



November 27, 2024
Town of Yorktown
Attn: Chase Bruton, Town Manger
9312 W Smith St
Yorktown, IN 47396

Delivered via email to cbruton@yorktownindiana.org

Re: Strategic Prioritization Planning

Mr. Bruton,

Thank you for the opportunity to support your efforts in creating a comprehensive Strategic Prioritization Plan for the Town of Yorktown. The Veridus Group is excited to assist the council and staff in identifying and focusing on key municipal priorities to ensure efficient allocation of budget and time, while maintaining the essential services that contribute to the town's overall functionality and quality of life.

Our approach will facilitate thoughtful discussions with the council and staff, as well as the community to identify which key segments—such as infrastructure (roads, sanitary sewer, water, and storm sewer systems), parks and recreation (including park spaces, trails, and programming), housing expansion or maintenance, economic development, relationships with other public services, and public safety (fire and police)—should be prioritized and resourced most heavily. Recognizing that not all areas can be supported at the same level, our process will focus on guiding stakeholders through deliberate, informed conversations about each segment to determine its relative importance within the town's overarching goals. Rather than focusing solely on the segments themselves, we will concentrate on their strategic significance and how prioritizing one area may influence or support others, ensuring a balanced and impactful allocation of time and resources.

Drawing on our extensive expertise in municipal operations, strategic planning, and community development, Veridus will utilize data-driven insights, stakeholder input, and proven methodologies to guide this effort. Our goal is to provide the Town of Yorktown with a clear and actionable plan that prioritizes key investments, aligns with the town's vision, and supports long-term success across all aspects of municipal services. This process will enable the council and staff to focus on high-impact areas while ensuring that other services continue to meet community needs.

PROJECT SCOPE

In crafting the Strategic Prioritization Plan, Veridus agrees to perform the following services:

1. Project Launch

- **Action Step:** Facilitate a collaborative project launch meeting with key stakeholders, including the Yorktown Town Council, staff, and representatives from other critical groups such as the redevelopment commission, school system, and county officials. This meeting will establish guiding principles and align project goals.

- **Document Review:** Conduct a comprehensive review of existing planning documents, land-use policies, infrastructure plans, and other relevant materials to ensure alignment with Yorktown's current frameworks and objectives.
- **Vision Development:** Organize a facilitated discussion to collaboratively establish guiding principles for the strategic prioritization plan, aligning with the council's and staff's desired outcomes.
- **Outcome:** A documented set of guiding vision principles and project goals will be developed and shared with the project team. These principles will provide a strategic foundation for the prioritization plan, ensuring alignment with Yorktown's long-term objectives.

2. Public Input

- **Action Step:** Conduct a structured public input process to gather insights and feedback from the Yorktown community, including stakeholder groups and residents, to identify priorities and understand the town's current strengths and challenges.
 - **Stakeholder Meetings:** Engage stakeholder groups such as the Chamber of Commerce, local leaders, town staff, and redevelopment commission representatives in focused discussions to capture their perspectives on municipal priorities.
 - **One-on-One Discussions:** Offer opportunities for individual meetings with council members, the town manager, or other key individuals to address specific concerns or ideas.
 - **Town-Wide Public Meeting:** Host a community-wide meeting at the end of the day to ensure broad participation and input, fostering a sense of inclusion and transparency.
 - **Synthesis of Input:** Analyze feedback from all sessions to identify common themes, areas of consensus, and any conflicting priorities.
- **Outcome:** A comprehensive summary of public input will be developed, providing actionable insights into community needs, opportunities, and challenges. This information will guide the council and staff in making informed decisions throughout the planning process.

3. SWOT Analysis

- **Action Step:** Facilitate a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis with the council, key staff, and relevant stakeholders to evaluate Yorktown's current position and future potential in critical areas of municipal service.
 - **Facilitated Discussion:** Guide participants through a structured process to identify the town's strengths, weaknesses, opportunities, and threats.
 - **Focused Analysis:** Ensure the analysis specifically covers critical areas such as infrastructure, parks and recreation, housing, economic development, intergovernmental relationships, and public safety.
 - **Prioritization:** Work with the group to prioritize the findings, identifying which areas require immediate attention and which can be addressed in the longer term.
- **Outcome:** A detailed SWOT analysis report will be provided, outlining areas where Yorktown is excelling, where improvements are needed, and where strategic opportunities or risks lie. This will serve as a critical input for the next steps in the planning process.

