

June 2, 2005

TO: The Honorable Mayor and City Council Members

FROM: John Szerlag, City Manager

SUBJECT: Request to Postpone Consideration of Community Visioning Project to June 20, 2005

Futurist Ed Barlow is unable to make the June 6, 2005 Council meeting but can be in attendance on June 20. As such, I'm requesting that this matter be postponed for two weeks. In the interim, attached is information from Assistant to City Manager Laura Fitzpatrick relative to the methodology and timeline for the proposed community visioning process.

May 27, 2005

TO: John Szerlag, City Manager  
FROM: Laura Fitzpatrick, Assistant to the City Manager  
SUBJECT: Futures Process

*Pubic Input: Methodology and Timeline*

Per your request, below in chart for is the proposed timeline for the Futuring Process as explained in Exhibit B2 of Ed Barlow's proposal. The timeline highlights points of public input and public outreach. City staff recommends that all committee meetings be publicized and open to the public. Details added to the timeline by staff are in italics. These details address a concern for publicizing futuring activities to the community as well as public input in general.

<b>Month</b>	<b>Activity</b>
June	Phase I: DESIGN - Process Development Meet with key leaders to review desired outcomes and develop final process model; develop task force issues and purpose statements
July	Phase I: DESIGN - Process Development Develop budget and resource development plan Hold community leader support breakfast/lunch meeting
August	Phase I: DESIGN - Process Development Develop summary document of area studies, demographic and trend information to serve as background data for participants Develop public communications plan. <i>Set date for and publicize "community-wide" information meeting (Troy Today Fall Newsletter; publicity at the Troy Daze Festival; WTRY cable channel; web site; newspapers, etc.)</i>
September	Phase I: DESIGN - Process Development Hold one hour "community-wide" information meeting ( <i>in the second part of the month as community energies in early September are directed towards the Troy Daze Festival</i> ) <i>Publicize task force kick-off meeting emphasizing that the meetings are open to the public.</i>

October	<p>Phase II: DISCOVERY – Collect, analyze and present trends with possible implications.          Hold six-hour participant/task force kick-off/orientation session  <i>Publicize task force meeting schedules.</i>          Task forces hold environmental scanning and implications meetings          Steering Committee meets monthly to monitor progress</p>
November	<p>Steering Committee meets monthly to monitor progress          Task forces hold environmental scanning and implications meetings</p>
December	<p>Steering Committee meets monthly to monitor progress</p>
January	<p>Hold Discovery integration meeting to share findings of various task forces</p>
February	<p>Phase III – DREAM – Define the desired state and related conditions which will characterize the community          Conduct discover integration meeting with all participants          Elicit desired state and related future conditions from participants          Develop vision statement and support documents of strategic directions          Disseminate vision statement and support materials to task forces for use during the Determine Phase          Begin development of artwork and graphics with represent the vision statement</p>
March	<p>Phase IV – DETERMINE – Formulate goals, objectives, action strategies and responsibilities  <i>Publicize upcoming task force meetings.</i>          Task forces hold goal/objective/action strategy development meetings.          Task forces develop final reports.          Steering committee meets monthly to monitor progress and develop implementation plan.</p>
April	<p>Phase IV – DETERMINE – Formulate goals, objectives, action strategies and responsibilities          Task forces hold goal/objective/action strategy development meetings.          Task forces develop final reports.          Steering committee meets monthly to monitor progress and develop implementation plan.</p>
May	<p>Phase IV – DETERMINE – Formulate goals, objectives, action strategies and responsibilities          Steering committee organizes draft report and shares with participants.  <i>Draft report status publicized to the community</i></p>
June	<p>Phase IV – DETERMINE – Formulate goals, objectives, action strategies and responsibilities          Steering committee approves final report.          Steering committee meeting with key community leaders and provides “advanced” insight into final report.          Implementation committee established.  <i>Publicize community celebration session to take place in July((Troy Today Fall Newsletter; publicity at the Troy Daze Festival; WTRY cable channel; web site; newspapers, etc.)</i></p>
July	<p>Phase V – DELIVER – Make it happen!          Community celebration session held with announcement of implementation plan.</p>

August	Phase V – DELIVER – Make it happen! Personal visits made by committee members to key leaders and organizations in the community.
September	Phase V – DELIVER – Make it happen! Personal visits made by committee members to key leaders and organizations in the community. <i>Make report information available at the City booth at the Troy Daze Festival; use the festival to promote the report.</i>
October	Phase V – DELIVER – Make it happen! Executive summary of plan distributed to all households <i>and businesses</i> <i>Consider incorporating a summary of the Futures Report in other City documents: City Calendar, Budget, newsletter, etc.</i>
November	Phase V – DELIVER – Make it happen! Formulation of resource development plan to attract revenues for special projects not available from traditional sources.

