

**INDIAN RIVER COUNTY, FLORIDA
OFFICE OF THE COUNTY ADMINISTRATOR**

TO: Board of County Commissioners

FROM: John A. Titkanich, Jr., ICMA-CM, AICP

DATE: September 27, 2023

SUBJECT: Sole Source Designation for Saviak Consulting, LLC (Strategic Plan)

BACKGROUND AND DISCUSSION:

The need to develop an Indian River County Strategic Plan to formulate our organization's mission, vision, values, goals, and priorities is critical to the future of the County, both organizationally and communitywide. I am proposing this strategic planning endeavor be completed in a multi-phased process.

Initially, through a facilitated workshop the Board and senior leadership team will develop the County's mission, vision, values, goals, and priorities. These will serve to inform and guide our FY2024/2025 budget process in addition to directing administrative and operational affairs. The second phase will engage an internal strategic planning team and involve stakeholders to operationalize the adopted goals; formulate strategies and actionable items/plans; develop and implementation plan; and identify key performance metrics/measures.

To facilitate a timely strategic planning initiative (first phase) that will culminate in a goals and priorities report/document completed by December 2023/January 2024, I am recommending and requesting the Board of County Commissioners waive the requirement for the RFP process for professional consulting services.

Attached, the Board will find a proposal/memo from Saviak Consulting, LLC detailing the process and deliverables. The cost, excluding reasonable work-related expenses, is \$30,000.

While the initial strategic planning phase cost is within my spending authority and below the bid threshold, staff believes it is appropriate and judicious to recognize and consider there may be additional costs for future strategic planning phases. The County may want to utilize the same firm, and that may result in exceeding the bid threshold of \$75,000.

Attached are the bios for the project principals, Dr. Joseph Saviak and Dr. Richard Levey, which details their significant public sector management and leadership experience; as well as, professional services provided to local governments. I have previously worked with and or retained the professional services of both Dr. Saviak and Dr. Levey.

FUNDING

The County budgeted \$100,000 in the General Fund/County Administrator/Other Professional Services account (00120112-033190); thus, there is sufficient funds to cover this initial phase of strategic planning. Should additional professional services be required for future phases of strategic planning, it would be presented to the Board for consideration.

Title	Account	Amount
General Fund/County Administrator/Other Professional Services	0012012-033190	\$30,000

RECOMMENDATION

Staff recommends the Board waive the requirement for bids and authorize the County Attorney to prepare a formal agreement to memorialize the expectations, deliverables, costs, and terms. The total amount for this phase of strategic planning shall not exceed \$30,000, excluding work-related expenses.

ATTACHMENTS:

Project Overview Memo
Bios – Dr. Saviak and Dr. Levey