

Town of Erie, Colorado

Consultant for Facilitation of Agency Vision, Mission, and Values

June 5, 2019





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Amy Teetzel
Administrative Operations Manager
Town of Erie
645 Holbrook Street
Erie, CO 80516

Dear Ms. Teetzel:

The mission of The Novak Consulting Group is to strengthen organizations, for those they serve and those who work in them. We are dedicated to providing management consulting services to local governments and nonprofit organizations across the country. The firm was originally established as Public Management Partners in 2001, a firm specializing in local government consulting in the Midwest. Since then, we have been providing our clients with the best thinking and execution in organizational design, development, and improvement.

We are pleased to submit this proposal to the Town of Erie for Facilitation of Agency Vision, Mission, and Values Services. This proposal is based on our understanding of the needs for this engagement as outlined in the Town's Request for Proposals, as well as our experience facilitating strategic planning processes for local governments across the country.

We have had significant success working with community members, elected officials, department leadership teams, and staff to identify priorities for an organization or a community and achieve consensus. We are also skilled in developing effective implementation models that ensure the goals developed for the strategic plan are measurable and actually achieved. We are confident our approach will provide the Town with the direction it seeks for the future.

Our team is available to dedicate the time, personnel, and resources needed to meet the schedule outlined in this proposal. We look forward to the opportunity to serve Erie. Please contact me at (513) 309-0444 or jnovak@thenovakconsultinggroup.com should you have any questions. As President, I am authorized to bind the firm. We are in receipt of Addendum #1 dated May 24, 2019.

Sincerely,

Julia D. Novak
President

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Qualifications

For nearly a decade, a highly respected management consulting firm named Public Management Partners helped a variety of organizations function more effectively. Through the years, the firm's founding partners built a sizeable client base of predominantly local governments and nonprofit organizations in the Midwest. Projects ranged from those as small as conducting community workshops to those as sweeping as analyzing the operational efficiency of entire departments within a municipality.

In 2009, Julia D. Novak acquired Public Management Partners and founded The Novak Consulting Group, staffed by consultants with decades of collective experience. With The Novak Consulting Group, Julia built upon Public Management Partners' reputation for innovation and results while expanding the company's services nationwide. Her company meets a wider range of needs, consulting with governments in the areas of public works, public safety, human resources, finance, planning, IT, and more. We provide our clients with the best thinking and execution in organizational design, development, and improvement. Our services include:

- Strategic Planning
- Organizational Assessment and Optimization
- Executive Search

The Novak Consulting Group provides unparalleled service to our clients. Leaders in local governments and nonprofit communities have come to rely on The Novak Consulting Group for high caliber advice with the personal attention you expect.

- **Niche expertise.** Our expertise lies in strengthening two kinds of organizations: local governments and nonprofits. We're consulting specialists rather than generalists, focusing our strengths to do a highly effective job for a specific group of clients.
- **Flexibility to serve you better.** We employ a small core staff of senior-level consultants, and draw from our pool of subject matter experts when their expertise can help us serve you better. The result? A highly nimble, more efficient approach to giving you the services you need, when you need them.
- **Decades of collective experience.** Our associates and subject matter experts have decades of experience in strengthening local municipalities and nonprofit organizations. They've served in a wide range of positions, from city manager to public works director to director of management information systems.
- **Personal service from senior-level consultants.** You appreciate it when deadlines are met, phone calls are returned, and your challenges are given in-depth, out-of-the-box thinking. While a large firm may assign your business to junior-level people, we offer exceptional service from senior-level consultants.

The Novak Consulting Group is a women-owned firm led by President Julia Novak, headquartered in Cincinnati, Ohio. The firm is staffed with local government professionals. The firm has a history of consistently meeting client deadlines and project budgets. We encourage the Town to contact any of the references listed in this proposal, or any of our past clients, to hear directly about our commitment to quality and timely work in every engagement. Over 30% of our clients have hired us more than once, which we believe is a testament to our dedication and client satisfaction.

*The Novak Consulting Group
Strengthening organizations from the inside out.*

Our project team is made up of senior level consultants with direct local government experience. What sets our project team apart is our ability to explore and relate to local community values while at the same time investigating realistic approaches for long-term strategic solutions.

