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City of McCleary – Facilitation Proposal

August 7, 2024

Dear Jenna -

Thank you for reaching out to The Athena Group to facilitate the City's leadership retreat on September 14, 2024. Outlined on the following pages is our understanding of the work, information on our facilitator, Karen Meyer, and the estimated cost. We look forward to speaking to you further to see how we might be of service.

Sincerely,

Faith Trimble, Founder and Partner
The Athena Group

The Athena Group, LLC	
Headquarters	101 Capitol Way N., Ste. 301, Olympia, WA 98501
Phone/Fax	(360) 754-1954, (360) 252-6555
Website	www.athenaplace.com
State of Incorporation	Washington
WA UBI Number	603 303 751
Tax ID Number	46-3407964
WBE/DBE Number	W2F0017471/D2F0017471
DUNS Number	08-003-1319
UEI Number	LUMHLE4BSZA1
Project Contact	Karen Meyer, 360-808-8875, karenm@athenaplace.com
Contracting Contact	Kate King, Contract Coordination, (360) 754-1954 x112, katek@athenaplace.com

Project Understanding

We understand that the City of McCleary would like to contract with The Athena Group to facilitate a retreat with about 9 participants on Saturday, Sept. 14, 2024, from 9 – 2:30 pm.

About The Athena Group

The Athena Group, LLC is a women and minority-owned consulting business headquartered on the traditional territories of the Coast Salish, specifically the Nisqually and Squaxin Island people – otherwise known as Olympia, WA.

We are an anti-racist, self-organizing, for-purpose enterprise that cultivates the capacity for transformational change in individuals, systems, and society. As our clients move towards their vision of a better world, we support them through our leadership development, organizational health, and community engagement services and products. We intentionally work with a mindset of shifting away from “power over” to “power with” internally and with our clients—helping to engender a world where economic prosperity for all is inevitable, and social equity and environmental responsibility are local and global priorities.

The Athena Group has served over 250 clients through the successful completion of 600+ contracts in state, regional, and local governments and business and community-based organizations since 1999. We are licensed to do business in Washington, Oregon, California, Colorado, and Hawaii.

Project Team

Karen Meyer (she/her) is the proposed facilitator for the event. Karen brings over 25 years' experience in helping communities understand and advocate for important issues through assessment, facilitation, strategic planning, engagement, project management and facilitation. Most recently, Karen led the community health assessment (CHA) and community health improvement plan (CHIP) for the Tacoma Pierce County Health Department, using a variety of qualitative and quantitative data collection and analysis methods. Several innovative qualitative methods were used, including training community members to conduct focus groups and community driven practices to share findings and solicit feedback. This work involved numerous partners interested in reducing health inequities through policy and system change.

Scope of Work

Task 1: Pre-planning

Task	Description	Lead	Deliverables
1.1	Kick-Off and Meeting Design	Karen	Agenda and design notes

The Athena facilitator will meet with the client and review relevant materials, discuss the retreat objectives and client expectations, identify populations that need to be centered, and agree upon the format of the final summary report. If there is a draft agenda, the facilitator will recommend changes to the draft agenda based on the retreat objectives. If there is not an agenda, the facilitator will draft an agenda along with design notes on how the meetings will be facilitated. The facilitator will send draft agenda and design notes to the client for review and approval. If meeting supplies are needed, the facilitator will pick-up the supplies and bring them to the retreat.

Task 2: Facilitate Retreat

Task	Description	Lead	Deliverables
2.1	Retreat Facilitation	Karen	Retreat materials, if any

The facilitator will arrive at the retreat 1 hour before the event begins to set up the space, discuss last-minute details with the client, and welcome participants as they arrive. The facilitator will lead the participants through the agenda, utilizing the approved design. The agenda or design may need to shift based on the participant needs; if necessary, the facilitator has the authority to change the agenda or design to accomplish the retreat objectives.

The retreat will be in-person for 5.5 hours with about 9 participants. If possible, the client will provide a staff person who will write notes of the key activities and decisions. The facilitator will stay after the retreat for 1 hour to speak with participants, debrief with the client, and pack up materials.

Task 3: Post-Retreat De-brief

Task	Description	Lead	Deliverables
3.1	Hold brief meetings in the 1 – 2 weeks following retreat to de-brief	Karen	Summary report

The facilitator will draft a short summary of what went well, what could occur differently next time and any loose ends to tie up.

Cost Estimate

Tasks		Hours	Total Cost	Assumptions
Task 1	Preplanning	2	\$550	Client meeting to discuss agenda and goals for the retreat at kick-off meeting. Final agenda will be sent after kick off meeting.
Task 2	Facilitate Meeting	7.5	\$2062.50	Travel time is paid at half rate. The facilitator will be at retreat ~1 hour before and ~1 hour after.
Task 3	Summary results	2	\$550	Most useful format can be done within the time allocated.
	Hard Costs		\$75	Mileage @.67/mile and carbon offset, and facilitation materials if needed.
		11.5	\$3237.50	

