

TOWN OF FALMOUTH, MAINE  
RFQ FOR CONSULTANT SERVICES TO CONDUCT A  
PUBLIC PROCESS TO DEVELOP A TOWN VISION AND  
VALUES STATEMENT (PHASE 1)  
JANUARY 20, 2020

TOWN VISION  
AND VALUES  
STATEMENT



Submitted by:  
**Future iQ, Inc.**  
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Create Future Intelligence®

Future iQ, Inc.  
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US Federal Tax Number:  
EIN: 27-1389416  
January 20, 2020

Nathan Poore  
Town Manager  
Town of Falmouth  
271 Falmouth Road  
Falmouth, ME 04105

**RE: RFQ for Consultant Services to Conduct a Public Process to Develop a Town Vision and Values Statement (Phase 1) for the Town of Falmouth, ME**

Dear Mr. Poore,

Future iQ is pleased to submit this proposal to serve as the consultant team to conduct a public process to develop a Town Vision and Values Statement for the Town of Falmouth. Please note that **Future iQ would also like to be considered for the potential additional scope of work (phase 2) to assist the Town with updating the 2013 Comprehensive Plan.**

Future iQ has a strong track record of designing and implementing visioning and planning projects across North America, Europe and Australia. Some of the strengths we believe we bring to this project include:

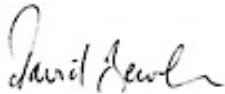
- **We know Maine and the tourism economy.** Future iQ has worked extensively in Maine, particularly on visioning, strategic planning, and tourism development. Future iQ was recently contracted to work with a consortium of organizations to explore the tourism and economic development potential in the Maine Woods area. This project covered most of Maine, and included seven identified regional areas, primarily to the west of the coastline. The work included exploring the potential economic impact of tourism, and research on important emergent trends shaping outdoor and recreation tourism sectors. In 2017, Future iQ also developed a vision and strategic action plan for the Moosehead Lake region.
- **We specialize in strategic planning, visioning and stakeholder engagement.** Stakeholder engagement and collaboration building are cornerstones of Future iQ's visioning and strategic planning methodology. Our planning process specializes in applying innovative tools and approaches that bring together stakeholders to create collaborative and visions and strategic action plans, and an aligned vision for the future. Importantly, our planning process provides a collaborative place for participants to share expertise and ideas, and to openly consider various perspectives on issues of

concern. We have a team of accomplished facilitators who are well versed in steering stakeholder discussions, and exploring local sensitivities and aspirations.

- **We understand the need for balanced community and economic development.** We have worked with many cities, towns, counties and regions at points-in-time when communities have reached generational change, industry tipping points, and other scenarios that involve significant redevelopment phases. For example, our work with the City of Edina in Minnesota involved extensive public engagement with businesses, neighborhood and housing associations, community organizations and individual homeowners as they dealt with issues such as teardowns and rebuilds, re-purposing commercial properties, and higher density zoning issues. Balancing the need for redevelopment as well as the need to maintain the essential character and charm of a community was crucial in the visioning process. Future iQ will bring this sensitivity to Falmouth's visioning process.
- **We bring a future oriented perspective.** Future iQ specializes in studying and understanding larger emergent trends and influences that are re-shaping industries and regions, especially in the Northeast USA. We have also published foresight research on the 'The Future of Tourism – Maine Woods Region', 'Future of Manufacturing', 'Cities of the Future', 'Economics of Collaboration', and the 'Future of Food'. We hosted a global Think Tank forum at Windsor Castle (UK) on 'Building Sustainable Regional Communities' and hosted an additional Think Tank forum there on 'The Future of Urban Living' in December 2018. This experience and knowledge helps us shape truly future oriented planning processes.
- **We understand the power of good data.** Future iQ 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.

Future iQ delivers innovative and customized projects on time and on budget. Our hands-on approach, as well as the effectiveness of our methodology, will help the community stakeholders of Falmouth to maximize the value of the visioning process and achieve realistic actionable outcomes. It would be our privilege to work with the Town of Falmouth on this initiative. Please contact me for clarifications as needed. Thank you for your consideration.

Yours sincerely,



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

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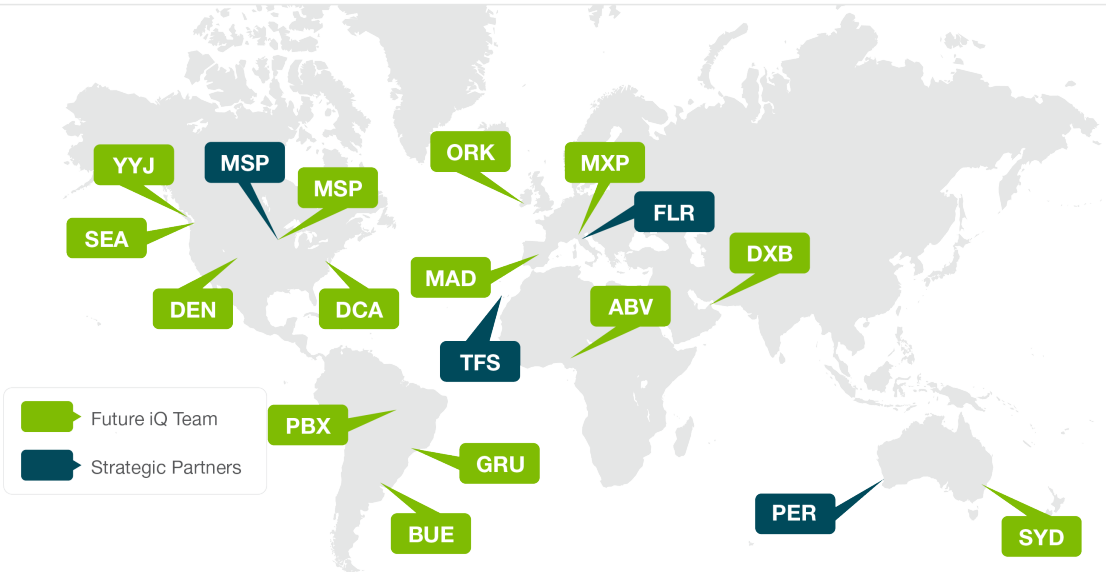
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# 1.0 Qualifications of the Consultant

## 1.2 Firm Background – About Future iQ

Future iQ is a global research and consulting company specializing in visioning and planning for regions, towns, communities, and industries. Founded in 2003, Future iQ’s global footprint brings a broad perspective and delivers transformational customized solutions to local environments. Future iQ’s clients span North America, Europe and Australia. Future iQ works across cultures, sectors and languages to shape unique and effective planning solutions for each of our clients. The Team assigned to this project has extensive experience in visioning and planning projects in the United States.



<p>Future iQ specializes in the following functional and sector areas:</p> <ul style="list-style-type: none"><li>• City, Urban and Regional Planning</li><li>• Economic and Workforce Development</li><li>• Defense Sector Engagement</li><li>• Organizational and Corporate Planning</li><li>• Non-profit Strategic Planning</li><li>• Tourism Industry Planning and Analysis</li></ul>	<p>Future iQ’s specialized methodology includes:</p> <ul style="list-style-type: none"><li>• Strategic Planning and Visioning</li><li>• Stakeholder Engagement</li><li>• Network and Supply Chain Mapping</li><li>• Data Visualization</li><li>• The Future Game</li><li>• Customized Foresight Research</li></ul>
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For more information, please visit Future iQ’s website at: <http://future-iq.com>

## 1.2 Proposed Project Team Members

The proposed client-facing Future iQ team has significant experience working on visioning and planning projects. We recognize that this project requires significant periods for intensive workloads and our team availability will allow sufficient team resources to be deployed, both on-site and for data analysis and report preparation. If Future iQ is selected to pursue Phase 2 of this project, Future iQ proposes to partner with the firm of Jon Stover & Associates (JS&A). The combined skillsets will bring significant strategic and small area planning, economic development, downtown planning, urban design and engagement experience to support the outcomes necessary to produce Falmouth’s Comprehensive Plan Update. The proposed team members are an experienced and reliable team, with a complementary mix of required skills in:

- Highly developed critical thinking capacity in the areas of visioning and strategic planning, organization design, and collaboration building
- Knowledge and experience with municipalities, corporations, regional entities and non-profit organizations
- Detailed practical experience in research, stakeholder engagement, economic and data analysis and data visualization
- Project management and stakeholder workshop facilitation, including extensive experience in visioning, economic and workforce development, industry cluster development, economic analysis and impacts research

All team members are confirmed to be available for the time frames and delivery as outlined in this response and will be directly accountable to Project Director David Beurle, CEO, Future iQ.

