



Strategic Planning Proposal

Prepared for:
Peter Lee
01 / 16 / 2026



Velocity Ref# COO011626

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About Velocity

Why Velocity?

At Velocity, we help organizations cut through the noise to align and transform their organizations. Our clients consistently see improved productivity, talent retention, and organizational efficiency.

Velocity brings extensive experience in strategy and the people side of business. We know how to intentionalize culture and strengthen a sense of belonging through employee engagement. Velocity is considered a trusted partner and often seen as a direct extension of our clients. Leveraging various frameworks, tools, and platforms to support the organization's requirements, Velocity brings new and innovative solutions to your engagement.

Velocity Services Overview

The state of the modern workforce is changing faster than ever. Velocity offers a wide range of solutions, all with a single objective in mind: to actively involve your employees and foster the growth of your business.



Strategic Planning Overview

Annual Strategic Planning Sessions are a critical business tool to help you prepare for the next 12 to 36 months. By being proactive, you can analyze your current systems, provide an avenue to implement innovation, and ensure that everyone on the team understands the goals and is accountable for them. Whether you are currently undergoing organizational changes, or are planning to do so, our experienced advisors will help you set the direction for your company.

Professionally facilitated sessions allow for full team participation while ensuring objectivity. Your Strategic Planning package will be fully customized based on the desired outcomes that your organization's leadership deem most important. Following the off-site event, we will work with you and your team to deliver a comprehensive roadmap and support you to ensure sustainability and implementation. The planning session will provide the leadership team three primary benefits which are:

- Unified vision and direction among all leadership
- A clear, attainable action plan through priorities and milestones
- Complete support through the execution of the plan to achieve desired objectives

Phase 1: Pre-Session Planning

- Meeting to establish timeline and additional objectives
- Survey and/or interviews of critical stakeholders
- Creating a customized agenda

Phase 2: Professionally Facilitated Session

- Senior-level facilitator
- Fast paced, engaging event with tangible outcomes
- Identified priorities and framework of the strategy

Phase 3: Post-Event Support (Execution Phase)

A one-page game plan capturing the critical components of your strategy

- A comprehensive document capturing the information shared from the day
- Debrief session (face to face when possible)
- One year of support through calls, emails, etc.
- Three coaching calls to support execution
- One year of hosting the plan on a cloud-based project management system

Investment Review

Name	Price
Strategic Planning Session April 30th, 2026 in Ocala, FL	\$9,500.00

Total USD \$9,500.00

Munis Set up for
NTE \$11,000

Terms & Conditions

Travel Expenses

Client is responsible for covering all travel-related expenses incurred by Velocity Advisory Group team members delivering in-person programs at the client's location. This includes, but is not limited to, airfare, ground transportation, parking, tolls, mileage to and from work sites, lodging for overnight stays, and meals. All travel costs will be invoiced within 10 business days following the event.

Printing and Shipping of Materials

Client is responsible for the cost of printing and shipping all participant workbooks and program materials required for the session(s). This includes any additional materials the client requests to accompany the program. All printing and shipping costs will be invoiced as applicable.

Securing Training Dates

Signature and written verification that the first payment has been issued is required to lock in training dates.

Failure to Perform

While Velocity Advisory Group intends to fulfill its full obligation under this agreement, the Client will be entitled to exercise the right to cancel the remainder of the agreement should Velocity fail to perform. No refunds will be given for any prior work delivered before a cancellation due to a Failure to Perform. Failure to Perform is defined as a "no show" to a mutually-agreed upon session, or poor performance during a session as evidenced by 60% or more of participants providing documented feedback indicating unsatisfactory performance. Velocity Advisory Group cannot be responsible for acts of God or travel delays outside of its control. A notice of cancellation on grounds of Failure to Perform must be delivered in writing with any appropriate supporting documentation.

Payment Terms

½ of the total contract will be invoiced within 2 weeks of acceptance of the proposal. The final payment of ½ of the total contract will be invoiced within 10 business days after the scheduled appearance date.

Proprietary Information

This document contains proprietary information and is strictly confidential. It may not be copied, distributed or reproduced in whole or in part, nor passed to any third party.

AI Policy

Velocity Advisory Group may utilize AI-supported tools to enhance the delivery of this engagement. All use of AI will comply with Velocity's internal AI guidelines. Should your organization have additional AI-related policies or requirements, please share them upon contract execution.

Signature

Proposal Accepted By:

Peter Lee

Dave Fechtman

Peter Lee
City of Ocala

Dave Fechtman
Velocity Advisory Group, LLC

01 / 28 / 2026

01 / 16 / 2026

Please enter the name and email address for the Billing POC: Lori Boley lboley@ocalafl.gov

If a PO is required, please check this box:

n/a

APPROVED AS TO FORM AND LEGALITY:



WILLIAM E. SEXTON, CITY ATTORNEY
CITY OF OCALA, FLORIDA

CERTIFICATE *of* SIGNATURE

REF. NUMBER
70WED-IBYWU-QQXB7-C7YGT

DOCUMENT COMPLETED BY ALL PARTIES ON
28 JAN 2026 20:05:05
UTC

SIGNER

TIMESTAMP

SIGNATURE

DAVE FECHTMAN

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SHARED VIA
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16 JAN 2026 15:23:15

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Dave Fechtman

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