President Julia Novak will serve as the project manager and primary facilitator for this process. Julia has completed hundreds of facilitations/strategic planning exercises with more than 75 governing bodies in 24 states across the United States. She has worked in and around local governments for more than 30 years, both as a practitioner in direct service to local governments and as a full-time consultant who has worked with hundreds of organizations. She founded The Novak Consulting Group in 2009. As a professional consultant, she has led engagements in communities of all sizes covering the full spectrum of local government services. She has worked with governing bodies across the country to establish goals and set priorities and is an established thought leader in the areas of governance and management. During her local government career, she worked in Fort Collins, Colorado; Lexington, Massachusetts; Rockville, Maryland; and was city manager of Rye, New York. Julia earned a bachelor's degree in government and politics from George Mason University and a master's degree in public administration from the University of Kansas. Julia was in the first class of individuals certified by ICMA as Credentialed Local Government Managers and maintains that designation.

Visual Facilitator Julie Gieseke – Julie collaborates on projects utilizing the tools of group process and design such as Visual Facilitation, Creative Engagement, and storytelling to bring strategy and tactics into clear focus. She uses the skills of facilitation, active listening, and graphic recording to bring energy and vibrancy to each engagement. Julie has been associated with The Novak Consulting Group since 2011 and has worked on a variety of strategic planning and facilitation projects. She has a master's degree in Organizational Development and Management from Fielding Graduate University, is certified as a professional coach through The Coaches Training Institute, and is a certified Master Practitioner of Neurolinguistics. Julie also received professional training through The Grove Consultants International and has been mentored by leaders in the fields of visual facilitation, facilitation, organizational development, coaching, storytelling, and performance.

Analyst Christiana Cabrera - Christiana joins The Novak Consulting Group after serving as the ICMA Local Government Management Fellow for the Town of Munster, Indiana. During her time in Munster, Christiana specialized in budget preparation, financial analysis, and project management. Prior to being a fellow, she served as the Planning Intern and Administrative Intern for the Village of Glen Ellyn, Illinois, while obtaining her Master of Public Administration degree from Northern Illinois University.

Complete bios of our key staff are included.

Julia D. Novak, President

Julia established The Novak Consulting Group in September 2009. Her reputation and experience as a consultant who offers practical and implementable recommendations are grounded in more than 15 years of active service to local governments where she worked in Fort Collins, Colorado; Lexington, Massachusetts; Rockville, Maryland; and was city manager of Rye, New York. She is a practitioner first, who has expanded her knowledge and expertise as a consultant for hundreds of organizations across the United States.

Julia has extensive experience as a facilitator and trainer. She has worked with both elected and appointed officials from jurisdictions throughout the United States to conduct goal setting, develop strategic plans, and prioritize service delivery. She has conducted training for elected officials as an individual trainer and through the National League of Cities and a consortium of cities in California. Topics included leadership style and evaluating appointed officials. Her list of governing body clients includes more than 70 jurisdictions in 23 states.

Julia is an established thought leader in the areas of governance and administration. In April 2002, Julia was one of 20 practitioners who participated in the ICMA-sponsored symposium on the future of local government administration. Her response to Dr. James Svara's paper, "City Council, Roles, Performance, and the Form of Government," is included in the ICMA-published book, "The Future of Local Government Administration." Public Management Magazine has published multiple articles that she authored and co-authored, including "Preparing Councils for Their Work," co-authored with Dr. John Nalbandian; "Permission to Manage" which discusses the importance of using data to manage local governments; "Dreams That Make a Difference" on the value of community based strategic planning; "Civility," and most recently, "Using Data in Police Management." In 2010, Julia served as a trainer for a USAID Initiative in Baghdad, Iraq to develop the capacity of local advisors and councils in Iraq to engage in strategic planning, project management, policy analysis, and policy advocacy.

Julia has been a speaker at national conferences for the ICMA, National League of Cities, and American Society of Public Administrators. She has been a featured speaker/trainer for many state associations, including Ohio, Vermont, Connecticut, New Hampshire, Pennsylvania, North Carolina, the Metropolitan (D.C.) Association of Local Government Administrators, and the Illinois Assistant Municipal Managers Association.

Julia earned a bachelor's degree in government and politics from George Mason University and a master's degree in public administration from the University of Kansas. Julia was in the first class of individuals certified by ICMA as Credentialed Local Government Managers and maintains that designation. Julia is a Master Facilitator of the popular Myers-Briggs Personality Type Indicator and is certified to administer several other Level B psychological assessments, Apter Motivational Styles Profile, and the Strength Deployment Inventory. She also is trained in popular level-A assessments, including the Thomas-Killman Conflict Modes Inventory and the Human Element-B.