### Future iQ Team for Phase 1:

Team Member	Title	Role
David Beurle	CEO, Future iQ, Inc.	Project Director, Facilitation, Strategy Development
Heather Branigin	VP, Foresight Research	Research, Strategy Development, Engagement, Writing
Walter Paixao-Cortes	Data Engineer	Data Analysis and Visualization
Tobiloba Adaramati	Data Analyst	Data Analysis, Benchmark
Marc Rassel	Creative Director	Report Design

### Additional Team Members for Phase 2:

Team Member	Title	Role
Jon Stover	Managing Partner, Jon Stover and Associates	Lead Planner, Economic and Impact Analysis
Leslie Deacon, AICP	Project Manager, Jon Stover and Associates	Physical Planning, Economic Analysis, Community Development
Aaron King	Consultant, Jon Stover and Associates	Market Analysis, Development Feasibility
Johanna Hoffman	Sr. Foresight and Planning Specialist, Future iQ	Urban Design and Environmental Planning, Engagement

**Please see Appendices A and B for additional information on the firm of JS&A.**

## 1.2.1 Project Director, David Beurle, CEO, Future iQ

### RÉSUMÉ



#### DAVID BEURLE

david@future-iq.com

#### EDUCATION

Bachelor Degree in Agricultural Science, University of Sydney, 1984

#### EMPLOYMENT

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

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

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

#### PHILANTHROPIC WORK

Board Director, Western Australian Community Foundation, 2003-2005

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



### DAVID BEURLE, *B.SC. AGR*

*C.E.O. FUTURE IQ*

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

#### RECENT PROJECT EXPERIENCE

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

#### RECENT PUBLICATIONS

- The Future of Urban Living, 2019
- Future of Tourism, 2018
- The Next Industrial Revolution, 2018
- The Future of Midwest Agriculture, 2017 - 2018
- The Future of Manufacturing, 2016
- The Future of Food, 2016
- Economics of Collaboration, 2015
- Cities of the Future, 2015
- Building Sustainable Regional Communities, Windsor Castle, UK, 2012
- The Futures Game: A Scenario game Workshop Package to Engage Future Thinking, 2009
- Development of a Process to Turn Plausible Scenarios into On-Ground Action, 2009

## 1.2.2 Heather Branigin, Vice President, Foresight Research

### RÉSUMÉ



#### EDUCATION

Master of Arts in Teaching  
Secondary Level, Social Studies  
University of St. Thomas, MN

Bachelor of Arts in Political Science/  
International Relations  
Advanced Language Certificate: French  
Literature  
Carleton College, MN

Honours Degree, Neuchâtel Jr. College  
Neuchâtel, Switzerland

#### EMPLOYMENT

Vice President, Foresight Research,  
Future iQ, 2016-present

City of Edina, MN, 2013-2016

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

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

#### PHILANTHROPIC WORK

Bd. Member, Caring for Cats, present

Vol Judge, Future City Comp., 2017

Adv. Council Member, UNA-MN  
2014-present

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



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

#### VICE PRESIDENT, FORESIGHT RESEARCH

Heather began work with Future iQ in 2015 as primary researcher and author of Future iQ's foresight publication *The Future of Food*, and recently co-authored *The Future of Urban Living* and *The Next Industrial Revolution*. She has extensive experience in local government and the nonprofit sector, and is an accomplished project manager and research analyst. Heather has a well-developed ability to assimilate information into thoughtful and coherent writing. She applies the integration of future trends, data analysis and public engagement into implementable strategy development for clients. Through her work, Heather seeks to provide that critical resourceful guidance needed to empower communities and organizations to make decisions that build sustainability and resiliency as they face a future of accelerations and change. Originally from Canada, Heather has pursued her international interests through her philanthropic work with the United Nations Association of Minnesota.

#### RECENT PROJECT EXPERIENCE

- Kinship Fellows and Food:Land:Opportunity Grantees Summit, Chicago, IL, 2019-Present
- City of Trotwood Organizational Strategic Plan, OH, 2019-Present
- New North Business Intelligence Strategic Action Plan, WI (2019)
- New England Collaborative, DoD-OEA (2019)
- City of Mitchell Community Vision and Action Plan, SD, 2019-Present
- Future of Urban Living Global Consultation at Windsor Castle, UK, 2018
- CEDA, ID, 2019
- Sustainable Materials Management - Vision for Iowa, Iowa DNR, 2018-Present
- Tillamook County Strategic Vision and Action Plan, OR, 2018-2019
- ECC Medical/Well-Being Strategic Marketing Plan and Econ Dev Plan, MN, 2016-2019
- NADO, Washington, D.C., 2018-2019
- Coppell Vision 2040, Coppell, TX, 2018-2019
- City of San Diego, OEA Grant Facilitation, San Diego, CA, 2016-2019
- Snohomish County Regional Tourism Destination Development, WA, 2018
- McHenry County College, Crystal Lake, IL, 2018
- Rural Community Assistance Partnership, Washington, D.C., 2018
- Wayzata Community Vision, MN, 2017-2018
- NHADEC, NH, 2017-2018
- Waseca Vision 2030, MN, 2017-2018
- Edina Nodes and Modes Bridging Sessions, Edina, MN 2017
- Scott County Visioning and Scenario Planning, MN, 2017
- CAP-HC Vision and Strategic Action Plan, St. Louis Park, MN 2017
- Task Force LIMA Defense Initiative, Allen County, OH, 2016-2017
- University of Minnesota, Future of Midwest Agriculture, MN, 2016-2017
- Town of Hilton Head Island Vision and Strategic Action Plan, SC, 2016-2017
- City of Edina, Vision Edina, MN, 2014-2015

#### RELEVANT PUBLICATIONS

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

#### HEATHER BRANIGIN

heather@future-iq.com

## 1.2.3 Walter Paixao-Cortes, Data Engineer

### RÉSUMÉ



#### EDUCATION

Doctorate in Computer Science (Bioinformatics/  
Natural Language Processing)

Pontifical Catholic University of Rio Grande do  
Sul, 2015 to present

Masters Degree in Computer Science  
(Bioinformatics)

Pontifical Catholic University of Rio Grande do  
Sul 2013 – 2015

Bachelors Degree in Computer Science  
Pontifical Catholic University of Rio Grande do  
Sul, 1995 – 2002

#### EMPLOYMENT

Data Engineer – Future IQ (2017 – present)

Senior Software Engineer – Dell Computers,  
Brazil (2000 – present)

Software Engineer – Accenture, Brazil (2003 –  
2005)

### WALTER R. PAIXÃO-CÔRTEES, MA, BA

DATA ENGINEER, FUTURE IQ

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

#### RECENT PROJECT EXPERIENCE

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

#### WALTER R. PAIXÃO-CÔRTEES

walter@future-iq.com



## 1.2.4 Tobiloba Adaramati, Data Analyst

### RÉSUMÉ



#### EDUCATION

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

#### EMPLOYMENT

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

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

#### *Data Analyst*

Tobiloba Adaramati is a mathematician who sees the beauty in data. She is an expert in data processing, opinion mining, sentiment and reputation analysis. Through her unique perspective, Tobiloba sees each data point as a unique part of a puzzle which put together correctly, creates a clear picture. She uses various forms of data to provide valuable insights and reveal underlying trends. Her background includes a first-class degree in mathematics and experience providing monitoring and evaluation services for international development programs. Tobiloba has worked with Future iQ since 2017, providing data and analytics expertise.

#### RECENT PROJECT EXPERIENCE

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

#### RELEVANT PUBLICATIONS

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

#### TOBILOBA ADARAMATI

tobiloba@future-iq.com

## 1.2.5 Marc Rassel, Creative Director

### RÉSUMÉ



#### MARC RASSEL

marc@future-iq.com

#### EDUCATION

Bachelor of Fine Arts, Graphic Design,  
University of Wisconsin–Stout, 2007

Wisconsin State Certificate,  
Printing and Publishing, Fox Valley  
Technical College, 2002

#### EMPLOYMENT AND ASSOCIATIONS

Creative Director, Future iQ,  
2012 – Present

Owner and Creative Director,  
Align Multimedia, 2012 – Present

Creative Director - Print Advertising,  
Menard, Inc., 2007 - 2011

Board of Directors, Rifle Farmers Market,  
Rifle, Colorado, 2014 - 2018



### MARC RASSEL, B.F.A.

#### CREATIVE DIRECTOR

Marc is an accomplished design and marketing professional who has worked across many different industry verticals over the past 15 years and brings a multidisciplinary approach to design and marketing. He co-founded Align Multimedia in 2012 and has served as its Creative Director since the company started. He has helped numerous organizations grow and expand their reach with multi-channel marketing across traditional, digital, and emerging media. With an academic background in graphic design and psychology, he has studied the relationships between design and human behavior, which has allowed him to develop a keen sense of how design can influence and often create a desired reaction. With over 15 years of experience in the advertising and printing industries, Marc has worked in nearly all areas from concept and planning through production and delivery to help organizations realize increased efficiencies in production and enhanced brand perception.

