

SBRAND SOLUTIONS

PROPOSAL FOR CITY OF NOVI, MICHIGAN

STRATEGIC PLANNING SERVICES



Strategic. Sustainable. Success.

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{SBrand}
HELPING YOU FILL IN THE BLANKS



January 20, 2025

Victor Cardenas, City Manager
Finance Counter, 2nd Floor
City of Novi
45175 Ten Mile Road
Novi, Michigan 48375

Request for Proposal: Facilitation of Community Strategic Planning Process

Dear Mr. Cardenas;

I am excited about the opportunity to collaborate with the team at the City of Novi in facilitating a process to create a community driven strategic plan (Novi 2050). Our experienced team, with over 55 years of combined expertise in strategic planning and organizational assessments, has a strong history of working with and for local government organizations, and we've collaborated on communities who have never done strategic planning to agencies who have a long and successful history of implementing strategic plans. We've worked with several cities across the country and are well aware of the applicable statutes, regulations and other relevant issues governing public agencies in Michigan.

With my background in key local government roles such as Assistant County Administrator, Economic Development Director, and Community Development Director, I possess a nuanced understanding of the challenges faced by cities and public organizations nationwide. The resulting document will be a guide or roadmap for community priorities and goals and will include timeframes, realistic measurements, and measurable results.

I'm excited by the opportunity to work with the City of Novi, in large part because your stated outcomes and values for this project directly align with our values and methodology:

- Broaden the conversation to incorporate a wide range of perspectives
- Be inclusive in our efforts, reaching out to hear from voices that may not have participated in the past
- Involve the community in a meaningful way, building consensus so that they understand and support the final results (that feeling of ownership)
- Create a shared vision and innovative, adaptable goals that are a roadmap to the future



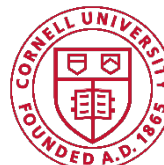
- Develop actionable results that can be measured
- Be completely transparent throughout the project
- Adopting a living strategic plan, one that is applied in both practical and visionary ways that will continue the discussion about the future of Novi

As a Certified Master Facilitator™, I lead a hand-picked team dedicated to delivering tangible results **based on engagement, collaboration, and consensus building**. Our process emphasizes engagement involving your community members, staff, stakeholders, partners in the community and even regional and state organizations. An [article published in ICMA Magazine](#) highlights our approach to inclusive engagement.

We appreciate the longer time frame for this work – the depth and breadth of community engagement often takes months (especially over the summer). We do believe we could deliver this work by January of 2026, but our timeframe does follow the request in the RFP for May 2026 adoption. This proposal is our offer which is good for a one hundred eighty (180) calendar day period from the date of opening. We submitted this proposal without any collusion with any other person or entity submitting a proposal pursuant to this RFP. I would be the person responsible and authorized to make representations for the firm.

Thank you for considering us as a partner. I am eager to further discuss our proposal and explore the potential collaboration that lies ahead and look forward to the opportunity to contribute to your strategic planning efforts.

Respectfully,



Sheryl Trent
Owner, SBrand Solutions
2850 SW 50th Terrace
Cape Coral, Florida 33914

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sheryl@sbrandsolutions.com



Statement of Addendum

We are in receipt of Addendum 1 and Addendum 2 for this RFP.

Qualifications and Experience: Firm Overview

Established in January of 2011, SBrand Solutions is a woman owned LLC firm with unique expertise in working with local government clients to solve problems and “fill in the blanks.” As a professional strategic planning and facilitation firm, we partner with your team through solutions *and* implementation. SBrand Solutions has successfully facilitated and implemented numerous Strategic Plans for cities and government organizations similar to your organization. You can view several examples of the Strategic Plans and Implementation Plans that we create with our clients at our [Google Drive project example archive](#).

We have five areas of core expertise:

- ✓ **Consensus Focused Facilitation**
- ✓ **Results Based Strategic Planning**
- ✓ **Systematic Organizational Assessments**
- ✓ **Collaborative Team Development**
- ✓ **Inclusive Community Engagement**

This is what makes us different: What sets us apart is our genuine understanding of city operations, thanks to our real-life experience working as employees in this sector. Additionally, our team consists of certified facilitators who are trained in the specialized tools and methods necessary to deliver the results you require. Over the years, we've collaboratively crafted more than 100 strategic plans for local government clients. Our approach combines this unique perspective on strategic planning with innovative methods to gather information and feedback, making us the ideal choice as your partner.

We always employ a strategic framework and a proven methodology that not only encourages but necessitates diversity, equity, and inclusivity to achieve the best results. With our deep-rooted experience in local government, professional facilitation certifications and strategic planning expertise, we know how to pose the right questions to the right people, in the most effective manner (the R3 principle).



The SBrand team is a diverse group of professionals with expertise spanning various areas, including government finance, economic development, community development, parks and recreation, public works, community safety, civic engagement, team assessments, communications, board, and team development and much more. We deliberately limit our client base to ensure that we provide the exceptional service that is our hallmark, and we tailor our results and interaction to meet your specific needs. Our approach is based on a proven methodology that is tailored to your unique requirements. As your strategic partner, we work collaboratively to develop a strategic framework and implementation plan, complete with measurements, progress tracking methods, and clearly designated roles and responsibilities for your staff.

As a boutique firm, we offer our clients the following which is one of our many distinguishing characteristics: **You will ALWAYS collaborate with the people in this proposal.** We will NEVER assign you to a less qualified staff. "Who you see here is who you will be working with on the project." That allows us to build a true relationship with you (over 60% of our work is with a prior client, and an additional 15% of our work is from a referral) over the course of the project and better understand all the complexities of your situation.

Profiles of Key Team Members



Sheryl Trent

Sheryl will serve as primary business contact, project manager and lead facilitator. Sheryl served as a city manager, assistant city manager and department director in cities and counties for over 28 years. Additionally, she is one of fewer than 50 Certified Master Facilitators® in the world and is a Certified Virtual Facilitator™. She also holds a certification from Cornell University in Diversity, Equity, and Inclusion. Her real-life experience includes managing long range plans, strategic plans, comprehensive plans, multimillion-dollar capital projects, economic development agencies and Urban Renewal Authorities; and, in combination with her nonprofit City Council service, her experience provides a unique understanding of the needs of clients.

She serves on [the Board of the International Institute for Facilitation](#), the world's leading institution for facilitation research and innovative learning. She is a member of the Association for Strategic Planning, the National Center for Deliberative Debate, several local government associations and groups and a regular speaker and contributor to various platforms on facilitation and inclusion. She has an MPA from the University of Washington and holds a CPM from ICMA.



Zach Ratkai

Zach Ratkai is a government collaborator and champion of the public sector with over 21 years of experience working in and with municipalities throughout Colorado and Washington. He is the Local Government Programs Director with the Benton-Franklin Council of Governments and specializes in collaborating with communities and non-profits to create functional and collaborative cultures to serve their missions.

Zach holds a master's degree in public administration and a graduate certificate in public management from the University of Colorado. He also holds a bachelor's degree in Applied Geography from the University of Northern Colorado. Zach's work in government experience includes economic development, city planning, government administration and political advocacy, -- a journey that has taken him to the Colorado and Washington State Capitols, the US Capitol, and the White House to advocate for the interests of local communities.



Mitzi Rapkin

Mitzi will serve as a second lead facilitator and is a Certified Structured Facilitator, Certified Virtual Facilitator™, and is certified in Foundations in Public Participation by the International Association for Public Participation. Her portfolio includes work helping nonprofits, libraries, educational institutions, volunteer boards, and governments articulate and achieve their goals. She has worked in communications and public engagement for more than 15 years and has 30 years of experience as a journalist, interviewer, and writer. She is the producer and host of a literary podcast called *First Draft: A Dialogue on Writing* and has interviewed more than 400 authors in the last decade.

Mitzi's passion is helping individuals and groups reach and achieve their potential and distilling big, complicated, abstract ideas into concise and digestible language. She is a creative thinker and inspires groups to approach themselves and solve problems in new ways.

She holds an MS in Journalism from the Medill School of Journalism at Northwestern University, an MFA in Creative Writing from Warren Wilson College, and a BA in English and Religion from Indiana University. She is also an International Coaching Federation Certified Professional Coach.