### *Corridor Study vs. Futuring Process*

Corridor studies and futuring processes are two very different tools that communities use as part of overall strategic planning. The differences between these tools are highlighted below:

- A futuring process is a tool used to tap into civic infrastructure so that community values can be formalized.
- During the futuring process community values are used as a framework to develop community priorities.
- These priorities serve as a compass, providing direction to the community for other planning exercises (such as budgeting and capital project programming).
- A corridor study is an economic development and land use strategic planning tool.
- The corridor study tool provides a framework for “how” a community can maximize its economic viability; whereas futuring is a tool that provides “what” the community desires.
- It is also useful to view a corridor study as a technically driven tool for economic development planning, land use planning and urban design. A futures process is more value-driven. The different “drivers” for these studies complement each other.

May 4, 2005

TO: The Honorable Mayor and City Council Members

FROM: John Szerlag, City Manager

SUBJECT: Proposal from Mr. Ed Barlow to Facilitate a Futuring and Strategic Planning Process for the City of Troy

### **BACKGROUND**

In 1992/93 Mr. Barlow facilitated a Futuring Process for the City of Troy. The culmination of that process was a document entitled "Troy Futures Community Report". And many of the objectives contained therein have been accomplished.

### **CURRENT STATUS**

Twelve years is a long time, and Troy has changed from a growing community to a mature one. It is time to revisit our priorities, forge civic partnerships, develop new objectives and assign responsibility for accomplishing those objectives. Of course, this responsibility should not rest solely with the City of Troy. Additionally, in creating a preferred vision for our community at this point in time, it is of paramount importance for the Troy City Council to partner with all stakeholders in finding commonalities to assure Troy remains a City in which one aspires to live and work.

### **RECOMMENDATION**

I recommend City Council approve the proposal from Ed Barlow to facilitate a futuring and strategic planning process for an amount not to exceed \$50,000. As this process can also segue into a revised master plan of land use, and comprehensive capital improvement plan, funding can be made available through our capital projects fund.

# City of Troy

## Futuring and Strategic Planning Process

**May 3, 2005**

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A Proposal To Facilitate

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## **I. Introduction**

This proposal is submitted for consideration in support of the City of Troy's forthcoming futuring and strategic planning process. I wish to express my appreciation for the invitation to submit this. I have fond memories of the previous activity and am impressed with the manner in which the City has used the results.

This proposal may be looked upon as a formative document, and used as the basis for further discussion to develop the “best” approach to accomplish the futuring and strategic planning process outcomes. I look forward to subsequent conversations.

## **II. Background**

It is my understanding that the City Council desires to revisit and update the last process outcomes and objectives. It is interested in a process similar to one conducted last time in terms of community involvement and timeframe. A schedule to begin in June and be completed by October 2006 with a “community celebration” has been suggested.

The council has expressed interest that the session be “future focused”, in that it will explore emerging trends that will affect the community. Facilitated discussions will consider these trends and develop possible futures and desired states. Process outcomes will be taken by the City Council and used as a framework for future policy-making and decision-making.

## **III. Edward Barlow Background and References**

### **A. Background**

I am a futurist by profession. My mission is to study what is on the roadway ahead, and interpret that to the clients that have invited me to do so. My insights and experience have been used in a variety of settings including, keynotes, think tanks, strategic planning activities and consulting. Clients have been both domestic and international, and include organizations within the private, government and non-profit sectors. Sectors with which I have worked extensively include travel and tourism, financial services, construction, agriculture, manufacturing, law enforcement and public safety retail, community and economic development. A background piece is found as Item A in the Exhibit Section. A more expansive profile of professional services and activities can be found by visiting my website which [www.creatingthefuture.com](http://www.creatingthefuture.com). For purposes of this proposal a representative sampling of clients has been selected.