#### RECENT PROJECT EXPERIENCE

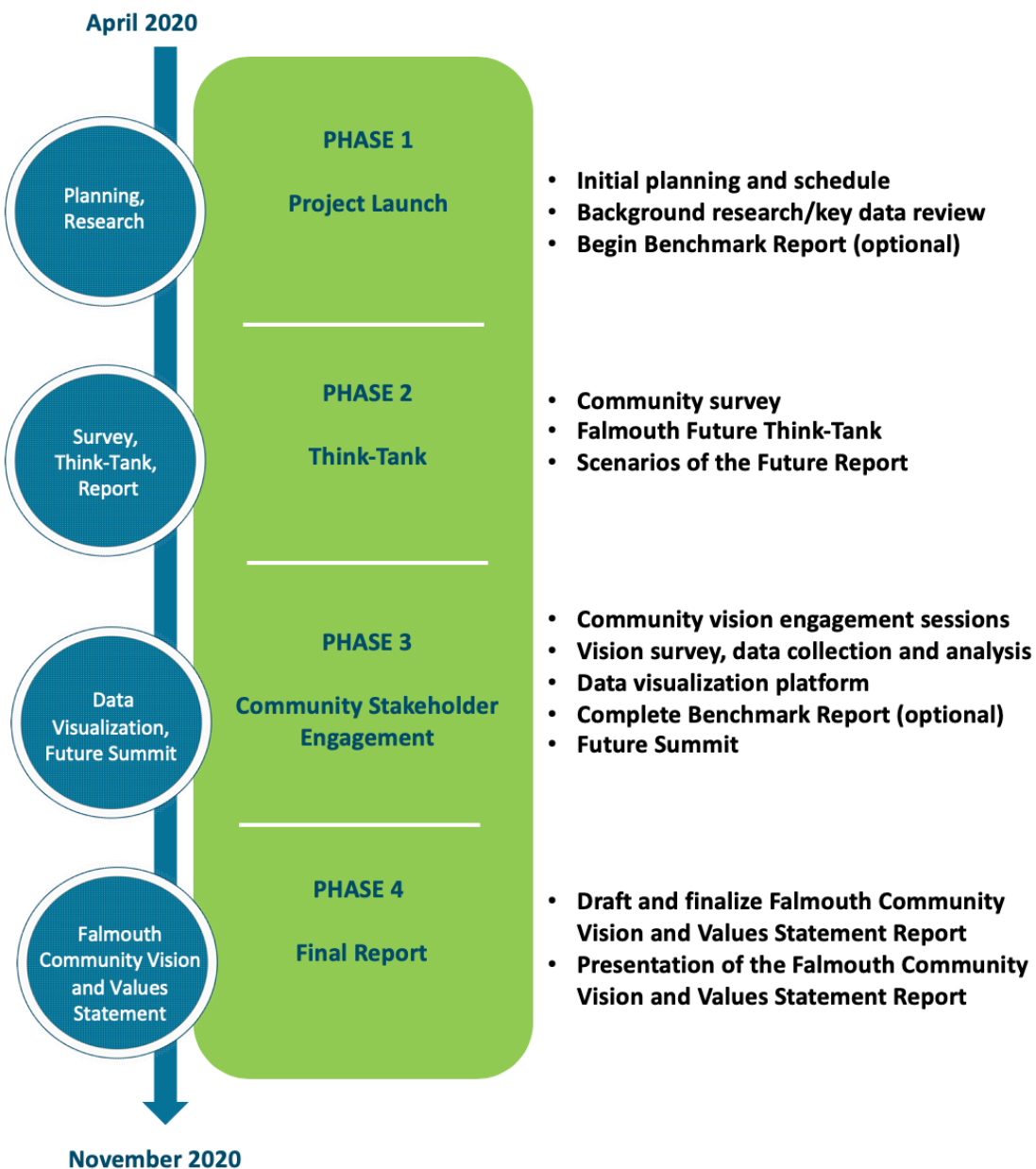
- City of Smithville Strategic Planning, Missouri, 2019
- Clearwater Economic Development Association, ID, 2019
- ECC Medical/Well-Being Strategic Marketing Plan and Economic Development Plan, MN, 2016-2019
- National Association of Development Organizations, Washington, D.C., 2018-2019
- Tillamook County Strategic Vision and Action Plan, OR, 2018-2019
- Sustainable Materials Management - Vision for Iowa, Iowa DNR, 2018-2019
- Coppell Vision 2040, Coppell, TX, 2018-2019
- City of Mitchell Community Vision and Action Plan, SD, 2019
- Park City Community Vision and Strategic Action Plan, UT, 2019
- City of San Diego, OEA Grant Facilitation, San Diego, CA, 2016-2019
- Snohomish County Regional Tourism Destination Development, WA, 2018
- McHenry County College, Crystal Lake, IL, 2018
- Rural Community Assistance Partnership, Washington, D.C., 2018
- The Future of Urban Living consultation, Windsor Castle, UK, 2018
- The Future of Tourism, 2018
- City of Wayzata, Minnesota, US, 2017-2018
- National Congress of American Indians, Future Game development, 2016-18
- The Next Industrial Revolution, 2017
- Greater Lima Region Stakeholder Eco-System Analysis, 2017
- Edina Industry Cluster and Economic Impact Analysis, 2017
- Economic Development in Edina Stakeholder Engagement Analysis, 2017
- Global Food Industry Scenarios of the Future Stakeholder Survey Report, 2017
- Moosehead Lake Regional Master Plan, Maine, US, 2016-2017
- An Innovation Framework for the Greater Lima Region, 2016
- The Future of Manufacturing, 2016
- The Future of Food, 2016
- Griffith Foods, Chicago, USA, 2016
- Columbia River Gorge, Oregon, US, 2015-2016
- Oregon Regional Tourism Planning, US, 2015-2016
- Task Force LIMA, Ohio, USA, 2015-16
- Nebraska Views of the Future, USA, 2015-2016
- Vision Edina, Minnesota, USA, 2014-2015
- Agriparco Montespertoli, Tuscany, Italy, 2014
- Texarkana Defense Project, Texas, USA, 2015
- Economics of Collaboration, 2015
- Mediterranean Sea – Ports Project, Italy/France, 2015
- Global Think Tank, Windsor Castle, UK, 2012
- Fox Valley, Wisconsin, USA, 2014-2015
- Cities of the Future, 2014-2015
- Kewaunee Regional Planning, Wisconsin, USA, 2013
- Mountains of Leon, Northern Spain, 2014
- Mount Pierre Station, Western Australia, 2013
- Steering it Forward, Nevada, USA, 2011-2012
- The Future Game – Corporate Edition, 2012 – 2016
- The Netherlands Study Tour, 2012
- Volunteer Alberta Network Mapping, Alberta, Canada, 2014
- Savoir Project, Italy/France, 2015
- Future Makers, 2012-2015



## 2.0 Statement of Understanding

The proposed project plan is implemented in 4 phases that build momentum around an aligned vision and values for the Town of Falmouth for the next 10-20 years. The Community Vision and Values Statement is intended to be comprehensive and implementable. It will identify future opportunities and align resources for development as Falmouth prepares to update its 2013 Comprehensive Plan. The scope of services for Phase 1 outlined in the RFQ will be included in the proposed project plan and incorporated into the 4 phases outlined below.

### Proposed Project Plan





## 2.1 Phase 1: Project Launch

This project will begin with calls between Future iQ team members and Falmouth Town Staff to establish a final work program and schedule specifying the number and type of planned meetings, engagement activities and deliverables to occur throughout the project. Significant background research including exploration of existing Town and regional documents will be undertaken to understand those strategic directions already established and to identify progress made towards meeting those objectives.

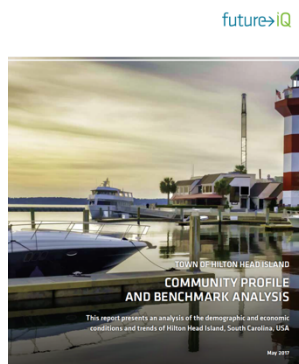


Future iQ recommends adding a Benchmark report to the project's scope of work. The Benchmark Report would expand on current data by providing an up-to-date community profile in conjunction with nationwide community comparisons across common dimensions. The preliminary information from the background research and Benchmark Report, along with input from Town leadership will be used to develop the Community survey that will be distributed to all community stakeholders participating in the Falmouth Future Think-Tank (Section 2.2).

To kick off the project's visioning process with the public, Future iQ will work closely with Town Staff to organize a public 'Launch'. This is usually a 1-1 ½ hour social gathering that introduces the Consultant Team to the community and gives Town leadership an opportunity to introduce the project and share their aspirations for the project and its outcomes.

### Deliverables from Phase 1 will include:

- Initial planning and project schedule
- Begin Benchmark Report (optional)
- Public Launch of the visioning project



## 2.2 Phase 2: Think-Tank

Future iQ specializes in studying and understanding larger emergent trends and influences that are reshaping cities, communities, organizations and regions. This future-oriented lens guides Phase Two as it creates the building blocks of a preferred vision for the future using a scenario-based visioning methodology. Using trend research, local knowledge and expectations about Falmouth, this methodology will enable community stakeholders to explore the impacts and consequences of a range of different future paths as they participate in a **Think-Tank**.