Antoine Desabille

Antoine is a professional administrative support executive. He is enthusiastic about helping clients achieve the highest quality solutions, through innovation and amazing customer service. He is a Certified Virtual Facilitator® and provides technical and programming support for our virtual and hybrid meetings. He loves to play the guitar, listen to music, remember useless movie trivia, play basketball with friends, and enjoy the outdoors.

Note that SBrand Solutions has several other professional facilitators available to assist if needed and works with a professional graphic design firm.



References with Example Plans

Please see the following reference projects, along with links to review their completed Strategic Plans.

Abismael Abreu, MPA, *Strategic Initiatives Administrator*

City of St. Cloud

1300 9th Street

St. Cloud, Florida 34769

P: 407-957-8445 | **C:** 407-813-3236

Abismael.abreu@stcloudfl.gov

Project: 2024 Community Strategic Plan (the first one for the community)

Process: The first strategic plan for the City of St. Cloud, a community of over 60,000 near Orlando that has immense growth and a large geographical base. With a community survey, significant public engagement, several Council and staff retreats and meetings as part of the methodology, there were three main deliverables: a new Strategic Plan, an Implementation Plan and a set of City Values.

Outcomes: The Council approved the strategic plan unanimously and the implementation work is underway with regular meetings structured around updates. The budget was aligned with the strategic plan, allowing for new positions to be created, and funded to support the work.

<https://www.stcloudfl.gov/1974/Citys-Strategic-Plan>

Marcus Thorne, Project Manager

ReCAST Lawrenceville/City of Lawrenceville

70 South Clayton Street

Lawrenceville, Georgia 30046

Marcus.thorne@lawrencevillega.org

[\(678\) 407-6653](tel:6784076653)

Project: 2022 - 2023 Community Needs Resource Assessment (CNRA) and Strategic Plan for ReCAST Lawrenceville federal grant.'

Process: Intensive and robust community outreach and engagement focused on at risk youth and families to include personal interviews, community open houses, presentations at partners and nonprofits, surveys including youth surveys, sticky notes, dry erase boards and other inclusive methods culminating in a three-day strategic and implementation planning session.

Outcomes: Federally approved grant for the CNRA and Strategic Plan; focused alignment and direction for the Advisory Group; ongoing implementation direction for staff. Full support from the City Council.

<https://www.lawrencevillega.org/621/About-ReCAST>



Val Covey, County Commissioner

Williamson County Texas Precinct 3

100 Wilco Way, Suite CO 201

Georgetown, TX 78626

Ph: 512-943-3370

Comm3@wilco.org

Project: 2023 (and ongoing) Comprehensive 10-year strategic plan for Williamson County incorporating all 1800 employees, 35 elected officials and 25 department heads. This was the first ever strategic plan for the County.

Process: Utilizing survey of internal and external stakeholders, confidential interviews, multiple focus groups, a Commissioners session, and a leadership strategic planning retreat, we created a strategic plan that supports the Vision and Mission of Williamson County. The Key Goal teams met in a series of implementation meetings to craft the Implementation Plan, and the team agreed to a reporting tool and updating process that is guided by ongoing facilitation work from SBrand Solutions.

Outcomes: Based on the strategic plan, the County hired a new County Administrator, focused their budget conversations around the Plan goals, and created an inter departmental (elected and appointed) team to manage the implementation plan.

<https://www.wilcotx.gov/1146/Strategic-Plan>

Josh Rydell, City Commissioner

City of Coconut Creek

4800 West Copans Road

Coconut Creek, Florida, 33063

jrydell@coconutcreek.net

(954) 973-6770

Project: 2021 Updating Vision 2020 to Vision 2030

Process: Significant and extensive community engagement process utilizing surveys, interviews, social media, website creation, white boards, sticky notes, Advisory Group meetings, community meetings, Department Head meetings, graphic recorder, presentation to community stakeholders, event attendance and public meetings.

Outcomes: Strong community engagement (highest attendance at virtual meetings), education about City responsibilities and accountability, graphic community vision.

<https://www.coconutcreek.net/community-relations/vision-2030>

If you would like to see even more examples of our strategic plans for libraries and other agencies, as well as examples of our community engagement work, please click [this link to the full Google Drive of relevant projects.](#)



City Staff Assistance

SBrand Solutions provides a full level of personal and administrative support to complete the project. The anticipated time and resource commitment from your team would include attendance at a weekly meeting (to give guidance), creating contact information, support selecting and/or reserving meeting space, sharing important documents and information, reviews of draft and final documents and participation in facilitated meetings.

Description of the Approach

The timeline presented in the RFP allowed a full fifteen (15 months) for the strategic plan process, so our proposal aligns with that timeframe, but we do feel it would be possible to complete earlier, even with a very robust and widespread community engagement process. We have a unique perspective on creating the assessment and strategic plan, a deep understanding of the issues facing communities across America, and a proven ability to design facilitated meetings that drive outcomes. Coupled with our expertise in facilitation, we bring an expert level of skill to our work.





Our work is not created in a vacuum by us, rather we will work in a collaborative partnership with the City, staff, and stakeholders to collaborate on an actionable strategic plan to help guide policy priorities and budget allocations into the future. For example, while we will recommend a framework for a community plan, we would want to get input and feedback from staff, stakeholders and most importantly, representatives from the segments of the community that may not have participated or been heard from at the same levels as other segments. It's important to reach out to people in ways that make them feel included, that feel comfortable to them, and that they can easily access and engage with to get the best feedback.

The foundation of SBrand's proven approaches to strategic plan development rests on the following guiding principles:

- ✓ **Customized**
- ✓ **Participatory**
- ✓ **Aligned and Integrated**
- ✓ **Flexible and Adaptable**
- ✓ **Owners and Champions**
- ✓ **Proven Impact**
- ✓ **Accountability for Implementation**
- ✓ **Measurements of Success**
- ✓ **Reviewed and Updated**
- ✓ **Easy to Communicate**

Fees and Expenses: Tasks, Timelines, Phases and Costs

Below please find our proposal, in a "menu" format. We find that the best results happen when we collaborate with you to design a final approach – so some of these options may be great ideas from our perspective but may not work as well based on your real-life experiences and knowledge, as well as the community needs and expectations.

City of Novi

Facilitation of Community Strategic Planning Process

Phases, Tasks, and Timing



Includes all supplies needed for meetings, creation of any/all materials, graphic design and other elements
SBrand invoices for these services monthly for tasks completed during the month.