## **General Client List**

I have served a wide range of organizations representing industry clusters, employer groups, agencies and professions. This provides insight as to the macro trends and issues will affect communities and governmental units. These include:

Federal Reserve Bank System, General Electric, U.S. Department of Commerce, National Association of Manufacturers, National Restaurant Association Six Sigma Academy of Europe, American Hospital Association, Bank of America, Society for Human Resource Managers, Travel Industry Association of American, U.S. Department of Education, United States Agency for International Development, National Association of Home Builders, American Farm Bureau Federation, Whirlpool Corporation, National Association of Counties, Association of General Contractors, Marriot Corporation, American Association of State Highway Directors, National Association of Workforce Boards, California Association of Planning Officials, Federal Bureau of Investigation, and the American Correctional Association

I have also testified before the U.S. Congress on areas of workforce, tourism and transportation.

## **City Government and Community Related Activities**

Since 1990, I have designed and facilitated over 150 strategic planning activities for companies, associations, and communities. Sixty-five of these are community visioning and strategic planning processes, five of which have received awards. I have also facilitated numerous strategic planning retreats for city, county and other governmental unit boards and councils. This has provided an understanding of policy governance within governmental setting, and issues related to community engagement. This client list includes:

City of Lakeland-Florida, City Troy-Michigan, Alamo Region Workforce Initiative-San Antonio, Texas, Prince Georges County-Maryland, Sonoma County-California, Dakota County-Minnesota, St. Clair County-Michigan, City of Albert Lea-Minnesota, City of Hamilton-Ohio, City of Walnut Creek-California, Dodge City-Kansas, and Sullivan County-Tennessee

I have also been hired to work by several states to assist in integrating their economic and workforce development efforts. The most recent states are Colorado, New York, Kentucky and Oklahoma. These efforts have included speaking at community summits which have been entitled "Preparing Our Community for a 21<sup>st</sup> Century Economy," and which were attended by business, education and government leaders.

## **Michigan Experience**

I am from the State of Michigan, living here for all but 14 years, since 1947. I have worked with a variety of organizations and communities within the State and in Southeastern Michigan. Activities have included presentations and strategic planning support. Organizations with which I have worked include:

Leadership Michigan, Michigan Association of Planning Officials, Michigan Municipal League, Whirlpool Corporation, Steelcase, Southeastern Michigan Council of Governments, Michigan Association of Bankers, Michigan Department of Tourism, Michigan Society of Human Resource Managers, Michigan State Police, Michigan Supreme Court, Michigan State University College of Nursing, and Michigan State University College of Law

## **B. References**

Doug Thomas, City Manager  
City of Lakeland - FL  
Telephone: (863) 834-6006  
E-mail: [DouglasThomas@lakelandgov.net](mailto:DouglasThomas@lakelandgov.net)

(Used strategic planning services for city council retreats on two occasions in Lakeland, and for a community futuring process while a city manager in Michigan)

Pat Stocker, President  
Stocker & Associates - MD  
Telephone: (301) 229-6561  
E-mail: [patstocker@aol.com](mailto:patstocker@aol.com)

(Has contracted Ed for corporate engagements for such organizations as Marriot International, Lockheed Martin and the United States Agencies for International Development)

Kathryn Taylor, Secretary  
Oklahoma Department of Commerce & Tourism - OK  
Telephone: (405) 815-5203  
E-mail: [kathy\\_taylor@odoc.state.ok.us](mailto:kathy_taylor@odoc.state.ok.us)

(Used services for Governor's conferences on economic development and tourism, as well as facilitator for special Governor's Council for Economic and Workforce Development as several community summits)

Greg Handel  
Detroit Regional Chamber - MI  
Telephone: 313-596-0331  
[Ghandel@detroitchamber.com](mailto:Ghandel@detroitchamber.com)

(Used professional services for recent southeastern Michigan Workforce Summit)

Carlos Garcia, Superintendent  
Clark County School District - NV  
Telephone: (702) 799-5307  
E-mail: [cgarcia@interact.ccsd.net](mailto:cgarcia@interact.ccsd.net)

(Used professional services for sessions with community, school board and school administrators)

## **IV. Suggested Process Approach**

### **A. Futuring and Strategic Planning Model**

In approaching any type of strategic planning activity, be it a retreat or a longer term process, I use a five step model. These steps are...

- I. Design - Develop a process which is inclusive and supported by good data**
- II. Discover - Collect, analyze, and present trends with possible implications**
- III. Dream - Define the desired state and related conditions which will characterize the community**
- IV. Determine - Formulate goals, objectives, action strategies, and responsibilities**
- V. Deliver - Make it happen!**

A schematic of this process is found as Item B within the Exhibit Section. It also suggests the related months of process activities.