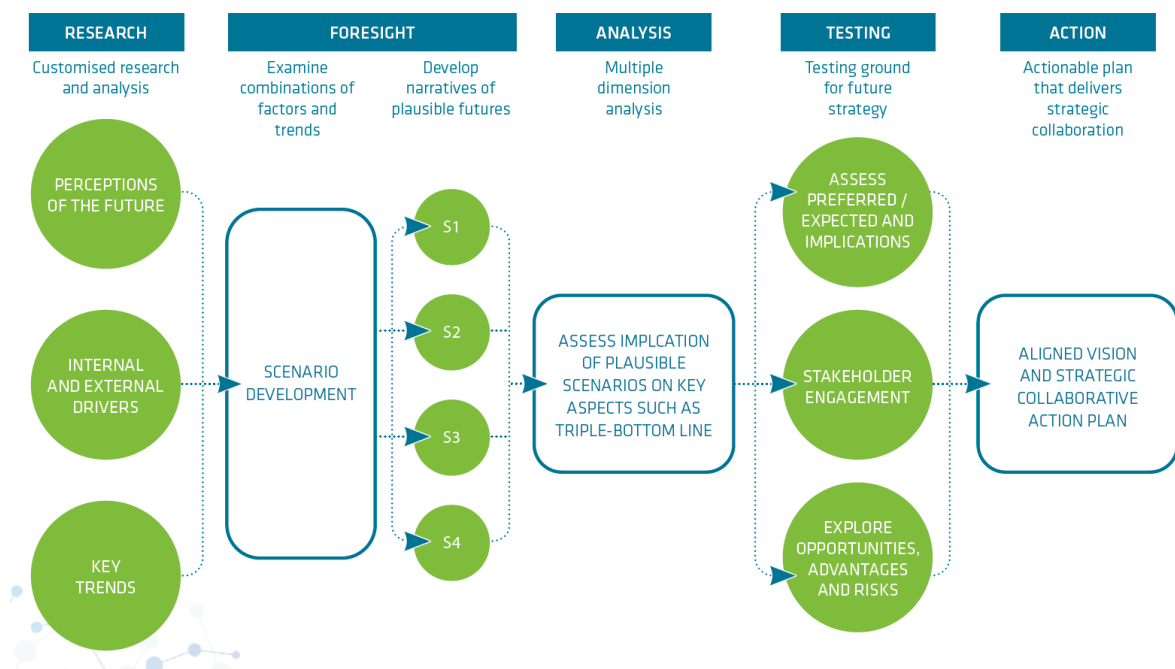
The scenario-planning process creates scenarios that are not predictions but are a way of exploring plausible futures. Key aspects and features of the approach include:

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

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

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

Below is the visual outline of how Future iQ’s scenario-based visioning and planning process works.



### How a Think-Tank Works

The Think-Tank process helps to define a broad vision, goals and directions. It is conducted as a highly participatory 4 to 6-hour workshop (sometimes held over two evenings) that produces a preferred future scenario validated by the completion of individual participant ‘Heat Maps’. The Heat Map results will be incorporated into Falmouth’s community vision, revealing consensus on a preferred future or vision for the City. For Falmouth, the scenario based Future Think-Tank is a tool to gain better understanding of community stakeholder priorities, goals and values to create effective actions for regional resource allocation. This process helps community stakeholders explore and understand emergent trends, and their potential implications across Falmouth. A range of plausible future scenarios are developed that act as a testing ground to assess resilience and consequences.

The Think-Tank provides an important opportunity for Falmouth’s stakeholders to take a ‘deep dive’ into the future.

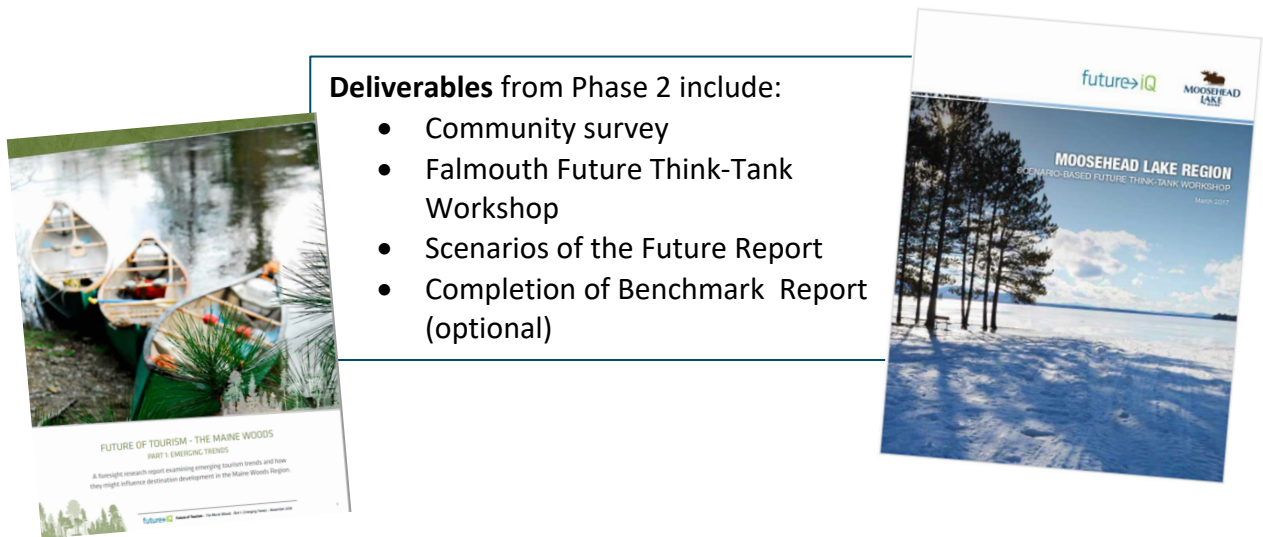
For Falmouth, we believe this process is trying to answer important questions such as:

- What should Falmouth become?
- What makes Falmouth unique and special and how can the Town use these characteristics to prepare for the future?
- How will community stakeholder preferences fit into this vision?
- How should funds be invested and leveraged to build resiliency for the Town?

In addition, the Think-Tank process can further examine circumstances including:

- What are the specific strategic gap and growth areas for Falmouth and does previous planning address those areas?
- How may financial/budgetary issues on the State level impact Falmouth and how can the region prepare for potential budget challenges?
- Where does Falmouth fit into the world, and what are its unique competitive strengths?
- How does Falmouth anticipate and take advantage of emerging trends in the economy, Country, and aspirations of community stakeholders?
- What unique hurdles might Falmouth face, and how do we build collaborative approaches and structures to ensure continued successful programs and services?
- Where is there opportunity or need to evolve or change? Where is there an appetite for change, and where might there be resistance to change?
- What is the story Falmouth community stakeholders want to tell about themselves and what do they want the Town to be in the future?

The methodology being proposed is more in-depth than a SWOT analysis and will allow community stakeholders to tackle these questions in an engaging and thought-provoking manner. This will then lead to the clarification of priorities and core values that will define the Falmouth Community Vision.



**Deliverables from Phase 2 include:**

- Community survey
- Falmouth Future Think-Tank Workshop
- Scenarios of the Future Report
- Completion of Benchmark Report (optional)





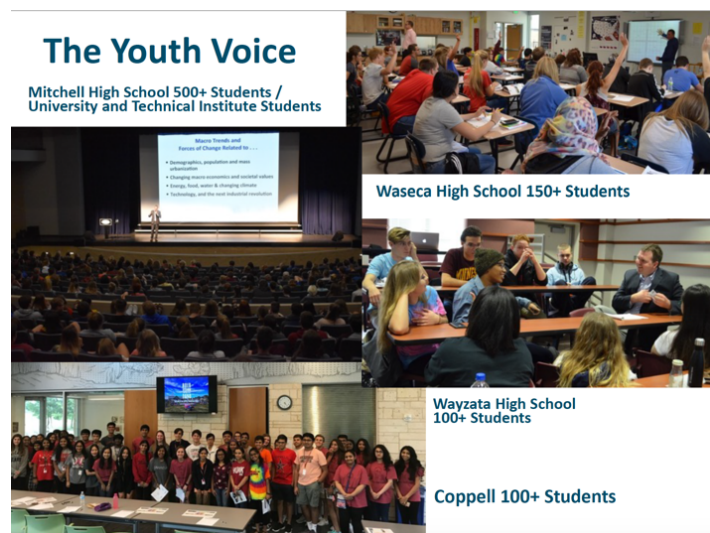
## 2.3 Phase 3: Community Stakeholder Engagement

Engagement is a cornerstone of Future iQ’s visioning methodology. Key to effective community engagement is building momentum and excitement around the vision as it is created. Future iQ uses a wide variety of engagement methods to build this momentum – from Launches, Think-Tanks, targeted workshops, interviews, focus groups, summits and surveys that reach all corners of the community. Future iQ goes deep and wide to gather input, making a specific effort to engage those community members that typically are not engaged in civic or community dialogue.