4. Key Project Identification

- **Action Step:** Facilitate prioritization to identify key projects to establish a clear, shared understanding of Yorktown's strategic direction and most impactful initiatives. These sessions may take place as part of a planning retreat.
 - **Vision Workshops:** Host interactive workshops with the council, staff, and stakeholders to define the long-term vision and action items for Yorktown. Discussions will focus on projects the town wants to achieve over the next five years across critical areas such as infrastructure, housing, parks, economic development, and public safety.
 - **Project Brainstorming:** Encourage participants to identify potential projects and initiatives aligned with the defined vision, emphasizing both large-scale transformative projects and smaller, impactful actions.
 - **Project Prioritization:** Use a structured decision-making framework to evaluate and prioritize proposed projects based on criteria such as feasibility, community impact, cost, and alignment with Yorktown's goals.
- **Outcome:** A clearly defined vision statement and a prioritized list of key projects will be developed. This will serve as a roadmap for Yorktown's strategic focus over the next five years, ensuring alignment and actionable direction.

5. Action Matrix Development

- **Action Step:** Develop a detailed strategic action matrix that assigns responsibilities, timelines, and resources for implementing Yorktown's key projects and initiatives.
 - **Responsibility Assignment:** Work with the council and staff to assign clear accountability for each prioritized project, ensuring clarity on who is responsible for implementation and monitoring progress.
 - **Timeline Development:** Establish realistic timelines for each project, including milestones and key deliverables, to facilitate effective planning and execution.
 - **Resource Allocation:** Identify the resources—financial, human, and technological—required for each project and discuss how these will be sourced or reallocated.
- **Outcome:** A comprehensive strategic action matrix will be delivered, outlining each project's purpose, assigned responsibilities, timelines, and resource needs. This tool will provide the council and staff with a clear implementation framework to guide their work.

6. Draft Review and Public Meeting Presentation

- **Action Step:** Present the draft strategic prioritization plan to the council and key staff for review and feedback; final presentation facilitated at Town Council Meeting.
 - **Internal Review:** Share the draft plan with council members and key staff for initial feedback, focusing on refining content and ensuring accuracy and alignment with Yorktown's objectives.
 - **Incorporate Feedback:** Revise the plan based on feedback from the internal review to ensure it reflects the town's needs and aspirations accurately.
 - **Public Presentation:** Present final document at a council meeting to share the plan.



- **Outcome:** A finalized strategic prioritization plan will be completed, incorporating input from key stakeholders and the public. This ensures the plan is both actionable and reflective of Yorktown’s collective vision and priorities.

PROJECT SCHEDULE

The schedule for services performed under this work agreement is as follows:

The anticipated timeline for this project is six (6) months with an estimated start date in January 2025.

Given this timeline, the project would be completed in June 2025.

VERIDUS COMPENSATION

We are excited to help the Town of Yorktown in identifying and achieving their goals. The total fee for this effort is:

Strategic Prioritization Plan.....\$47,500

Compensation for services rendered will be billed on a percent-complete basis.

Estimates are for budgeting purposes only and are based on our hourly rates (\$245/hour for Principal time, \$215/hour for Directors, and \$180/hour for Project Managers). Veridus’ representatives for this project will be:

- Tim Jensen, PE, LEED AP.....Principal, Veridus Group, Inc.
- Jack Woods.....Director, Community and Economic Development
- Kody Leach.....Project Manager, Community and Economic Development

We will track our hours and tasks, and they will be included on the monthly invoice as appropriate. Full payment of invoices is due within 30 days from the invoice date.

If payment is not made within 30 days of the date when the payment is due, we may, at our option, and effective upon the delivery of written notice of our intention to do so, terminate the contract or suspend further performance of our services under the contract, and we shall have no liability for delay or damage that results from the termination of the contract or suspension of services.

REIMBURSABLE EXPENSES

The following expenses will be considered reimbursable and will be invoiced at their direct costs on monthly invoices:

- A. Any studies or plans paid for by Veridus;
- B. Reproduction services for plans and specifications other than for normal in-house coordination;
- C. Overnight postage, certified mail, and delivery services; and,
- D. Mileage at the current federal rate.

Thank you for your time and consideration. The fees outlined in this proposal are valid for one year from the date of this letter. We will look forward to the opportunity to schedule a meeting to review the proposal in detail, confirm that it fully addresses your needs, and outline the appropriate next steps. Additionally, we believe



a partnering agreement would be advantageous for pursuing these projects collaboratively. Once the scope of work is finalized, we will prepare a formal contract and begin the project promptly.

Should you have any questions or require further information, please feel free to contact me directly at 317-441-2100.

Sincerely,

A handwritten signature in black ink that reads "Jack Woods".

Jack Woods
Director, Community and Economic Development
Veridus Group, Inc.