Phases and Tasks		Deliverables	Proposed Dates	Proposed Cost
Phase 1 - Logistics, Project Management and Foundation			March and ongoing	
Task 1 1	Kickoff and Logistics Meeting (virtual) - 2 hour meeting	Logistics meeting to review framework, process, milestones and deliverables (with the Long Range Strategic Planning Committee)	Week of March 3, 2025	\$ 750.00
Task 1 2	Weekly planning meetings (virtual) with Working Group	Weekly for six months, for updates, feedback, course correction (with the Long Range Strategic Planning Committee)	Ongoing	\$ 3,600.00
Task 1 3	Monthly update meetings	With the Steering Committee (virtual and in person)	Ongoing	\$ 1,500.00
Task 1 4	Creation of Project Management Plan	Timeline, dates, specific projects and details	By March 17, 2024	Included
Task 1 5	Develop a Communication Plan	To include recommendations for tasks, dates, and ownership of social media, graphics, handouts, documents, engagement techniques, events, postcards, school surveys and more	By March 24	Included
Task 1 6	Ongoing calls and emails for life of the project		Ongoing	Included
Phase 1 Investment: Approved project management plan and ongoing communication				\$ 5,850.00
Phase 2 - Research and Review			March 2025 - March 2026	
Task 2 1	Review all related documents	Land Use Master Plan, Parks Master Plan, Fire Master Plan, past plans, etc.	Ongoing	Included
Task 2 2	Review all local, regional and state documents		Ongoing	Included
Task 2 3	Research and compile demographic and other statistical data and information	Demographic, environmental, trends, economic data	Ongoing	Included
Phase 2 Investment: Full review of all documentation and research of materials				\$ -
Phase 3 - Outreach and Engagement			May 2025- Early November 2025	
Task 3 1	Recommend best practices and set up recruitment for Steering Committee	Includes creation of a Steering Committee handout, document and other materials to assist Examples: Leaders in the community in specific areas, chairs of volunteer commissions/boards, agencies that serve underrepresented voices in the community, youth organizations, educational institutions	By March 24, 2025	Included
Task 3 2	Recommended partners for engagement	Examples: Elected officials, department heads, key employees, community stakeholders, and partners		Included
Task 3 3	Recommended list of individual interviewees	Example: Business owners, other governmental agencies, service groups, nonprofit agencies, economic development partners, Chambers of Commerce, school district, youth groups, senior groups, non English speaking, faith based		Included
Task 3 4	Recommended list of groups for outreach	Generate ideas, conduct a "contest", recommend tag lines for adoption		Included
Option 3	Create a tag line for Novi 2050	Based on the tag line and the vision, create 3 logos for consideration for Novi 2050		\$ 500.00
Option 3	Design a logo for Novi 2050	Four separate surveys: internal for staff, external for general community, external for youth (or other specific outreach needs) and external for stakeholders		\$ 1,500.00
Task 3 5	Create draft and final survey questions for approval	Curating and designing questions specific to the interviewees		\$ 2,000.00
Task 3 6	Create draft and final interview questions for approval	For each focus group, designing questions to engage and receive the best feedback		\$ 500.00
Task 3 7	Create draft and final focus group questions for approval	Estimated based on proposal, can be customized to your needs. Includes website, social media design, handouts, attendance at events, presentations to community groups, formal articles or press releases		\$ 12,000.00
Task 3 8	Implementation of the engagement and communication plan	Five specific focus group meetings, 2 hours each, in person		\$ 7,500.00
Task 3 9	Community focus group meetings	Specific Focus Group for previous elected officials, 2 hours in person		\$ 1,500.00
Task 3 10	Previous Elected Officials Workshop	Workshop for the current Board, 2 hours in person		\$ 1,500.00
Task 3 11	Current Board Workshop	Three focus group meetings for employees, 2 hours each in person		\$ 4,500.00
Task 3 12	Employee Focus Groups	Surveys monitored with customized questions		\$ 500.00
Task 3 13	Online surveys released and monitored	30 personal interviews, 1 hour+ each		\$ 6,000.00
Task 3 14	Confidential personal interviews	Anticipate 10 presentations, one hour each, will include feedback and engagement options (Rotary, School Board, volunteer Boards or Commissions, etc)		Included
Task 3 15	Presentations to Boards, Commissions, Community Groups and others as needed	Engagement Report with themes, priorities, and areas of concern		Included
Task 3 16	Full report of engagement data: interviews, surveys, community meetings, and focus groups			\$ 36,500.00
Phase 3 Investment: Engagement, Facilitated Meetings, Survey, Interviews, Feedback Report				
Phase 4 - Facilitate the strategic planning process			January - March 2026	
Task 4 1	Community Visioning Session	In person, with a graphic facilitator to create a vision	Mid January, 2026	\$ 10,000.00
Task 4 2	Community Values Listening Session	In person session, 4 hours	Mid January, 2026	\$ 3,500.00

Trip 1

Trip 2

Trip 2

Task	4	3	Two day retreat to complete all the details of the Strategic Plan	Two full day meetings (6-8 hours) with the Council, Steering Committee, key staff and others as desired	Early February, 2026	\$	18,000.00	Trip 3
Task	4	4	Leadership meetings (based on Priorities or Goals) to complete the Implementation Matrix	Half Day Meeting (4 hours) to created the Implementation Plan with internal leadership team	Early March, 2026	\$	3,500.00	Trip 4
Phase 4 Investment: Facilitated Strategic Plan and Implementation Plan meetings and staff feedback meeting							\$ 35,000.00	
Phase 5 - Create and Review Documents					April - May 2026			
Task	5	1	Strategic Plan Framework Draft	Draft document	By March 31, 2026	\$	2,500.00	
Task	5	2	Community Meeting to Review Draft	1 hour meeting, in person to review draft	Early April, 2026	\$	750.00	Trip 5
Task	5	3	Council Work Session to Review Draft	2 hour meeting to review the draft and gather improvements, in person	April, 2026	\$	750.00	Trip 5
Task	5	4	Strategic Plan Revision #1	Up to three revisions based on feedback (typos and minor revisions included at any time, no cost)	Month of April	Included		
Task	5	5	Strategic Plan Final	Final strategic plan for consideration	Late April, 2026	Included		
Task	5	6	Summary Strategic Plan	Strategic Plan handout with high level summary	May, 2026	\$	500.00	
Task	5	7	Recommended Measurements	Additional measurements to consider implementing over time	May, 2026	Included		
Task	5	8	Recommended Dashboard	Recommendations for dashboard content and creation	May, 2026	Included*		
Task	5	9	Implementation Matrix and Plan	Final matrix with roles, responsibilities, milestones and metrics	May, 2026	\$	1,250.00	
Task	5	10	Executive Summary with Recommendations	Executive Summary of Process and Recommendations	May, 2026	Included		
Task	5	11	Create templates for ongoing evaluation and updates	Create templates and ensure process is in place for review, update and communication about the plan moving forward	May, 2026			
Task	5	12	Present Plan for Adoption	In Person Presentation	May, 2026	\$	500.00	Trip 6
Phase 5 Investment: Strategic Plan, Implementation Plan, Measurement Documents, and Report/Update Documents							\$ 6,250.00	
Total Project Cost						\$	83,600.00	
Travel to be billed at cost						\$	7,500.00	
Total Not to Exceed Cost						\$	91,100.00	

*a dashboard can take many forms (Power BI, purchased software) and we would want to recommend the best approach after we have more information)

Recommended Ongoing Support for Implementation and Integration

Includes Templates, Training and Integration	Does not include travel, does include supplies	Pricing
Monthly conference calls, customized templates	Monthly video conference, written templates, all emails and phone calls. individual and team support	Included
Quarterly Review and Update Meeting	Meetings to update the Implementation Plan	\$3,500.00
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Quarterly Review and Update Meeting	Meetings to update the Implementation Plan	\$3,500.00
Updates to Strategic Plan and Implementation	Updates and presentation of the plan	\$500.00
Deliverable: Full Year of Ongoing Support and Implementation Meetings		\$14,500.00

Scope of Work: Services and Methodology

The attached spreadsheet lists key project milestones, broken into five (5) phases of work. An easy way to think about milestones within the project is to think about the four key questions that the process will answer:

Where are we now?
Where are we going?
How will we get there?
How will we know if we are successful?



Our methodology: Through a customized facilitation process, we engage with stakeholders that have diverse backgrounds, unique perspectives, cultural differences, and divergent views of the future to create alignment using shared values and consensus on the vision for the future. Such input drives the development of an actionable, realistic strategic plan with measurable outcomes.

The **five main phases to our methodology:**

- **Phase 1:** Design and launch the project plan based on a customized process.
- **Phase 2:** Research, review and analyze documents including budget, master plans, current strategic plans, regional plans, documents, and other policies.
- **Phase 3:** Outreach to and engage with the community, the County, stakeholders, and staff.
- **Phase 4:** Facilitate listening and planning sessions and implementation meetings.
- **Phase 5:** Based on the assessment, create the Strategic Plan and Implementation Plan documents. This vital phase will make certain that your strategic planning and implementation documents are actionable, realistic and have measurable short and long-term objectives. Additionally, we will create templates for ongoing updates and a reporting structure to keep the plan a living document.



We adapt our approach to each client: We believe in meeting our clients where they are, offering advice and ideas, giving guidance and strong recommendations when needed, and ensuring ongoing sustainability through templates and actionable support.

About Virtual Meetings

We do prefer to meet with you in person but absolutely understand health and budgetary concerns may require virtual facilitation. As professional facilitators, we know how to create a great and seamless facilitated meeting, whether in-person or virtual. Over the years, we have found that virtual meetings are as complex and complicated and take even more planning than in-person meetings.

We staff ALL our virtual meetings with a minimum of two certified facilitators as standard practice, ensuring a fluid and supported environment. We offer the latest in collaborative online tools, with engaging content that is active and participatory and not only substitutes for in person collaboration but matches it. We also mail a packet to all participants for a virtual meeting that is designed to be engaging, practical and fun.

Phase One: Project Kickoff, Research and Review

The kickoff meeting will cover overall logistics and our weekly updates, phone calls and emails will continuously guide the overall project. This interface is the key to building our relationship and charting the course of the project. We will review and determine all the details about the schedule, process and deliverables and discuss the specifics of interviews, workshops/focus groups, document review, dates, and other logistics.