Following the Think-Tank, Future iQ will conduct a full week of visioning workshops (2-3 per day), conduct interviews, and promote an online Vision survey to broaden the reach and solicit feedback. The scope and various means of this engagement will be developed in close consultation with Town leadership at the start of the project. Groups included in the engagement phase include stakeholders such as:

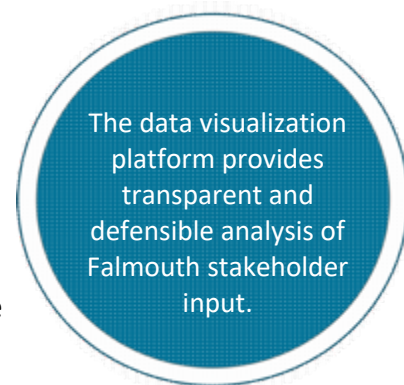
- Community, recreation and sporting groups
- Business and industry groups
- University students
- Elected officials
- Open community meetings
- Youth and high school sessions

After the engagement week, Future iQ will convene a **Future Summit**. This group will revisit the first Think-Tank and incorporate the results from the expanded engagement to validate the engagement results and develop the Community Vision and Values Statement. The Future Summit serves to foster cohesion and alignment by giving participants the opportunity to validate the final vision, strategic direction and values for the community. This support will be very important to facilitate resource and Town-wide alignment for the upcoming comprehensive plan.



## Data Visualization is Key to Understanding Community Stakeholders

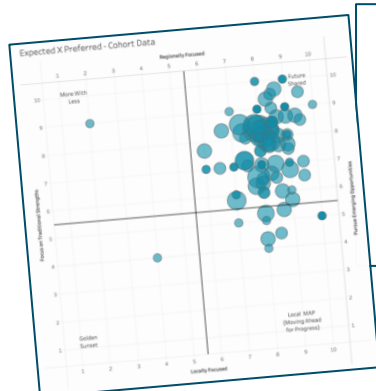
Data collection from surveys provides an inclusive process and a comprehensive understanding of stakeholder views and where points of consensus lie. Future iQ use an online Lab Portal to collect and display Falmouth community stakeholder survey results. Please see <http://lab.future-iq.com>. This approach provides a fun and interactive way to give transparent feedback to participants while at the same time exploring issues and views across the Town. The Lab also serves as a central location where community stakeholders can go to find updated project information and notices.



Future iQ developed the Lab Portal platform to provide a people-focused, data-driven approach to strategic planning and key issue analysis. The following image shows an example of the 'point of consensus' in a sample project. The dots represent groups of stakeholders and where their preferred future was located relative to a range of choices within the scenario matrix. The point of consensus will move depending on the search filters selected, allowing for an engaging and interesting way to explore the various views of different cohorts and groups within the Town. For Falmouth, we would set filters based on profile questions such as age, length of time living or working in the Town, industry affiliation, etc.

## Measuring Effectiveness

Understanding and measuring progress in key performance areas will be an important part of implementing Falmouth's Community Vision and Values, especially in bridging to the upcoming comprehensive planning process. 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. In developing metrics, it is important to measure progress over time. By comparing progress of the action areas at different points in time, the metrics will give an indication of the trajectory of that item. Phase 3 of this project plan includes the development of measurements to support periodic review and adjustment of the vision and core values over time.



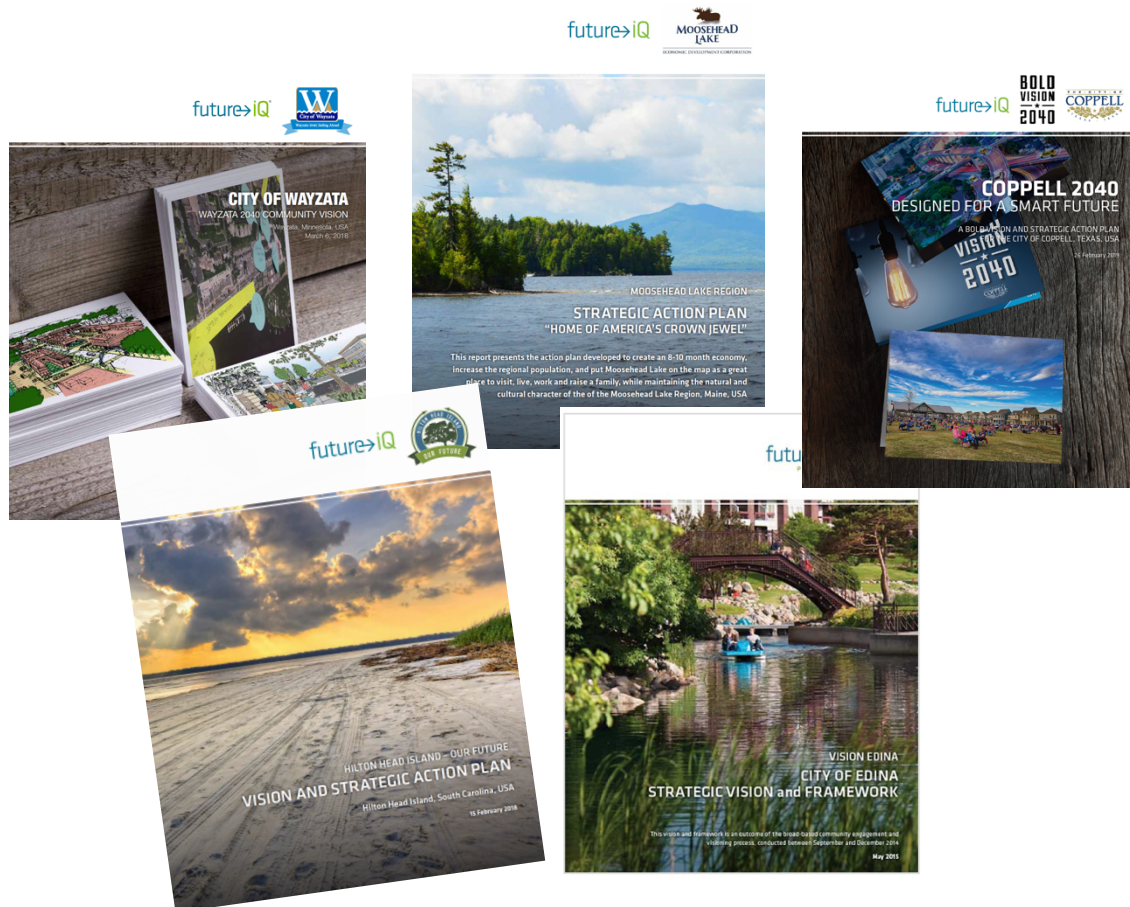
- Deliverables** for Phase 3 include:
- Vision workshops and stakeholder interviews
  - Vision survey, data collection and analysis
  - Data visualization platform
  - Future Summit to validate vision and develop community values

## 2.4 Phase 4: Final Report

At this point, Future iQ will draw together all information to craft the vision framework for the Town of Falmouth. This will involve careful synthesis of all research, engagement results, reports and analysis into a first draft of Falmouth’s Community Vision and Values Statement Report. Future iQ’s final steps in the visioning process incorporates the accumulated input on the draft framework from elected officials, community stakeholders and Town leadership. Future iQ will use this opportunity to work with Town leadership to plan for sustainability by developing realistic, achievable goals. This would include considerations for the comprehensive planning process. The final Falmouth Community Vision and Value Statement Report will be presented by the Project Director to the Falmouth Town Council and community stakeholders as determined at the initial planning meetings.

### Deliverables for Phase 4 include:

- Final draft of the Falmouth Community Vision and Values Statement and delivery of .pdf report
- **Final Community Presentation**

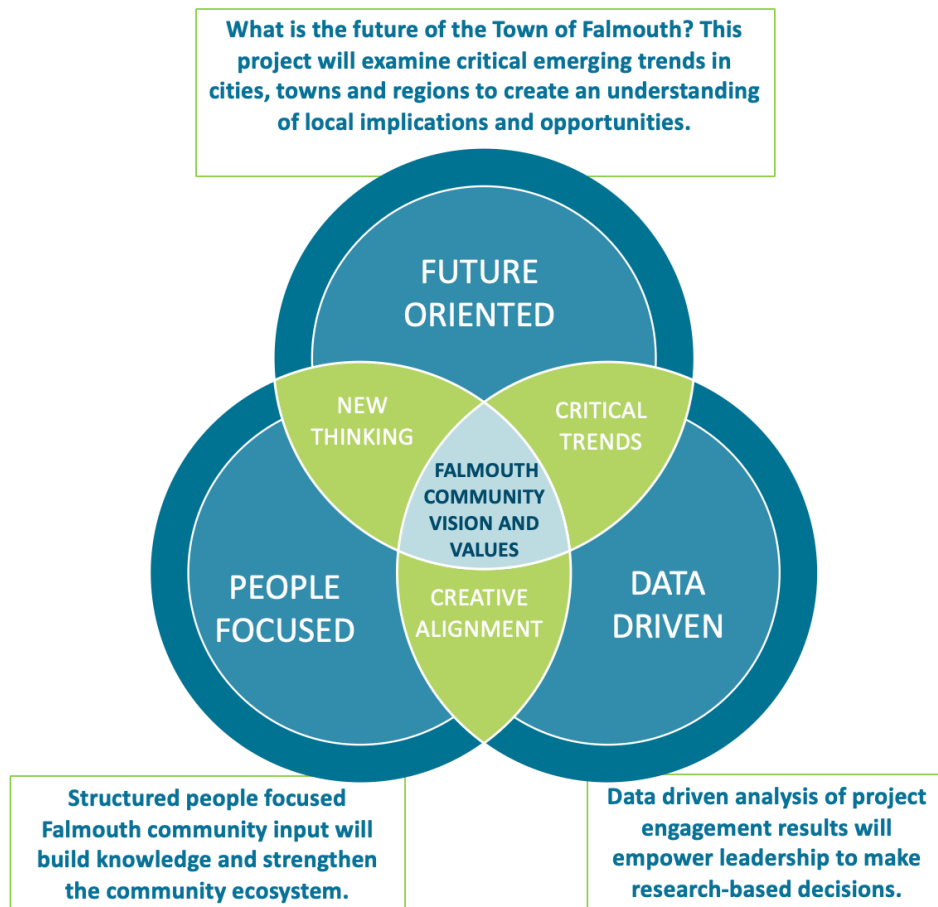


### 3.0 Consultant’s Considerations

#### 3.1 Proposed Methodology

Future iQ brings a global perspective to strategic visioning that is invaluable to local interests. For the Town of Falmouth, this means access to a wealth of knowledge and experience in the development of visioning and strategic planning for cities, counties, regions, nonprofits and global corporations. Future iQ will use this experience to guide and inform this project and will work with Town leadership to develop comprehensive, future-oriented, sustainable and implementable recommendations and goals to support Falmouth’s Community Vision and Values Statement. These strategies will balance priorities across the important dimensions specific to Falmouth and incorporate global and local best practices.