### **B. Ed Barlow Activities**

I will support the entire process as is represented above and the related exhibit. It is assumed that City of Troy staff and volunteers will be involved and provide input and technical assistance as during the last process. (Which was exceptional) Specific tasks though which I will work include:

1. Research
2. Presentation
3. Facilitation
4. Technical Assistance (onsite and via telephone and internet)

## **V. Proposed Costs**

The cost for process support is suggested at this time as not to exceed \$50,000. This includes professional fees and travel related expenses. Adjustments may be necessary should the scope of service needed be modified. Again, it is suggested that the City staff and community participants will be actively involved. The actual contract and related billing and accounting activities will be can be defined should this proposal be accepted.

## **VI. Exhibits**

**A. Ed Barlow Flyer**

**B. Futuring and Strategic Planning Process Map**

# Creating a Competitive Economic and Workforce Advantage Featuring Ed Barlow

**Available For Your State, Region And Community**

**Popular  
Formats**

**Keynote or Morning Session**

**Customized  
Formats**

## **"Preparing Our Community for a 21<sup>st</sup> Century Economy"**

Take a journey through the uncharted territory of the 21<sup>st</sup> century. Explore how structural changes will affect wealth creation interests of workers, employers and communities. Consider ways to better anticipate and prepare for what is ahead. Don't miss this most insightful, thought-provoking, and entertaining session loaded with ideas and practical take-a-ways!

## **Community Forum**

The morning session is a community forum comprised of key business, government, education and the workforce sector representatives. After Ed Barlow's presentation, attendees will engage in a discussion to identify strategic initiatives the community needs to pursue to prepare employers, the workforce and itself for the dynamics of a 21<sup>st</sup> century economy.

## **Break-Out or Afternoon Session**

## **"Taking Our Workforce Board & Organization to the Next Level"**

Provides a candid look at the current status of workforce boards and organizations. Offers a prescription as to the role workforce boards and organizations should consider as the next step in their evolutionary development. Suggests the invaluable contribution they can make in a time of unprecedented change for employers & workers.



**Ed Barlow, President**

## **Workforce Board & Organization Strategic Planning Session**

The afternoon session is structured for board members, staff, and invited guests. It includes a facilitated discussion on the future role of the local workforce development system, incorporating the input from the community forum. Participants will identify strategic directions which can be used to guide future workforce development system and board activities.

## **Organizations which have used Ed's services include:**

**National Conferences:** National Association of Workforce Boards, National Workforce Association, U.S. Department of Commerce-Economic Development Administration, U.S. Department of Labor, & U.S. Department of Education

**State Workforce Conferences:** AK, AL, AR, IN, KY, CA, CO, OH, OK, MN, MI, NE, NY, NC, MD & VA

**Local WIBs:** Hudson Valley-NY, Central Texas, Fresno-CA, Lehigh Valley-PA, San Bernardino County-CA, South Central Tennessee, Honolulu-HI, Tri-County-Yakima-WA, Northwest Piedmont-NC, Northern Virginia, Palm Beach County-FL, Phoenix-AZ, Butler County-OH, West Central Wisconsin, Will County-IL, Treasure Coast-FL, and more . . .

**Over** 

**For more information: *Creating the Future, Inc.* 2907 Division Street, Suite 109 St. Joseph MI 49085  
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# Ed Barlow

## Educational and Workforce-Related Background

Ed Barlow is President of *Creating the Future, Inc.* and considered one of the most thought-provoking and entertaining speakers on the influences which will affect industry, organizational, professional and community settings. Ed's professional experience includes executive positions in healthcare, business, higher education, and a Washington D.C.-based management consulting firm. He holds a bachelor's degree in political science from Loras College and a master's degree in management from the University of Notre Dame. Ed Barlow's client list represents the "Who's Who" within industry, government, education, and the not-for-profit sector.

### In General . . .

Ed has worked extensively, domestically and internationally, helping industries and organizations to better anticipate and prepare for what's ahead. His services have included keynoting conventions, designing and facilitating think-tanks and strategic planning activities, and consulting. A representative client list includes:

Baxter Healthcare, Aluminum Association of America, AT&T, Marriott International, Blockbuster, U.S. Chamber of Commerce, Federal Express, Six Sigma Academy of Europe, Hewlett Packard, Kimberly Clark, American Hospital Association, IBM, Travel Industry Association of America, National Association of Manufacturers, U.S. Navy, Lockheed Martin, Whirlpool Corporation, and Federal Reserve Bank Systems.