We recommend a weekly check-in video conference throughout the process and all phone calls and emails throughout the life of the project are included at no charge in our proposal. This allows us to update your team regularly, get feedback, address any questions, and make any changes or course corrections immediately during the process. These calls serve as a vital part of the communication mechanism we utilize to keep your team informed of progress, updates, and changes.

Phase Two: Research, Document Review

In this phase, we conduct all our document review and research to gain a deeper understanding of the culture and needs of the organization and community. We review all relevant documents, including the current recommendations, budgets, master plans, current and past strategic plans, regional plans, partners/stakeholders plans and more. Our research also includes community and regional demographics that affect strategic planning, best practices deployed by your peer communities in the state and partner plans that can potentially integrate with or leverage results for your current goals.

Phase Three: Engagement and Outreach

We realize that some engagement and outreach has already taken place, and we would also propose to conduct other opportunities including an employee survey, community wide survey, partner survey, personal interviews and focus groups to drive engagement and feedback. We will use the data gathered during our process (research data and meetings with the Steering Committee) as a baseline, which will inform some of the questions and approaches for engagement. Because we craft the questions for engagement very carefully, we can distill the responses into common themes, ideas, and concepts. Those concepts are incorporated into the design of the process in three ways:

- 1) The agenda, techniques, tools, and processes used during the strategic plan retreat meeting
- 2) The content and structure of the strategic planning document, implementation documents and reporting documents, and
- 3) The final report and recommendations created at the end of the process will identify key organizational short and long-term goals and objectives and fiscal constraints and opportunities to achieve those goals and objectives f over the next two years.

Community Engagement and Communication Plan

A great community engagement plan benefits from a thoughtful, thorough design process so it can be as inclusive, broad, and deep as possible. With a March start, we will want to have at least a 7-month engagement process to cover the summer months and school sessions. Being nimble and adaptable is also key – we’ve found that as we reach out, we discover additional community members that should be involved in the feedback process. We start with a basic framework ([here are a few for your review](#) that become the basis for a deeper conversation with you and your community).

A good example of some deep community outreach was our work for [ReCAST Lawrenceville](#) and if you scroll down on that report to page 34, you can see the different types of outreach, especially to undocumented immigrants, youth and families who were non English speaking, and the homeless community. These are traditionally difficult individuals to reach, and building trust in a short period of time can be hard. We relied heavily on community contacts who already had established services and relationships and asked them to help us with the outreach, providing them with questions, supplies and tools. It was amazing!

The below covers the basic framework of our community engagement process, and we design and create the process as well as all of the supporting documents and tools



needed to conduct outreach. **Here are our initial recommendations for your community engagement process:**

Survey Process

The survey process is focused on community, stakeholder, and employee engagement, with specific questions focused on the future and strategic planning. We are recommending four separate surveys for this reason: one for partners/stakeholders, a second one for the wider range of community members, one for youth in the community and one for staff. We suggest a baseline of 3% of your community overall respond, but we also recommend we set some goals for specific representation from segments of your community such as youth, over 65, differently abled, or non-English speaking.

Focus Groups, Listening Sessions, and Workshops

Our focus groups are facilitated meetings where we engage participants in deeper conversations about current status, priorities for the future, trends, best practices, and opportunities. This engagement style allows participants to not only share their ideas but to listen to one another and create a dialogue that is iterative and builds connection and understanding. Based on our current understanding, we would recommend:

Five (5) general community focus groups to allow as many people as possible to attend.
One (1) focus group for former elected officials, after we have some survey data.
One (1) focus group for current elected officials, after we have some community data.
Three (3) staff focus groups.

Confidential Personal Interviews

The personal interviews are intended to provide additional in-depth insight and allow interviewees to feel comfortable sharing information they might not otherwise. We would recommend thirty (30) interviews and will help guide that selection process.

Social Media Engagement

As a part of our work, we will create weekly [social media posts with graphics](#), photos and texts for City approval. Some will include video and will be created for all the platforms that the City might use (Facebook, Next Door, Website). This will include a graphic designer.

Website

We will design and create a web page (which we can host for the life of the project, or the City can host so it can be updated and maintained in perpetuity) for the process and the resulting plan documents. This will include a graphic designer.



Handouts

We will create a handout for the Steering Committee (recruitment if needed and a handout about the strategic planning process), a community facing handout about the strategic planning process and how to participate, postcards with questions (to handwrite) and QR codes (to go to survey on line) and other documents as needed to promote participation and feedback. These documents will be translated into any languages necessary. We've found handouts sent home with school aged community members can be targeted to age groups (one for the school parent, one for the school child). This will include a graphic designer.

Attendance at Community Events

Face to face conversations always work well when gathering data. With the City's help, we will map out a calendar of significant community events and determine what capture methods will work best: a postcard to take home, a QR code to take the survey on the spot, a handout, sticky notes, a dry erase board or other tools needed to gather data. We will make every effort to coordinate our planned trips to coincide with the events so that we can be there in person, up to 5 events over the project.

Presentation to Community Groups

All communities have groups of people who gather on a regular basis, and could include school boards, Rotary or other service organizations, nonprofit boards, volunteer boards and commissions of the City, Chambers of Commerce and others. We will be happy to do short in person (or virtual if the meeting is virtual) presentations to drive understanding and participation in the process.

Formal Press Releases or Newsletter Articles

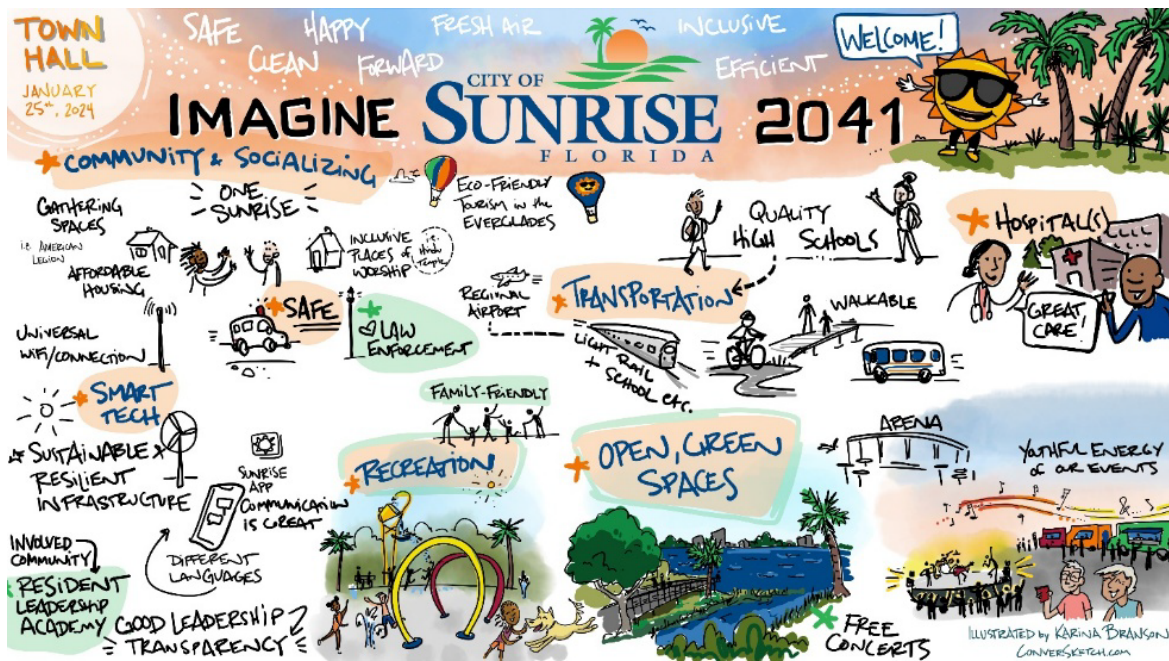
We will draft and finalize up to 10 formal press releases or newsletter articles for the community about the plan. While this often doesn't drive engagement, it will reach a segment of the community that reads online or hard copy materials.

Option: Unique Engagement Tools

With strategic planning outreach, we often use unique engagement tools to reach segments of your community where we need to customize questions or engagement styles. We have implemented **sticky notes** for local nonprofits who work within the community, **brochures** with QR codes for faith-based organizations to hand out, and **dry erase boards** for various organizations such as libraries, the YMCA, or local businesses. You can see some specific examples in [this Google Drive file](#).