Future iQ’s strategic planning methodology is based on three primary principles. It is Future Oriented, Data Driven and People Focused. The ‘future orientation’ is particularly important to take account of rapidly emerging social and technological trends. The ‘data driven’ ensures the plan is built on solid research, public input and information. The ‘people focused’ is important to build support for the Vision and values for the Town, and to harness the best possible input into the visioning process.





### 3.1.1 Future Oriented Research

Future iQ produces global foresight publications and research to help our clients build understanding about important future trends impacting cities, regions, communities and industries. This insight helps stakeholders to effectively plan for the future. During this project, Future iQ will draw on their research to present customized trend analysis and information most relevant to the Town of Falmouth. This will help community members explore new thinking and ideas, and critically examine emerging challenges and opportunities.



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



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



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



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



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



**Global Consultations – Windsor Castle (2012 and 2018)**  
In partnership with St. George’s house, Windsor Castle, Future iQ explored the challenges of building sustainable communities (2012) and explored the future of urban living (2018).



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

### 3.1.2 People Focused Engagement

Future iQ's people-focused engagement process facilitates real conversations that get to the heart of the matter and builds consensus. From large-scale participatory industry forums to targeted focus groups and online survey mechanisms, Future iQ's wide range of engagement methods encourage people to be part of the decision-making, visioning and planning process. This hands-on engagement will be a very important feature of the proposed engagement aspects of this project.



#### Think-Tank – Scenario Planning

The Think-Tank is an innovative approach to stakeholder engagement. It focuses on scenario-based strategic planning and stresses the role of future-thinking to identify shared interests and common concerns.



#### Community and Stakeholder Outreach

Throughout the planning process Future iQ engages a broad cross section of stakeholder cohorts using meaningful and inclusive engagement methods.



#### Large Scale Stakeholder Sessions

Large scale groups build momentum and community stakeholder enthusiasm for the planning process.



#### Focus Groups and Planning Workshops

Targeted focus group sessions and customized vision workshops deliver invaluable qualitative and quantitative stakeholder engagement insights.



#### Simulation Learning *Future Game*®

The Future Game is a planning simulation tool provides stakeholders with a dynamic gaming experience rewarding collaboration, innovation, and teamwork.



#### Student Sessions The Youth Voice

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

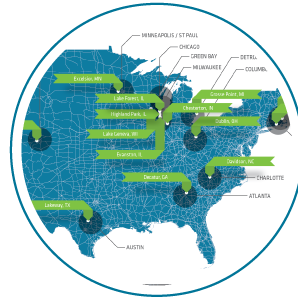
### 3.1.3 Data Driven Methodology

Future iQ specializes in sophisticated data collection and analysis. Using our innovative Future iQ Lab Portal, survey data collected from a wide range of cohorts will be presented in a way that allows Falmouth community stakeholders to see how their personal input helps shape the overall vision and comprehensive planning.



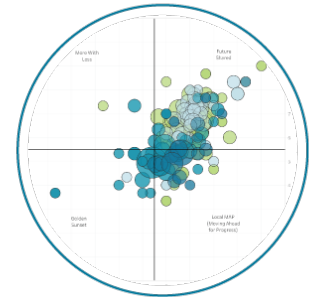
#### Stakeholder Surveys

Comprehensive stakeholder data, presented in a transparent and interactive manner, can help build rapid alignment around key points of consensus. This enables organizational leadership to make decisions and planning actions that are defensible and supported by the voices of all stakeholders.



#### Best Practices Benchmarking

Multi-dimensional benchmark studies and analyses of cohort communities provide valuable insight to clients.



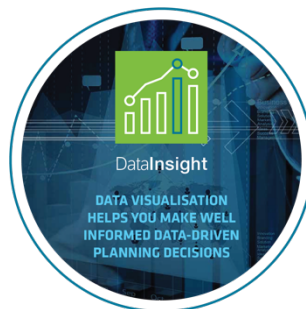
#### Data Visualization

Survey results will be collected and presented in an innovative and interactive data visualization platform. This will allow stakeholders to examine the data collected from surveys themselves, explore levels of alignment or divergence around key topics, and selectively filter to view perspectives from their own sector, or other profile category.



#### Lab Portal

A customized Lab Portal gives clients a centralized location for project information, engagement dates, reports, and survey result data visualization.



#### Data Insights

Key data insights and analysis throughout the visioning process provide clients a glimpse into community sentiment and priorities.



#### Future Insight

Future insight and trend analysis during strategy development give clients the opportunity to consider the impacts and implications of future trends on current local planning.

### 3.2 Proposed Timeline

The following chart outlines key stages and suggested periods of activities. This timeline reflects the relative emphasis of activity and is flexible depending on the needs of the Town of Falmouth. Work on key deliverables will occur in parallel allowing the stages to be completed within the project timeline.

Key Phases	Key Deliverables	A	M	J	J	A	S	O	N
<b>Phase 1:</b> Project Launch	Initial planning and schedule	■	■						
	Background research/key data review	■	■						
	Begin Benchmark Report (optional)	■	■	■					
<b>Phase 2:</b> Think-Tank	Community survey		■	■					
	Falmouth Future Think-Tank Workshop			■					
	Scenarios of the Future Report			■	■				
<b>Phase 3:</b> Community Stakeholder Engagement	Complete Benchmark Report (Optional)				■				
	Vision survey, data collection and analysis				■	■	■		
	Data visualization platform					■	■		
	Community vision engagement sessions (one week)					■	■		
	Future Summit						■		
<b>Phase 4:</b> Final Report	Draft and Finalize Falmouth Community Vision and Values Statement						■	■	
	Presentation of the Falmouth Community Vision and Values Statement Report							■	■

Please note that Future iQ would like to be considered for the potential additional scope of work (Phase 2) of this project. Our most recent example of similar work involves the Comprehensive Plan we are creating with the City of Smithville, Missouri. This immediately followed the Community Vision and Strategic Action Plan Future iQ facilitated for Smithville in 2019.

### 3.3 Proposed Budget

Future iQ operates on an all-inclusive, fixed-price delivery. The fees below include all travel and accommodation costs and overheads for the Project Director and staff. Future iQ assumes that the Town of Falmouth will provide venues for engagement sessions and presentations, as required.

Key Phases	Key Components	Proposed Costs	Optional Costs
<b>Phase 1:</b> Project Launch	<ul style="list-style-type: none"> <li>Initial planning and schedule</li> <li>Background research/key data review</li> <li>Begin Benchmark Report (optional)</li> </ul>	\$2,000 \$2,000	\$2,500
<b>Phase 2:</b> Think-Tank	<ul style="list-style-type: none"> <li>Community survey</li> <li>Falmouth Future Think-Tank Workshop</li> <li>Scenarios of the Future Report</li> </ul>	\$2,500 \$8,000 \$5,000	
<b>Phase 3:</b> Community Stakeholder Engagement	<ul style="list-style-type: none"> <li>Complete Benchmark Report</li> <li>Community vision engagement sessions (1 week)</li> <li>Vision survey, data collection and analysis</li> <li>Data visualization platform</li> <li>Future Summit</li> </ul>	\$15,000 \$3,000 \$3,000 \$5,000	\$2,500
<b>Phase 4:</b> Final Report	<ul style="list-style-type: none"> <li>Draft and finalize Falmouth Community Vision and Values Statement document</li> <li>Presentation of the Falmouth Community Vision and Values Statement</li> </ul>	\$10,000 \$2,500	
<b>Total Fees &amp; Expenses</b>	<b>FIXED PRICE PROPOSAL</b>	<b>\$58,000</b>	<b>\$63,000</b>

**Proposed payment schedule:**

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

Please note that Future iQ’s fees and project plan are flexible and easily scalable depending on the needs of the Town of Falmouth.