### In Education . . .

Ed held vice presidential positions at two institutions of higher learning, served as superintendent of a school district, and taught high school social studies and Spanish. He served for 10 years as an adjunct faculty member with the Graduate School of Education with the University of San Francisco. As a speaker and strategic planning consultant, Ed has worked with over 140 education and education-related organizations. A sampling of his client list includes:

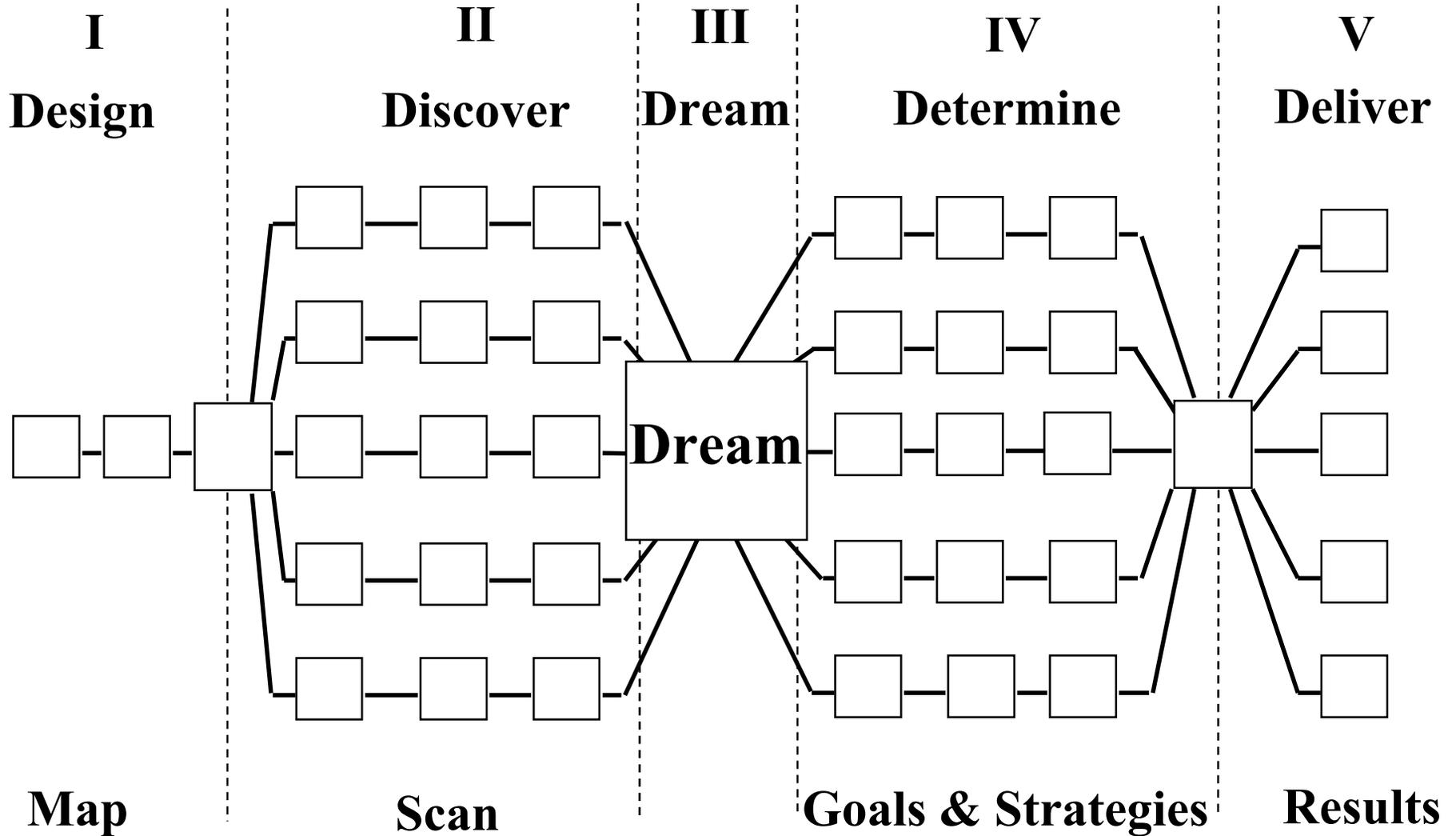
U.S. Department of Education, Association of Community College Trustees, Wisconsin Educational Technology Assn., Michigan Association of School Boards, National Schools Public Relations Association, Iowa State University-College of Agriculture, University of Redlands-CA, Southern Association of College and University Business Officers, Michigan Department of Education, American Association of Adult and Continuing Education, San Diego Community Colleges, Fairfax County Public Schools-VA, College of Southern Idaho, Hillsborough County Public Schools-FL, and Rochester Public Schools-MI.