Phase Four: Facilitate Strategic Plan and Implementation Roadmap

This is where our background shines! The facilitated meetings are the **heart** of our process and will be the foundation for the components of your strategic plan. Our proposal outlines a series of facilitated meetings over the course of the project. The meetings are designed to build understanding, create support for the goals and priorities, and engage the team in the implementation and final decisions. Our methodology uses consensus and collaboration to guide the strategic plan. As Certified Master Facilitators® and Certified Virtual Facilitators™, we specialize in creating a meeting framework that is engaging, effective and creates the specific desired outcomes.



Community Visioning Session

We are recommending an in-person community session to begin the graphic vision for Novi 2050. Below is a recent example we created for a client over a series of community meetings, with final touches being added by the City Council. This is an amazing way to engage with the community and can be used digitally or the original 4 x 6 version to present to groups to gain more feedback.



Community Values Session

We have found that when values align (and there will be many shared values within the community), conversations about the future can then be guided and driven by the values of the community. We are recommending a community values session.

Note: the vision and values sessions usually happen AFTER the survey so that we have some data to craft the right questions and share information.

Strategic Plan Retreat

We are recommending a two-day retreat with the Council, Steering Committee, and key staff leadership as best practice. The retreat will allow time to have robust and deliberate conversations, fully understand context, discuss unanticipated consequences, and have a better picture of how to achieve the Vision for the future. Not only will teamwork and communication increase but retreat will be fun, engaging, and effective!

We will use all the information from our engagement and outreach phase to inform and guide the conversation around the Strategic Plan components including creating priorities, discussing potential short and long-term goals and objectives, and linking these strategic ideas practically to budget priorities and operational plans. The conversation will include how best to deploy, integrate, and update the plan seamlessly into the operations over the next two years and beyond.

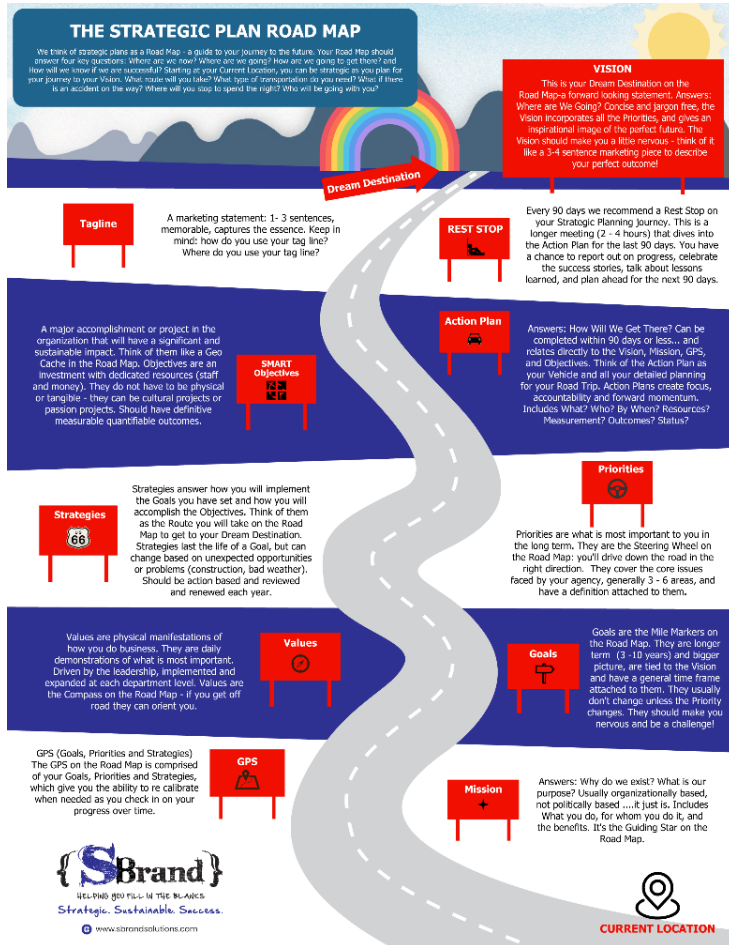
Implementation Roadmap Meeting

In our experience, the group that is often overlooked as a part of the strategic plan process are the employees who implement the plan. We are recommending a series of facilitated meetings to operationalize the policies and strategies from the retreat into an Implementation Plan. The **Implementation Plan** will be the actionable, realistic, “rubber meeting the road” part of the process and will include roles, dates, responsibilities, and resources—all of which will be aligned to the agency’s varied work programs. This detailed, tactical level conversation will take place in a separate meeting once the overarching strategic framework is near completion.

Phase Five: Create Strategic Plan and Implementation Plan Documents

The comprehensive **Strategic Plan** is the guiding document created from all our work. This is your *framework*, your *road map*, your *guide* to the future of the organization, and the *key* to measuring your successes. Our plans are customized to our clients but there are components to any Strategic Plan that are critical to long-term success.

Every great strategic plan will include at least the following components:



- ✓ Vision
- ✓ Mission
- ✓ Core Values and Guiding Principles
- ✓ Priorities/Pillars/Key Areas of Focus
- ✓ Strategic Goals and Outcomes
- ✓ SWOT analysis
- ✓ Initiatives and Projects
- ✓ SMART Objectives
- ✓ Key Performance Indicators or Measurements
- ✓ Critical Success Factors
- ✓ Adaptive Strategies

The **Strategic Plan** and **Implementation Plan** together form the roadmap to guide the team into the future.



The **Implementation Plan** is the tactical and operations side – the “how do we get it done” document. It includes:

- ✓ **Framework for introduction of Performance Measures**
- ✓ **Specific Action Steps**
- ✓ **Owner**
- ✓ **Due Date**
- ✓ **Occurrence**
- ✓ **Resources**
- ✓ **Measurables and Performance Metrics**
- ✓ **Current Status / Evaluation / Updating the Plan**

Summary

Thank you for your consideration of our services! We appreciate and value your time and we are confident that our collaborative and inclusive approach will successfully achieve your outcomes. We look forward to collaborating with you and are happy to provide any additional information or resources that might be helpful to you in your consideration of our proposal.

Appendices

Sheryl Trent Resume
Zach Ratkai Resume
Mitzi Rapkin Resume
Strategic Planning Philosophy
Facilitation Philosophy



Sheryl Trent

(970) 208-6633
sheryl@sbrandsolutions.com
2850 SW 50th Terrace, Cape Coral, Florida 33914
www.sbrandsolutions.com

summary of qualifications

- 28+ years of experience in public and non profit sector leadership and management
- A Certified Master Facilitator®, one of fewer than 40 in the world
- Expert at facilitating complex and confrontational topics in a manner that makes them easy to understand and allows consensus to be built
- Executive team development and team building with both Strengthsfinder and DiSC process.
- Customized methodology and deliverables that build capacity and enhance shared values and vision
- Proven success and long term results across the country
- Unique inclusive community engagement design and tools
- Experienced virtual facilitator for large and small meetings using multiple platforms
- Hundreds of successful, comprehensive strategic plans for cities, counties, state organizations, federal agencies, special districts, non profits and membership organizations
- A Certified Virtual Facilitator
- Certified by Cornell in Diversity and Inclusion
- Created over 100 strategic plans for local governments (city, county, state, and federal agencies)

professional management and leadership experience

since 2011

OWNER, SBrand Solutions, LLC

prior

**COMMUNITY AND ECONOMIC
DEVELOPMENT DIRECTOR**

City of Evans, Colorado

EXECUTIVE DIRECTOR

Evans Redevelopment Agency

TOWN ADMINISTRATOR

Town of Milliken, Colorado

**COMMUNITY DEVELOPMENT DIRECTOR
(ACTING)/ ECONOMIC DEVELOPMENT
MANAGER**

City of Grand Junction, Colorado

INVESTMENT REPRESENTATIVE

Edward Jones Investments, Yreka, California

COUNTY ADMINISTRATOR

(ACTING)/ASSISTANT COUNTY ADMINISTRATOR

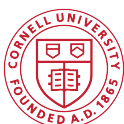
County of Siskiyou, Yreka, California

ASSISTANT TO THE CITY ADMINISTRATOR

City of Santa Paula, Santa Paula, California

ASSISTANT TO THE CITY MANAGER/INTERN

City of Federal Way, Federal Way, Washington



past and present

education

- BA Political Science, University of Washington
- MPA Public Administration, University of Washington
- Certified Master Facilitator®
- Certified Virtual Facilitator™
- Rocky Mountain Leadership Program
- Grand Junction Area Chamber of Commerce Leadership Program
- Credentialed Manager with ICMA
- Certified Life Coach
- Consistent ongoing training and coursework
- Certified in Diversity, Equity and Inclusion, Cornell University