## 4.0 Similar Projects Completed

### 4.1 Examples of Similar Visioning and Strategic Planning Projects

Future iQ has significant experience in strategic visioning and planning for organizations, towns, municipalities, corporations and regions. Below are links to examples of recent strategic visioning and planning projects and their accompanying reports. For additional detailed project descriptions, please visit: <https://future-iq.com/featured-projects/>

- Moosehead Lake Region Economic Development Corporation, ME, Strategic Action Plan (2016-2017) <http://future-iq.com/project/moosehead-lake-region-maine-usa-2016-17/>
- Envision Bemidji 2030, MN, Community Vision and Strategic Action Plan (2020-present)
- City of Mitchell, SD, Community Vision and Strategic Action Plan (2019) <https://lab.future-iq.com/mitchell-forward-2040/>
- City of Smithville, MO, Community Vision and Strategic Action Plan (2019) <https://lab.future-iq.com/city-of-smithville/>
- Park City Vision 2020, UT, Community Vision and Action Plan (2019-present) <https://lab.future-iq.com/park-city-community-visioning-2020/>
- City of Trotwood, OH, Vision, Organizational Strategic Action Plan (2019) <https://lab.future-iq.com/city-of-trotwood-strategic-planning-project/>
- City of Coppell, TX, Community Vision and Strategic Action Plan (2018-2019) <https://lab.future-iq.com/coppell-vision-2040/>
- Town of Hilton Head Island, SC, Community Vision and Strategic Action Plan (2016-2018) <https://lab.future-iq.com/hhiourfuture/>
- B.E.S.T. of Waseca County, MN, Community Vision and Strategic Action Plan (2017-2018) <https://future-iq.com/project/waseca-county-minnesota-usa-2017/>
- City of Smithville, MO, Comprehensive Plan (2020-present) <https://lab.future-iq.com/city-of-smithville-comprehensive-planning-process-2020/launch-event/>
- North Tyrrhenian Sea Mediterranean Ports Project, Italy/France, Strategic Plan (2015) <http://future-iq.com/project/mediterranean-sea-ports-project/>
- Allen County, OH, Board Facilitation, Regional Collaborative Growth Plan (2015-2017) <http://future-iq.com/project/greater-lima-region-2016/>
- National Association of Development Organizations (NADO), D.C., Board Facilitation, Vision, Strategic Action Plan (2018-2019) <https://future-iq.com/project/u-s-midwest-agriculture-scenarios-future-2016-17/>
- New Hampshire Aerospace and Defense Consortium (NHADEC), Board Facilitation, Vision, Strategic Action Plan (2017-2018) <https://future-iq.com/project/aerospace-defense-export-consortium-strategy-development-new-hampshire-usa-2017/>
- Iowa Department of Natural Resources, IA, IDNR Vision for Iowa (2018-2019) <https://future-iq.com/project/iowa-department-of-natural-resources-iowa-usa-2019/>

## 4.2 Sample Similar Projects

Future iQ has significant experience in visioning, strategic planning and designing and facilitating Think-Tanks, Foresight Sessions, Board Retreats, Focus Groups and engagement consultations. Below are links to additional visioning and strategic planning projects as well as various types of facilitated workshop sessions.

- Bethel Area Tourism Development, ME (2019-2020) <https://future-iq.com/project/main-title-bethel-area-tourism-development-maine-usa-2019-20/>
- The Maine Woods – The Future of Tourism (2018-2019) <https://future-iq.com/project/maine-woods-usa-2018/>
- State of Vermont, VT, OEA Grant Management and Regional Collaboration (2019-present) <http://future-iq.com/project/new-england-regional-defense-industry-collaboration-usa-2019-20/>
- Kinship Foundation, IL, 3-Day Kinship Fellows and Food:Land:Opportunity Grantees Summit, Visioning and Knowledge Product (2019-present)
- City of San Diego, CA, DoD OEA Grant Facilitation, Vision and Strategic Roadmap (2016-2020) <http://future-iq.com/project/city-san-diego-california-usa-2016-17/>
- McHenry County College, IL, Board and Stakeholder Foresight Session and Report (2018) <https://future-iq.com/project/mchenry-county-college-crystal-lake-illinois-2018/>
- City of Edina, MN, Vision Edina and Bridging to Comprehensive Planning (2014-2017) <https://future-iq.com/project/vision-edina/>
- City of Wayzata, MN, Wayzata 2040 Community Vision (2017-2018) <http://future-iq.com/project/city-wayzata-minnesota-usa-2017/>
- University of Minnesota, MN, Future of Midwest Agriculture (2016-2017) <http://future-iq.com/project/u-s-midwest-agriculture-scenarios-future-2016-17/>
- Tillamook County, OR, Strategic Vision and Action Plan (2018-2019) <https://future-iq.com/project/tourism-investment-strategic-action-plan-project-oregon-usa/>
- Future of Urban Living Global Foresight Consultation, U.K., and Foresight Report (2018-2019) <https://future-iq.com/project/international-consultation-windsor-castle-uk-2018/>
- National Congress of American Indians, D.C., Visioning and Future Game Facilitation (2016-2018) <http://future-iq.com/project/national-congress-american-indians-usa-2016/>
- Griffith Foods, IL, Global Executive Think-Tank and The Future of Food Foresight Report (2016) <https://future-iq.com/project/griffith-foods-chicago-usa-2016/>
- Middle Georgia Regional Planning, GA, Regional Action Plan (2018) <http://future-iq.com/project/middle-georgia-economic-alliance-usa-2018/>
- North Oaks Home Owners' Association, MN, Board Facilitation and Community Survey Report (2019-present) <https://future-iq.com/project/north-oaks-home-owners-association-minnesota-usa-2019/>
- Community Action Partnership of Hennepin County, MN, Board Facilitation, Vision, Strategic Plan (2017) <http://future-iq.com/project/community-action-partnership-hennepin-county-minnesota-usa-2017/>

### 4.3 Sample Tourism Planning Projects

Future iQ has been engaged by multiple municipalities, regions and entities to facilitate tourism development in the United States, Europe, and in particular, Maine and Oregon. Below are sample projects with links to their project page descriptions.

- Bethel Area Tourism Development, ME (2019-2020) <https://future-iq.com/project/main-title-bethel-area-tourism-development-maine-usa-2019-20/>
- Rangely Lakes Tourism Destination Development (2019) <https://future-iq.com/project/rangeley-lakes-maine-usa-2019/>
- Maine Woods Tourism Development and The Future of Tourism – Maine Woods (2017-2018) <http://future-iq.com/project/maine-woods-usa-2018/>
- Moosehead Lake Region Economic Development Corporation, ME, Strategic Action Plan (2016-2017) <http://future-iq.com/project/moosehead-lake-region-maine-usa-2016-17/>
- Tillamook County Tourism Investment Strategic Vision and Action Plan, OR (2019-2020) <https://future-iq.com/project/tourism-investment-strategic-action-plan-project-oregon-usa/>
- Travel Oregon, North Coast Tourism Studio (2018-2019) <https://future-iq.com/project/north-coast-tourism-studio-oregon-usa-2018/>
- Medical/Well-Being Destination Strategic Marketing Plan, MN (2018-2019) <https://future-iq.com/project/medical-well-destination-strategic-marketing-plan-edina-minnesota-2018/>
- Snohomish County Regional Destination Development, WA (2017-2018) . <http://future-iq.com/project/snohomish-county-regional-destination-development-washington-usa/>
- Travel Oregon, Regional Tourism Planning (2015-2016) <https://future-iq.com/project/oregon-regional-tourism-planning-usa/>
- Travel Oregon, Columbia River Gorge (2015-2016) <https://future-iq.com/project/columbia-river-gorge-usa/>
- Travel Oregon, Rural Tourism Studios (2009-2017) <https://future-iq.com/project/rural-tourism-studio/>
- North Tyrrhenian Sea Mediterranean Ports Project, Italy/France (2015) <http://future-iq.com/project/mediterranean-sea-ports-project/>
- Agriparco Montespertoli, Italy, Agricultural Park Action Planning (2014) <http://future-iq.com/projects/scenario-planning-in-montespertoli-tuscany>
- Ireland National Tourism, Ireland, The Gathering Initiative (2013) <http://future-iq.com/project/the-gathering-tourism-initiative/>



## 5.0 References from Similar Projects

Below are recent similar project contacts that may be used as references for this project. All are aware that they may be contacted as references for Future iQ. Additional references may be provided as needed.

