be limited to information contained within the community profile report and maps, the results of the public participation process, and key issues identified through the Committee meetings. The draft plan will also include an implementation matrix consisting of a variety of goals and strategies guiding future improvements throughout the community, as well as a concise priority list for the County and each municipality. The Laberge Team will develop and present the Draft Strategic Plan to the County for their review.

Deliverables:

- Summary of County/Municipal Needs & Goals
- County/Municipal Priorities & Implementation Matrix
- Draft Plan

FEE FOR SERVICE

Based upon the scope of services presented above, the Laberge Group is pleased to offer a fee for services of \$48,500 plus reimbursable expenses. This fee represents approximately 360-420 consultant staff hours over a compressed 5-6 week timeframe after the receipt of the initial data request.