professional affiliations

- ICMA Member
- CCCMA Member
- INIFAC Board Member
- ICSC Member, Government Relations
- IEDCC Member
- Downtown Colorado Member
- Strategic Planning Member Association
- Small Business Development Center Board Member
- Leadership Council, Upstate Colorado
- Adjunct Faculty, Front Range Community College
- Strategic Planning Member Association and
- National Coalition for Dialogue and Deliberation Member
- Chair, International Institute for Facilitation

highlights

- Facilitates the creation of customized strategic plans for public and non profit clients that build capacity, inspire action, ensure accountability, and focus on results.
- Creates fun and engaging team building retreats that increase communication and results in forward momentum and alignment.
- Cultivates curiosity that drives learning and listening through shared values.
- Designs specialized training (in person, manuals and videos) for facilitation skills, strategic planning, Board development and team building.
- Negotiates and administers contracts and agreements with public and private partners that have resulted in multi million dollar capital projects, grants for both capital and planning projects, and agreements for development and sharing of new revenue.
- Leads multi-functional teams to develop new strategies, adopt controversial plans with support and consensus, create new investments and capital projects, and involve a wide range of affected parties.
- Establishes working groups of stakeholders that successfully collaborate to drive implementation, forward momentum and accountability.
- Speaks at keynote engagements on how to effectively facilitate meetings and implement strategic plans.
- Offers sought after on line training for strategic planning and board development at www.sbrandsolutions.com

N. ZACH RATKAI



1876 Nova Lane Richland, WA | 303.594.9569 | Zach@SagelandStrategic.com

Leadership | Innovation | Authenticity | Accountability

CORE COMPETENCIES & AREAS OF EXPERTISE

Economic Development
Land Use Management
Policy Development & Implementation
Budget Management

Strategic Planning
Organizational Assessment
Process Improvement
Community Engagement

Leadership & Team Building
Disaster Response & Recovery
Political Lobbying
Business Development

PROFESSIONAL EXPERIENCE

SAGELAND STRATEGIC LLC

December 2019 to Current | Principal

Consulting firm specializing in strategic planning, organizational assessments, and professional development for local governments, non-profits, and businesses. Services include career coaching for government professionals, meeting facilitation, decision-making support, retreats, and community engagement to enhance organizational effectiveness. Experience working with over 13 public sector agencies across the U.S. to develop strategic plans, conduct organizational assessments, and facilitate productive discussions and workshops, all aimed at helping clients achieve their missions and improve community impact.

BENTON-FRANKLIN COUNCIL OF GOVERNMENTS (Richland, WA)

May 2023 to Current | Local Government Programs Director

Directs local government programs and the Federal Economic Development District for BFCOG. As part of the Leadership Team, managed organizational development, economic and community development programs, and compliance with oversight agency requirements. Oversaw regional economic development, including the Benton-Franklin Economic Development District and collaborated with MPO/RTPO staff on planning functions. Led the creation and revision of the Community Economic Development Strategy (CEDS), aligning regional goals for federal funding. Managed the administration of the EDA Partner Planning Grant (\$450,000) and ARPA funding (\$400,000) for staff and community programs. Provided supervisory support to program staff and advisory committees

CITY OF PASCO, WASHINGTON

September 2018 to May 2023 | Administrative and Community Services Director

Directed the activities of the Administrative and Community Services Department. Responsible for the development, recommendation, and implementation of policies, programs, and procedures that accomplish the goals and objectives of the department which includes the following divisions: Information Technology, Facilities, Recreation, Municipal Court (Indigent defense), and the City Clerk in addition to assigned special projects consisting of real estate asset sales and purchasing, facilitation of future bond initiative election for the development of a regional aquatic center, as well as the re-development of the region-wide animal shelter. Responsible for an \$8.4 million general fund budget, a capital improvement budget totaling \$17.6 million for 2020.

CITY OF RICHLAND, WASHINGTON

February 2016 to September 2018 Economic Development Manager (June 2016 to Present) | Redevelopment Project Manager (February 2016 to June 2016)

Managed economic development projects aligned with City Council's strategic goals, focusing on business outreach and recruitment for over 2,100 acres of industrial/commercial land in Richland, WA. Developed retention and attraction strategies targeting job creation, retail growth, and small business support, overseeing a \$12.9M Industrial Development Fund. Supervised a two-person team, coordinating with public works and administrative staff. Served as media liaison for city initiatives, promoting business growth, and led revitalization projects for Downtown and waterfront areas. Represented the Uptown and Parkway Business Improvement Districts, managing planning, design, and budget for local development efforts.

CITY OF EVANS, COLORADO

January 2012 – February 2016 Flood Recovery Manager – Appointed (March 2015 to February 2016) | Community Development Manager (Jan 2013 to February 2016) | Building and Neighborhood Services Manager (Jan 2012 to Jan 2013)

Managed all aspects of the City's comprehensive planning, zoning, growth management, and code administration, including staff supervision (5 employees), contract and budget management, and consulting oversight. Led updates to building and zoning codes and coordinated with Federal, State, and local agencies. Supervised recovery operations from the 2013 floods, including grant acquisition and overseeing \$20 million in reconstruction projects, such as Riverside Park. Facilitated inter-governmental outreach, worked with the Governor's Disaster Resiliency Panel, and maintained relationships with state and federal delegations for legislative and recovery efforts.

TOWN OF SEVERANCE, COLORADO

January 2008 – December 2011 | Town Planner

Management of town historical development information and GIS data. Initiated state-required comprehensive Plan update including a complete overhaul of town land use codes to a form based development regulation document. Assist Town Manager with parks irrigation, personnel matters and finance. Public Information Officer, in charge of emergency notification and community involvement. Town representative for the North Front Range MPO and Upstate Colorado Economic Development.

CITY OF LOVELAND, COLORADO

May 2004 – December 2007 | City Planner I

Project management for current planning review. Coordination of development review team for subdivision review, residential PUD, special use review, annexation, rezoning, architectural/landscape review and field inspection. Project manager for development review software implementation (2007)

EDUCATION

Master of Arts in Public Administration (2014)
Graduate Certificate in Public Management (2012)
Bachelor of Arts in Applied Geography (2004)

University of Colorado
University of Colorado
University of Northern Colorado



Mitzi-Jill Rapkin

STRATEGIC COMMUNICATIONS & FACILITATION PROFESSIONAL

my philosophy

- Strategic planning aligns with organizational values & mission
- Daily work supports long-term organizational goals
- Employees are stakeholders in organization's success
- Internal & external partnerships strengthen organization & outcomes
- Creative thinking pushes innovation & leads to better solutions
- Visionary leadership inspires stakeholder participation
- Communications is transparent and customer service focused
- Collaboration is the foundation of success

executive profile

- Communications professional with proven track record in developing strategic & tactical plans
- Professionally trained and MG Rush Certified Structured Facilitator
- New Ventures West Certified Integral Coach
- IAP2 Certified in Public Participation and Engagement
- Proactively identifies potential problems & provides solutions
- Consistently provide creative ideas to push the communications agenda toward further success
- Deliver customer service and client focused solutions
- Unflinchingly loyal to mission of serving customers with transparent, effective communications
- Persistently evaluating status quo to develop better solutions & more successful outcomes
- Impeccable follow-through
- Strong collaborator with a knack for building partnerships & alliances
- Proponent of continued growth & self-evaluation in order to access excel
- Rise to challenges & produce under pressure
- Highly adaptive & quickly integrates new knowledge to further personal & organizational goals
- Strong balance of left brain critical thinking, logic, & reasoning paired with right brain creativity & imagination

education

MFA Creative Writing | 2016

Warren Wilson College

MS Journalism | 2001

Northwestern University - Medill School of Journalism

BA English & Religion | 1990

Indiana University

Mitzi-Jill Rapkin

STRATEGIC COMMUNICATIONS & FACILITATION PROFESSIONAL

leadership & communications

communications manager

City of Aspen | 2005-2007 & 2011 - present

strategic thinking

- Design and implement City of Aspen's strategic & tactical communications efforts
- Advise city leadership on alignment between policy & communications
- Develop and write communication plans for regular workplan, special projects, & crisis situations
- Communicate organizational vision & policies to community via multi-media outlets
- Create & execute media strategies
- Design & lead citywide training on writing, storytelling, media relations, & engagement strategies