EDUCATION

- Master of Public Administration, University of Kansas
- Bachelor of Arts, George Mason University

PROFESSIONAL CERTIFICATIONS

- Certified Professional Manager, International City/County Management Association
- Master Facilitator, The Myers-Briggs Personality Type Indicator

INDUSTRY TENURE

- 30+ years
- Consulting, 15+ years
- Local Government, 15+ years

Julie Gieseke, Visual Facilitator

Julie collaborates on projects utilizing the tools of group process and design such as visual facilitation, creative engagement, and storytelling to bring strategy and tactics into clear focus. In addition, she incorporates change methodologies such as Appreciative Inquiry, Positive Psychology, Strengths Finder, and Neurolinguistics. Julie's unique skillset combines facilitation, active listening, and graphic recording to bring energy and vibrancy to each engagement. Julie has been associated with The Novak Consulting Group since 2011 and has worked on a variety of strategic planning and facilitation projects.

Julie developed her group process design through a broad range of experience. She received her master's degree in Organizational Development and Management from Fielding Graduate University, is certified as a professional coach through The Coaches Training Institute, and is a certified Master Practitioner of Neurolinguistics. Julie also received professional training through The Grove Consultants International and has been mentored by leaders in the fields of visual facilitation, facilitation, organizational development, coaching, storytelling, and performance. The result is a wide range of exposure to various approaches that culminates in a unique style that is customizable for each engagement.

EDUCATION

- Master of Arts in Organizational Development and Management, Fielding Graduate University
- Bachelor of Arts in Film and Video Production/Theater Arts, UC Santa Cruz

CERTIFICATIONS

- Master Practitioner of Neurolinguistics
- Certified Professional Coach

Christiana Cabrera, Analyst

Christiana joined The Novak Consulting Group in 2019 after serving as the ICMA Local Government Management Fellow for the Town of Munster, Indiana. In this role, she specialized in budget preparation, financial analysis, and project management.

Prior to her position with the Town, Christiana served the Village of Glen Ellyn, Illinois as the Planning Intern and Administrative Intern. She was the staff liaison for the Village Environmental Commission, conducted surveys of surrounding communities, and processed various permit applications.

Before moving into the public sector, Christiana spent four years as a director for a nonprofit organization geared toward the empowerment of all women. She coordinated national, regional, and local retreats and created national programs for academic and emotional intelligence development.

Christiana earned a bachelor's degree in theater from Millikin University and a master's degree in public administration from Northern Illinois University. She is a member of the International City/County Management Association and a former recipient of the NIU Rhoten A. Smith Assistantship and David and Catherine Arnold Conference Fellowship.

EDUCATION

- Master of Public Administration, Northern Illinois University
- Bachelor of Art, Theater, Millikin University

INDUSTRY TENURE

- 3 years
- Local Government, 3 years

Experience/Deliverables

At its best, visioning engages individuals and strengthens a sense of community that undergirds strong civic engagement. Tapping individuals who are content, and even perhaps apathetic, creates new leaders for the future and energizes people in a positive way toward their local government. At The Novak Consulting Group, we believe that communities and organizations function best when there is engagement during *good* times, not just when people oppose something. By creating constructive dialogue, the community is much more likely to react productively and civilly when something occurs that might otherwise bring out nonproductive forms of engagement.

The Novak Consulting Group understands the unique roles of each stakeholder. Each participant in this process comes to this engagement with a different perspective and, perhaps, conflicting priorities. Each of these viewpoints is important and valuable. It is our responsibility to work in partnership with the Town to synthesize this information and facilitate a process that:

- Honors and respects the diversity of opinions of participants;
- Promotes group communication and collaboration through inclusivity and community building; and
- Provides useful information and direction for decision making and priority setting.

Effective and efficient project management will be critical for ensuring successful completion of this engagement. Therefore, our approach is to work collaboratively with the Town to ensure all expectations are articulated from the start. We remain in close contact with our clients throughout all phases of each engagement to ensure these expectations are met. This also allows us to quickly address any contingencies that may arise. Our experience with similar work enables The Novak Consulting Group to hit the ground running.

We have provided a scope of work that will result in a valuable tool that will serve as a guide for the future and assist in the realization of a shared vision. The process explores three specific questions:

- What do we know to be true? – *Who are we?*
- What do we hope will be true in the future? – *Where are we going?*
- What must go well in order to make it so? – *How are we going to achieve it?*

In this way, a vision is a roadmap to move a community toward its intended vision.

The following outlines our scope of services based on the information detailed in the Town's RFP.

Activity 1: Begin Engagement

A successful strategic planning process will benefit from a collaborative relationship between the consulting team and the Town from the very beginning of the process. This task is intended to begin building that relationship.

At the start of this engagement, we will request and review all background information, including results of other planning processes and other relevant data. Next, The Novak Consulting Group

will meet with the Town leadership staff to gain a clear picture of what the Town hopes to accomplish from this process. We want to ensure that we have a shared understanding for how to develop the vision, as well as a solid understanding of the Town's current operating environment. We will review the project plan and finalize the schedule.

