



CITY OF APPLETON

MEMORANDUM

Date: December 4, 2024

To: Chairperson Jones, Members of the Human Resources/Information Technology Committee, and Appleton Common Council Members

From: Jay Ratchman, Human Resources Director

Subject: City of Appleton Strategic Guide Facilitation Services

Following the completion of the Request for Proposal (RFP) process, we have carefully evaluated the submissions from several qualified firms to lead the strategic planning process for City of Appleton. Based on a thorough review, we are recommending CP2 Consulting to facilitate this critical initiative.

The RFP process was conducted in accordance with established guidelines, ensuring transparency and fairness. Proposals were assessed against the following criteria:

1. **Experience and Qualifications:** Demonstrated success in strategic planning for organizations similar to ours.
2. **Proposed Approach:** A clear, customized methodology that aligned with our goals and challenges.
3. **Cost and Value:** Alignment with budgetary constraints while offering maximum value.
4. **References:** Strong endorsements from previous clients.

The selection committee reviewed proposals and interviews were held with finalist.

The cost bid from CP2 is \$44,200, with a travel allowance of up to \$5,000 (the average cost for bids received were \$63,300, with an average travel allowance up to \$6,250). Funding of \$45,000 from existing ARPA funds were designated and approved for this project by the Common Council on August 21, 2024. We believe the total costs, with travel, for this project can be managed within the total funded amount approved by the Common Council. If not, we will use existing funds from the organizational development budget.

If approved, we look to engage CP2 right away. The timeline and additional details can be found in the enclosed proposal.

Thank you for your consideration for this request.