fostering community

- Partner with leadership team to develop & carry-out vision of organization
- Build & cultivate stakeholder relationships within organization & with external partners & community
- Identify & understand the needs of key stakeholders to achieve shared goals
- Facilitate difficult conversations among groups with competing interests
- Design & implement community engagement strategies

execution

- Execute communications projects with focus on successful outcomes & quality product
- Write & edit external & internal collateral such as press releases, marketing materials, & election information
- Compose talking points for City leadership
- Manage & create organization's social media content
- Led project to rebrand City of Aspen, including overseeing project budget

accountability

- Track analytics across multiple platforms to assist with data-driven decisions
- Initiate adoption of new technologies to provide accountability & better organize communications
- Hire & oversee contract communicators, graphic designers, & photographers
- Track budgetary spending

other professional experience

Host & Producer

First Draft: A Dialogue on Writing | 2013 - present

Reporter/News Director

Aspen Public Radio | 2004-2005 & 2007-2011

Filmmaker

Fleisher Films | 2003 - 2004

National Geographic Television

Producer & Editor | 2001 - 2003

Backroads

Guide | 1994 - 2000



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STRATEGIC PLANNING PHILOSOPHY

CUSTOMIZED



While strategic planning process are very similar, each organization has a unique set of circumstances and culture. A customized approach includes asking the right questions of the right people at the right time and meeting everyone involved where they need to be. Creating opportunities for innovation, creativity and openness during the process is our passion.

PARTICIPATORY



We believe in open and welcoming engagement and outreach. “None of us is as smart as all of us” (Ken Blanchard) is something we often say to explain how diverse voices from internal and external participants can improve the content, understanding, and support for the plan. Those who implement the work in the strategic plan must be involved in the creation and development as well as take ownership roles in outcomes.

ALIGNED AND INTEGRATED



As the roadmap for the future of the organization, the plan strategic must be aligned with the budget and other long range or master plans. Every department strategic plan should also connect to and reflect the organization strategic plan.

FLEXIBLE AND ADAPTABLE



The old style of a linear plan that was created once every ten years based on current knowledge simply doesn't work anymore. Our plans are crafted based on current knowledge, foreseeable trends, potential barriers and challenges, and have as their backbone the ability to adapt and be flexible in times of change. Rigorous but not rigid is a guideline, and regular review and update helps keep the plan tied to reality yet changing with needs.

OWNERS AND CHAMPIONS



The plan will only be successful if there is ownership for the outcomes. A champion for the plan (such as a key staff member) will follow through on a review and update process, remind team members to update information, present reports to the leadership, and keep the plan alive and functioning at the highest level.



PROVEN IMPACT

We often hear, “I don’t see a role for myself/my department in our old strategic plans.” Through a customized participation process, we create ownership and understanding of how every role across the organization has a positive, provable impact on the future. That creates buy in and support for the plan, as well as alignment across the organization.



ACCOUNTABILITY FOR IMPLEMENTATION

A successful plan is a plan that is implemented, and a proven way to guarantee implementation is to create accountability. Using an Implementation Plan process, we ensure that accountability through participation and consensus on the next steps, agreement on the most important objectives and initiatives, and assigning an owner and team to that work.



MEASUREMENTS OF SUCCESS

Only with performance metrics can progress towards achieving goals be set, measured and celebrated. Important yet simple, easy to understand performance measures can be a communication tool externally and internally, with more specific measures of success within each department or division.



REVIEWED AND UPDATED

We leave you with a process and templates for regular review, reporting and updates. This demonstrable progress is a key to making the plan a living document. A regular review allows change and adaptability because consistent review and discussion are taking place at all levels in the organization.



EASY TO COMMUNICATE

The plan document should be created as a way to tell your story and give you a way to communicate clearly and easily what is most important to the organization. We create highly visual documents that capture the imagination and give the most important information in a clear and easy to read way.

WHAT IS FACILITATION?

Think about the biggest dilemma you're currently facing in your organization, the burning questions, the wicked problems, the frustrating issues that you just can't seem to get any traction around....

Now imagine what would it be like to involve your team and work together on the problem in such a way that new ideas emerge? What would it be like to gain new insight from your team's collective wisdom and have the issue you've been stressing over evolve into a collaboratively built vision, the foundation of a solution, supported by your team who will be eager to begin the journey to success?

This is what facilitation does.

And yet, facilitation is an often misunderstood and confusing practice. As professional certified facilitators, we are experts in harnessing the power of participants, empowering individuals, teams, groups, organizations, and communities to create a future of their own making through engaging in intentional conversations. We serve as the guide to solve those wicked problems, resolve deep-seated conflicts, innovate, improve, and thrive.

Professional facilitation involves a process and design methodology. It is the practice of thoughtfully structuring and guiding conversations, dialogues, meetings, events, decision-making processes, and other activities using intentional strategies that help groups converse and collaborate more respectfully and productively. ("Facilitation Principle – Organizing Engagement") *Great facilitation is grounded in the practice of inclusivity, fairness, mutual respect, and shared decision-making.* Participants have the opportunity to listen to, debate and understand the differing perspectives in the room in a structured method that allows respectful consideration and strong consensus.

Facilitation is a skill set: professional certified facilitators have the experience, background, and training to help individuals with different values, beliefs, or cultural backgrounds listen to one another in constructive ways—rather than defaulting to argumentation or stereotyping—which can improve mutual understanding and appreciation for different points of view.

THE BENEFITS OF FACILITATION

The conversations that happen *in* meetings, not the meetings themselves, should be productive, meaningful, and effective. When we create the space for real, collaborative engagement, people do more than just show up for a

meeting. And the results and outcomes are much more than an agreement or a document. Facilitation has amazing impacts in areas such as

- Excitement for the meeting
- Members who are ready to participate and contribute.
- Support and buy in for the outcomes and decisions
- Understanding the process of how the decision was made.
- Improved team morale
- Hearing diverse voices
- Positive working relationships
- Stronger communication
- Higher levels of trust and respect
- Critical thinking skills
- Accountability for the execution and follow through
- Inspiration and innovation
- The “Aha!” moment: Helping participants see things they have never noticed or understood before

The result is a process that participants feel is **inclusive, welcoming, fair, respectful, effective, engaging, fun and well worth their time**. Our facilitation experience has allowed us the honor to see immense change within teams, organization, and communities even in the most challenging of times and passionate of topics. We believe in the power of facilitation to change the current status and change the future in a lasting and positive way.

An additional benefit of working with a professional facilitator is that having someone NOT associated or employed by the organization will allow equity of input and draw out more candid conversations. With established teams, roles are already defined either formally or informally, which creates situations where comments from leaders are deferred to, and conversations can be stilted according to the professional relationships established. With a neutral third-party facilitator, everyone can participate in meetings and outcomes without having to stay within the confines of previously established roles and responsibilities.

OUR FACILITATION PHILOSOPHY

We strongly believe that “none of us is as smart as all of us” and that everyone has the innate ability to collaborate. We trust in the wisdom and abilities of people in the room. We know that when people share their ideas, they build on each other’s concepts, expand their own and each other’s thinking and create new ideas. We believe in applying the rules to everyone equally, treating all participants equitably, and being a behavioral role model.

HOW WE FACILITATE

We collaboratively and thoughtfully design rules and structure, frame topics and issues, pose the right questions, keep track of time, and record the main ideas or outcomes that emerge from a dialogue or process. When needed, we may

take a more active role to keep the discussion focused and moving forward or may intervene when problematic behaviors derail a discussion or compromise the emotional or physical safety of participants.

We provide structure, direction, and guidance to a dialogue or process. To accomplish this, we may ask challenging questions, provide background information, redirect unproductive arguments, request that speakers clarify unclear statements, and contribute in other ways. We use a variety of techniques to engage participants fully, overcome the challenges that might be in the room, and achieve consensus and sustainable success. We don't manage people, issue commands, control discussions, regulate opinions, or determine outcomes.

As facilitators, we want the outcome to derive from the participants within the process – that is, the process is not manipulated to arrive at an outcome that has been determined in advance by those in positions of power or authority. By applying rules to everyone equally, treating all participants equitably, and modeling, demonstrating, and explaining the behaviors expected of all participants, we help groups converse and collaborate more productively so that the eventual outcome—whatever it might be—results from a process that participants feel was inclusive, fair, respectful, and democratic. Our approach also creates buy-in which enables your participants to be the champions of implementation.

