



Agenda Item

City Council

Item #: 7.2.

11/28/2023

File #: 23-0781

TO: Honorable Mayor and Members of the City Council

THRU: Tom Kisela, City Manager

1. SUBJECT

Agreement with Kelly Associates Management Group LLC to facilitate and update the City's Strategic Plan.

2. SUMMARY

The proposed agreement with Kelly Associates Management Group LLC will help the City evaluate its organizational goals and identify means to achieve these goals through an updated Strategic Plan.

3. RECOMMENDED ACTION

Approve the agreement with Kelly Associates Management Group LLC in the amount of \$20,000 to update the City's Strategic Plan; and authorize the Mayor and City Clerk to execute on behalf of the City.

4. FISCAL IMPACT

The total expenditure for this agreement is \$20,000 and will be funded through General Fund (100) account number 100.0201.51670.00000.

5. STRATEGIC PLAN GOALS

The proposed recommendation will support each goal identified in the current Strategic Plan by making comprehensive changes/updates to better align with the Orange Community's service priorities and needs.

6. DISCUSSION AND BACKGROUND

The City of Orange's Strategic Plan was adopted in January 2008 and updated in 2018. Currently, the Strategic Plan offers a high-level overview of the City's organizational purpose, mission, vision, and values. To ensure the Strategic Plan is a "living document" reflecting the community's preeminent needs, the City Council expressed interest in making comprehensive changes to the existing Strategic Plan.

Pursuant to Orange Municipal Code Section 3.02.420 (pertaining to informal written proposal solicitations), staff contacted and met with three firms that have led citywide strategic planning processes and workplans with other local governments in Southern California. After detailing the City's needs, expectations, and anticipated Strategic Plan adoption date, the City received three proposals from Baker Tilly (formerly Management Partners), Jacob Green & Associates, and Kelly Associates Management Group.

Although each firm has been successful in working with local agencies, staff ultimately determined

that Kelly Associates Management Group (“KAMG”) meets the City’s needs while providing strategic planning services at the greatest value to the City. KAMG was formed in 2011 and has provided organizational management, strategic planning, team building, economic development, and city planning services to public agencies and non-profits across California. In Southern California, KAMG has facilitated and developed Strategic Plans for public agencies that include Placentia, Buena Park, Lake Forest, Alhambra, Hawaiian Gardens, and the Orange County Local Agency Formation Commission (“OCLAFCO”).

KAMG’s approach to develop a new Strategic Plan includes an organizational strengths, weaknesses, opportunities, and threats exercise (commonly referred to as a SWOT analysis) with the City Council as well as individual meetings with the City Council. These meetings will help provide perspective/expectations and lay the groundwork for two public study sessions with staff and the City Council (facilitated by KAMG). At these study sessions, overarching community goals will be established as well as the specific tasks/projects to achieve these goals.

At the conclusion of the two study sessions, KAMG will work with staff to develop the Strategic Plan document which will be brought to the City Council for final adoption. City staff contacted previous clients to better discern KAMG’s approach and deliverables. Those contacted spoke positively of KAMG and the services provided to their respective agencies. Additionally, for reference, attached to this staff report are Strategic Plans KAMG helped facilitate with OCLAFCO and the City of Lake Forest.

7. ATTACHMENTS

- Professional Services Agreement with Kelly Associates Management Group
- OCLAFCO Strategic Plan
- City of Lake Forest Example Strategic Plan
- Summary of Services