Activity 2: Assess Organizational Context

The Novak Consulting Group will work collaboratively with the Town to understand the current state of the Town and potential future impacts. As part of this process, we will conduct individual meetings with each Department Director team to hear their perspective about the organization. We will also discuss any existing departmental strategic or visioning plans.

Activity 3: Engage Town Employees

To engage other staff in the process, we will develop and administer an online survey available to all Town staff. The survey will seek to gather input from employees regarding elements of a vision, mission, and values, as well as identify other organizational issues that may be relevant to this work. Additionally, we will facilitate a series of focus groups with employees to further refine the organizational values and explore issues that surface from the survey.

Activity 4: Facilitate Development of Strategic Planning Framework

Following the input process, The Novak Consulting Group will facilitate a strategic planning workshop with the Town's leadership team. The results of the input process will be reviewed and discussed as a basis for finalizing the vision, mission, and values for the organization.

During the session, the primary role of the facilitator is to ensure that the environment is respectful and conducive to open and constructive dialogue so that the established objectives are ultimately met. While the agenda provides the structure to accomplish the tasks, we also know how important it is to pay attention to the group and make sure that conversations that need to happen actually happen, so we are flexible and in tune with the group during the process.

Additionally, we incorporate visual facilitation into the workshop, which engages participants in multiple ways. It also creates maps that allow connections to be made between the content of the conversation and the ultimate priorities contained in the strategic plan framework.

Activity 5: Prepare Project Deliverables

At the conclusion of the above activities, The Novak Consulting Group will prepare a comprehensive deliverable that includes the results of the process. We will review the draft deliverables with the Town and make any necessary changes or modifications prior to finalization. The final deliverables will include a graphic summary of the elements.

The Novak Consulting Group has extensive experience with visioning and strategic planning throughout the country. A complete listing of all clients is included with this proposal, along a listing of all of Julia's facilitation and strategic planning engagements. Several samples have also been included.

Louisville, Colorado contracted with The Novak Consulting Group to prepare the City's first Strategic Plan. The purpose of the project was to develop an organizational culture that supported the governing body's vision. The project included interviews with staff and elected officials, an employee survey, and workshops that lead to the plan's adoption in December 2018.

Megan Davis, Deputy City Manager
(303) 335-4539 mdavis@louisvilleco.gov

Centennial, Colorado engaged The Novak Consulting Group in 2018 to develop their first Strategic Planning Framework. During 2019, that work was expanded to include a clear Vision, Organizational Mission and Values Statements, and Key Performance Areas that will drive success for the City.

Eric Eddy, Director of Strategic Initiatives
(303) 325-8000 eeddy@centennialco.gov

League City, Texas retained the services of The Novak Consulting Group to help them develop their first ever strategic plan for the City. The project included an employee survey and several workshops with the City's Management Team as well as the Mayor and City Council to develop their final strategic plan.

Ogden "Bo" Bass, Assistant City Manager
(281) 554-1007 Bo.Bass@leaguecitytx.gov

Yountville, California engaged The Novak Consulting Group to facilitate a strategic planning process that involved the Town Council, staff, and the community. The Council established the vision, key focus areas, and strategic initiatives for the community with direct input from residents, businesses, and other Town stakeholders. Town staff developed a corresponding mission and organizational values to guide the organization as it supports implementation of the new strategic plan. The plan was updated this past year to reflect new Council priorities.

Steve Rogers, Town Manager
(707) 944-8851 SRogers@yville.com

Westborough, Massachusetts contracted with The Novak Consulting Group in 2018 to facilitate a comprehensive strategic planning process for the Town. The process included extensive public outreach, focus groups, and online resident engagement which resulted in a comprehensive Vision for the Westborough community and an articulation of the Town's role in achieving that vision.

Kristi Williams, Interim Town Manager
(508) 366-3032 kwilliams@town.westborough.ma.us

Fee

The total fixed fee to complete the scope of work outlined in this proposal is \$34,800. Of this amount \$27,680 is for professional services and \$7,120 is for expenses.

Below is a break down of the fee and hours by activity.

Activity	Hours	Fee
1 - Begin Engagement	6	\$3,103
2 - Assess Organizational Context	34	\$8,674
3 - Engage Town Employees	48	\$11,196
4 - Facilitate Development of Strategic Planning Framework	20	\$8,756
5 - Prepare Project Deliverables	16	\$3,071
Total	64	\$34,800

Hourly rates are as follows:

- Julia Novak, President = \$350
- Julie Gieseke, Visual Facilitator = \$250
- Christiana Cabrera, Analyst = \$95

It is our practice to invoice monthly based on work completed.