<p><b>Maine Woods Regional Tourism and Economic Development (2018-2019)</b> <a href="https://future-iq.com/project/maine-woods-usa-2018/">https://future-iq.com/project/maine-woods-usa-2018/</a> <b>Bethel Area Tourism Development, Maine (2019-2020)</b> State of Vermont, VT, OEA Grant Management and Regional Collaboration (2019-present) <a href="http://future-iq.com/project/new-england-regional-defense-industry-collaboration-usa-2019-20/">http://future-iq.com/project/new-england-regional-defense-industry-collaboration-usa-2019-20/</a></p>	<p>Mike Wilson Senior Program Director Northern Forest Center 131 Ocean Street South Portland, ME 04106 Tel: 207-767-9952 Email: <a href="mailto:mwilson@northernforest.org">mwilson@northernforest.org</a></p>
<p><b>Moosehead Lake Regional Plan, Maine (2016-2017)</b> <a href="http://future-iq.com/project/moosehead-lake-region-maine-usa-2016-17/">http://future-iq.com/project/moosehead-lake-region-maine-usa-2016-17/</a></p>	<p>Donna L. Moreland Destination Development Specialist Maine Office of Tourism 59 State House Station, Augusta, ME Tel: 207-624-9808 Email: <a href="mailto:Donna.Moreland@maine.gov">Donna.Moreland@maine.gov</a></p>
<p><b>City of Edina, Vision Edina (2014-2015)</b> <a href="https://future-iq.com/project/vision-edina/">https://future-iq.com/project/vision-edina/</a>; <b>Nodes and Modes, Minnesota (2017)</b> <a href="https://future-iq.com/project/nodes-modes-city-edina-usa-2017/">https://future-iq.com/project/nodes-modes-city-edina-usa-2017/</a></p>	<p>Scott Neal, City Manager City of Edina 4801 W. 50<sup>th</sup> Street Edina, MN 55424 Tel: 952-826-0401 Email: <a href="mailto:sneal@edinamn.gov">sneal@edinamn.gov</a></p>
<p><b>City of Mitchell, Forward 2040, Vision and Action Plan, South Dakota (2019)</b> <a href="https://lab.future-iq.com/mitchell-forward-2040/">https://lab.future-iq.com/mitchell-forward-2040/</a></p>	<p>Stephanie Ellwein City Administrator City of Mitchell 612 North Main Street, Mitchell, SD 57301 Tel: 605-995-8143 Email: <a href="mailto:sellwein@cityofmitchell.org">sellwein@cityofmitchell.org</a></p>
<p><b>Town of Hilton Head Island, Community Vision and Strategic Action Plan, South Carolina (2016-2018)</b> <a href="https://lab.future-iq.com/hhiourfuture/">https://lab.future-iq.com/hhiourfuture/</a></p>	<p>Jennifer Ray, ASLA Planning and Special Projects Manager Town of Hilton Head Island One Town Center Court, Hilton Head Island, SC Tel: 843-341-4665 Email: <a href="mailto:jenniferr@hiltonheadislandsc.gov">jenniferr@hiltonheadislandsc.gov</a></p>

## **6.0 Availability for Interview Between February 3-7, 2020**

Future iQ Team members will make themselves available for an interview during the week of February 3-7, 2020.

## 7.0 Appendix A: About Jon Stover & Associates

### JON STOVER & ASSOCIATES

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



#### ECONOMIC DEVELOPMENT CONSULTING

We help make neighborhoods great.

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

#### OUR HISTORY

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

#### OUR SERVICES

Analysis	Strategy	Implementation
Fiscal & Economic Impact	Revitalization Strategy	Nonprofit Formation & Restructuring
Economic & Demographic Analysis	Retail Support Strategy	Marketing, Branding, & TA
Real Estate Market Analysis	Public Planning Initiatives	Stakeholder Engagement
Development Feasibility, Positioning	Strategic Planning	Project Coordination & Support

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

## 8.0 Appendix B: Phase Two Additional Proposed Team Members

### 8.1 Johanna Hoffman, Sr. Foresight and Planning Specialist, Future iQ

#### RÉSUMÉ



#### EDUCATION

MLA Landscape Architecture & Environmental Planning, University of California, Berkeley, CA

BA Creative Writing and Environmental Studies, Oberlin, Oberlin, OH

#### EMPLOYMENT

Senior Project Manager and Design Specialist, MKThink, San Francisco, CA, 2018 - Present

Founder & Lead Designer, Shiftworks, Berkeley, CA, 2016 - 2019

Resilient Design Associate, Urban Fabrick, San Francisco, CA, 2016 - 2017

Coastal Sustainability Studio Fellow, Louisiana State University, Baton Rouge, LA, 2016

Designer & Researcher, The Open Workshop, San Francisco, CA, 2015

Landscape Designer, Terrain Studio, San Francisco, CA, 2014

Co-Editor and Director, GroundUp Journal, UC Berkeley, 2012 - 2013

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#### JOHANNA HOFFMAN, M.L.A., B.A

##### SENIOR FORESIGHT AND PLANNING SPECIALIST

Johanna Hoffman is an award-winning urban designer, foresight practitioner and strategic planner focused on helping cities, communities and organisations create more adaptive futures. She holds a Masters degree in Landscape Architecture and Environmental Planning and a Bachelor's degree in Environmental Science and Creative Writing. She uses her 10+ years of experience to help clients navigate dynamic change through comprehensive plans and interactive engagement strategies. Data visualisation, strategy, qualitative and quantitative research all form important aspects of her work. She has lectured and presented at institutions from University California Berkeley and the Yerba Buena Center for the Arts to the Rhode Island School of Design and the Massachusetts Institute of Technology. Recent clients include the University of Hawaii, the Oakland Unified Planning District and the San Francisco International Airport.

#### RECENT PROJECT EXPERIENCE

- Senior Project Manager and Design Specialist, MKThink, San Francisco, CA, 2018 - Present
- Founder & Lead Designer, Shiftworks, Berkeley, CA, 2016 - 2019
- Resilient Design Associate, Urban Fabrick, San Francisco, CA, 2016 - 2017
- Coastal Sustainability Studio Fellow, Louisiana State University, Baton Rouge, LA, 2016
- Designer & Researcher, The Open Workshop, San Francisco, CA, 2015
- Landscape Designer, Terrain Studio, San Francisco, CA, 2014
- Co-Editor and Director, GroundUp Journal, UC Berkeley, 2012 - 2013
- Designer & Researcher, Hood Studio, Oakland CA, 2011 - 2013
- Research Associate, Arava Institute, Israel, 2010
- Research Associate, Oberlin College, Oberlin, OH., 2009
- Research Coordinator, Perry Institute of Marine Science, Exumas, Bahamas, 2008
- Researcher, RV Heraclitus, Polynesia, 2004

#### RELEVANT PUBLICATIONS

- "Overlooking Risk Until It's Too Late is No Longer An Option." Smart Cities Dive, 2017
- "Incremental Development." World Landscape Architecture, 2015
- "5 Cities That Will Benefit from Climate Change." Next City, 2014
- "In Iceland's resilience, a lesson for us as our world shifts." The Daily Climate, 2014
- "Better Red Than Dead." Earth Island Journal, 2011
- "Grow Wetlands Fight Global Warming?" The Ecology Center., 2010

#### PROFESSIONAL AFFILIATIONS

American Society of Landscape Architects  
Yerba Buena Center for the Arts  
San Francisco Urban Planning Research  
The European Futures Observatory

#### JOHANNA HOFFMAN

johanna@future-iq.com

## 8.2 Jon Stover, Managing Partner, JS&A

### Jon Stover, Managing Partner

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

#### Education

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

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

#### Speaking Engagements

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

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

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

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

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

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

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

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

#### Relevant Project Experience

**Smithville Comprehensive Plan** | *Smithville, Missouri  
City of Smithville*

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

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

**Middlebury Downtown Master Plan** | *Middlebury, Vermont  
Town of Middlebury*

**Western Avenue Corridor Study and Rezoning Real Estate and Development Analysis** | *Boston, Massachusetts, Boston Planning & Development Agency*

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

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

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

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

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

**Nightlife Economic Impact Study** | *Washington, DC  
Washington DC Economic Partnership and the Mayor's Office of Nightlife and Culture*

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

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

**Southwest Neighborhood Plan** | *Washington, DC  
DC Office of Planning*

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

## 8.3 Leslie Deacon, AICP, Senior Consultant / Project Manager, JS&A

### Leslie Deacon, AICP, Senior Consultant | Project Manager

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

#### Education

Columbia University  
Masters of Science  
in Urban Planning

University of Cincinnati  
Bachelor of Science  
in Architecture

#### Affiliations

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

#### Speaking Engagements

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

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

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

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

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

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

#### Experience

Land Use Planner  
Bayer Becker  
Cincinnati, Ohio

#### Relevant Project Experience

**Smithville Comprehensive Plan** | Smithville, Missouri  
City of Smithville

**Western Avenue Corridor Study and Rezoning Real Estate and Development Analysis** |  
Boston, Massachusetts, Boston Planning and Development Agency

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

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

**Middlebury Downtown Master Plan** | Middlebury, Vermont  
Town of Middlebury

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

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

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

**Cleveland Park Market Analysis, Capacity Building, and Strategic Plan** | Washington,  
DC  
DC Deputy Mayor's Office of Economic Development and Planning

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

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

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

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

\*Projects conducted while at Bayer Becker.

## 8.4 Aaron King, Analyst, JS&A

### Aaron King, Analyst

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

#### Education

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

#### Speaking Engagements

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

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

#### Experience

*Co-Founder & Director  
Better Block Wilmington  
Wilmington, DE*

#### Relevant Project Experience

**Middlebury Downtown Master Plan** | Middlebury, Vermont  
*Town of Middlebury*

**Smithville Comprehensive Plan** | Smithville, Missouri  
*City of Smithville*

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

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

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

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

**Middlebury Downtown Master Plan** | Middlebury, Vermont  
*Town of Middlebury*

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

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

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

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

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

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

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