OUR FACILITATION PROCESS

In order to help people exercise their innate facilitative abilities, we create specific processes that support collaborative thinking, creativity, inclusivity, and curiosity. The processes are based on an understanding of the creative process, of human nature, of group dynamics and of the generative power of original questions. At time, the processes are simple and easy to apply but many times they are subtle adjustments that require experience, skills, and knowledge to be successful.

STEPS IN OUR FACILITATION PROCESS:

STEP ONE: SCOPE AND PLAN

Purpose

We need to know the “why” of the meeting before we can create the “how.” What is the purpose of this meeting? Why now? What is the intended outcome (a decision, a team building, action steps, creative or innovative ideas)? Is there a deliverable? Have there been past attempts to have these meetings and what was the result? What would be considered success?

People

Having the right people in the room is the most common barrier to success. We encourage a diverse and inclusive view of participants, again with the view that “none of us is as smart as all of us.” Based on our thousands of facilitated meetings, we often brainstorm with clients and help guide a conversation about the benefits and challenges of inviting participants. Once we know who will be attending, we recommend interviewing them prior to the meeting, or gaining some background knowledge of their approach and personalities.

Specific Outcomes of the Meeting

As facilitators, it's important that we know what would be considered a success, and what the priorities for the meeting might be. A question we ask is this, “Imagine for a moment that it is now the day after the meeting, and someone asks you about it: How did it go? Was it successful? You answer: ‘It was the best meeting I could have hoped for! We accomplished everything I wanted and more. I’m thrilled with the outcome.’ What would make you say that or react that way? What happened in the meeting that was so amazing? What did we as facilitators do or accomplish that made you so happy?”

Location and Room

The location of the meeting and the room have a significant effect on the meeting and the participants. Is there enough room to host the meeting? What kind of wall space is available? Are there breakout rooms? Where will food or breaks take place? Is there enough space for team building activities? What is the AV capacity? Are there access needs on the team to consider? Will the design of the room encourage engagement and feel welcoming?

STEP TWO: PREPARE THE PROCESS

Agenda

We collaboratively create an agenda based on all the information gathered in the first steps. The agenda has ground rules, specific topics, and time frames and outlines the tools and techniques that will be used to achieve the outcomes. We have found that the questions we craft, and how we craft

them, have the largest impact on the meeting. We anticipate potential problems, and we always have the ability to pivot and introduce a better tool or technique for the group if needed.

Collaborate on Questions

The design and creation, as well as the method of asking questions during a meeting is truly the difference between mediocre facilitation and amazing facilitation. Once we know the purpose, the people, and the product (outcomes) we collaboratively create the questions that need to be answered during the meeting.

STEP THREE: FACILITATE BASED ON OUR GUIDING PRINCIPLES

Set Up

The meeting room set up is the first thing participants see when they walk into the room. It is welcoming? It is comfortable? Is it inclusive? We pre-create our flip charts, butcher paper and handouts for the meetings prior. We arrive at least one hour early to ensure the AV functions; the room layout is as intended, and all of the materials and supplies are on the tables.

Facilitation

During the meeting we follow our Guiding Principles and the agenda. We make adjustments to time and topics as needed, and document the conversations, actions, and agreements of the group.

STEP FOUR: REPORT AND DOCUMENT

Based on our flip charts, sticky notes, online poll engagement, 3 x 5 cards, butcher paper and all the other methods we have to collect information, we create a report that is easy to read, graphically engaging, and captures the most salient points of the meeting. Having a formalized report shows a tangible result to meeting participants and enables them to continue the work from the meeting.

STEP FIVE: EVALUATE AND REFLECT

Evaluation and Feedback

This is an often-overlooked part of facilitation – to get feedback from the meeting participants. What went well? What was frustrating or confusing? What would they suggest as improvements for the next meeting? Not only is that feedback important for us as facilitators, but it can also help our clients realize how to host better meetings internally as well.

OUR GUIDING PRINCIPLES WHEN WE FACILITATE

PRINCIPLE: Establish a Welcoming, Inclusive and Safe Environment

Participants who feel confident, relaxed, and comfortable will speak up, share their ideas, and engage in potentially difficult or contentious conversations. We pay close attention to physical, emotional, and personal comfort. Choosing the location of the meeting, and even the specific layout of the room can contribute to the overall feeling of the conversation. Setting clear expectations using ground rules and setting the tone for a meeting can intentionally model the behaviors. We specifically demonstrate warmth, openness, curiosity, and a non-judgmental attitude toward all participants. We also monitor emotional cues and responses for signs that participants feel upset, anxious, threatened, or otherwise uncomfortable or distressed. There are several techniques we use to reestablish safety in a variety of ways, such as by calling a break, pulling a participant aside for a one-on-one conversation, or politely but firmly asking certain participants to refrain from making specific comments or engaging in harmful behaviors.

PRINCIPLE: Use an Intentional and Customized Process

We are intentional about creating the process to achieve the purpose of the group. Because we spend time understanding not only the outcomes but also the participants and the project, we craft deliberate and thoughtful exercises using techniques that are proven to work. We carefully craft unique questions that will generate engaged and thorough conversations.

PRINCIPLE: Build Facilitation Capacity within the Group

Because we believe in the innate ability of people, we want to build internal capacity within each organization for the future. Facilitation is a skill set, and we want to leave each team with the tools and techniques they can apply in the very next meeting.

PRINCIPLE: Be a Neutral Guide

As a neutral guide, we don't take sides. In fact, we practice intentional impartiality. We don't agree or disagree with any point of view. We are there to guide the conversation by asking the right questions at the right times and to document exactly what was said during the meeting. We know we are not the subject matter experts in the meeting, and our opinions are not important in a team meeting.

PRINCIPLE: Welcome the Differences

We welcome different points of view and perspectives into the meeting from the very first introduction. Although we do manage conflict and dysfunction, we know how to stay with conflict rather than changing the topic or moving away from the personal point of view when that is helpful to the overall group and not damaging to any participants. Creative, unexpected, and insightful ideas often happen after being able to fully voice opinions and uncomfortable issues.

PRINCIPLE: Share the Power, Honor the Wisdom, and Trust the Participants

We trust that the team has the wisdom and everything else it needs to solve its own problems creatively and innovatively. That means ownership for the participants and a sense of being included. The respect that we offer to the group is also a way to role model the respect we ask for within the meeting.

PRINCIPLE: Hold to the Intention of the Group

We respect the intention of the meeting by focusing on what would serve the team in the long run (based on our understanding of purpose and outcomes). Sometimes there may be resistance from the team about a decision or strong reluctance to move forward to another agenda item, which can mean that there is a topic that's difficult to discuss but needs to be talked about in order for the team to move forward, or it might have more to do with the team's dynamic than it does the topic at hand. We think that having the group struggle like this is beneficial to the process of decision making.

PRINCIPLE: 80/20

We believe that facilitation is at least 80% listening and capturing information. Perhaps 20% is setting the stage, holding to the time frames, enforcing the ground rules, and asking questions.

QUESTIONS WE ASK

We continuously ask ourselves, "How can I best serve the group?" and
"What does this group *really* need right now?"

OUR ROLE AS A FACILITATOR

While our role as professional facilitators changes for each client and adapts in order to achieve the outcomes and work with the unique participants, here are some of the core roles:

BEFORE THE MEETING

- To understand the purpose and intent of the meeting
- To understand the deliverables and outcomes
- To involve the right people and understand who those people are
- To customize the meeting design to the participants and the outcomes
- To understand how to structure a meeting to get results
- To have social and emotional intelligence

DURING THE MEETING

- To recognize the value of the group's time and use it to achieve the desired result
- To stay on time
- To keep the group focused and on target
- To have fun
- To remain unbiased and neutral
- To ask the right questions at the right time
- To be positive and encouraging
- To achieve understanding
- To reach consensus
- To develop next steps
- To listen to understand and listen to learn
- To document what each participant says
- To encourage full and inclusive input from every participant
- To create and maintain a safe and respectful environment
- To manage group dynamics including dysfunctional behavior
- To adapt to the needs of the group and be flexible

AFTER THE MEETING

- To provide documentation of issues, decisions, and actions
- To get feedback from the group on improvements and challenges
- To follow up on any next steps