### In Economic and Community Development . . .

Ed has spoken at numerous economic development conferences at the national, state, and local levels. Most recently, he spoke to 1,200 economic development professionals at two regional summits sponsored by the U.S. Department of Commerce-Economic Development Administration. Ed has also designed and facilitated 50 community visioning and strategic planning processes across the U.S. Five of these have received excellence awards. A representative client list includes:

Gateway Partnership-CA, Tampa Bay Partnership-FL, Lehigh Valley-PA, Ocala Economic Development Corp-FL, Sonoma County-CA, Virginia Economic Development Association, Michigan Economic Developers Association, Missouri Department of Economic Development, Indiana Economic Development Association, Iowa Department of Economic Development, Marin County Economic Development Authority-CA, Hamilton-OH, Farmington Hills-MI, and Evansville-IN.

# Futuring and Strategic Planning



# Community Futuring and Strategic Planning Process

- I. Design - Develop a process which is inclusive and supported by good data**
- II. Discover - Collect, analyze, and present trends with possible implications**
- III. Dream - Define the desired state and related conditions which will characterize the community**
- IV. Determine - Formulate goals, objectives, action strategies, and responsibilities**
- V. Deliver - Make it happen!**

## Phase I – Design

**Develop a process which is inclusive and supported by good data.**

*May - August*

### Process Benchmarks:

- ❑ Meet with key leaders to review desired outcomes and develop final process model.
- ❑ Develop task force issues and purpose statements.
- ❑ Develop budget and resource development plan.
- ❑ Hold community leader support breakfast/lunch meeting.
- ❑ Develop summary document of area studies, demographic, and trend information to serve as background data for participants.
- ❑ Develop public communications plan.
- ❑ Hold one-hour “community-wide” information meeting.

## Phase II – Discovery

**Collect, analyze, and present trends with possible implications.**

*September – December*

### Process Benchmarks:

- ❑ Hold six-hour participant/task force kick-off/orientation session.
- ❑ Task forces hold environmental scanning and implications meetings.
- ❑ Steering Committee meets monthly to monitor progress.
- ❑ Hold Discovery integration meeting to share findings of various task forces.

### **Phase III – Dream**

**Define the desired state and related conditions which will characterize the community.**  
*January*

#### **Process Benchmarks:**

- ❑ **Conduct Discovery integration meeting with all participants.**
- ❑ **Elicit desired state and related future conditions from participants.**
- ❑ **Develop vision statement and support document of strategic directions.**
- ❑ **Disseminate vision statement and support materials to task forces for use during the Determine Phase.**
- ❑ **Begin development of artwork and graphics which represent vision statement.**

### **Phase IV – Determine**

**Formulate goals, objectives, action strategies, and responsibilities.**  
*February - May*

#### **Process Benchmarks:**

- ❑ **Task forces hold goal/objective/action strategy development meetings.**
- ❑ **Task forces develop final reports.**
- ❑ **Steering Committee meets monthly to monitor progress and develop implementation plan.**
- ❑ **Steering Committee organizes “draft” report and shares with participants.**
- ❑ **Steering Committee approves final report.**
- ❑ **Steering Committee meeting with key community leaders and provides “advanced” insight into final report.**
- ❑ **Implementation Committee established.**

### **Phase V – Deliver**

**Make it happen!**  
*June – October*

#### **Process Benchmarks:**

- ❑ **Community celebration session held with announcement of implementation plan.**
- ❑ **Personal visits made by committee members to key leaders and organizations in the community.**
- ❑ **Executive summary of plan distributed to all community households.**
- ❑ **Formulation of resource development plan to attract revenues for special projects not available from traditional sources.**