

Proposal for Consulting Services

Uptown Social Staffing and Organizational Review

City of Sheboygan, Wisconsin | Department of Senior Services

Prepared for Emily Rendall-Araujo, Director of Senior Services | August 4, 2026

Understanding of the Engagement

Uptown Social has grown substantially in the number of people it serves since relocating to its current facility. The department's position descriptions were developed in 2022, before the facility opened, and were necessarily built on projection rather than on observed operations. They have not been validated against how the department functions today.

Staffing has grown incrementally over that period. The department has begun testing expanded operating hours in response to community interest, and the City is working toward a further expansion of the facility.

The City has asked BoldPath to determine what staffing level and structure the department requires given the services it now delivers, to consider the staffing implications of the department's intentions for expanded hours and expanded space, and to translate both into a sequence the City can implement in stages rather than all at once.

Objectives

- Establish an accurate picture of the department's current labor base and service levels, counting all labor sources rather than authorized full-time equivalents alone
- Determine the staffing required to deliver current services, addressing both facility coverage requirements and workload volume
- Assess the current role structure and recommend a structure appropriate to the department's scale, service model, and continuity needs
- Identify the staffing implications of the department's intentions for expanded operating hours and expanded facility space, recognizing that requirements tied to plans still in development can be framed and estimated but not fixed
- Confirm that the department's understanding of its future direction aligns with the City's
- Provide peer context from comparable municipally operated senior centers
- Deliver a phased recommendation the City can act on in stages, distinguishing what current services require from what expanded hours and expanded space would require

Scope of Work

1. Baseline and service profile

BoldPath will establish the department's actual current labor base, including authorized positions and full-time equivalents by title and funding source, part-time and limited-term hours, externally funded positions and their terms, volunteer contribution by function, and any instructor, contract, or facility labor supporting the department.

BoldPath will document current service levels, including operating hours, facility areas in active use, program calendar and volume, participation and attendance patterns, membership definitions and counts, food service, trip and travel programming, rentals and external facility use, and partner programming hosted on site.

2. Fieldwork

BoldPath will conduct structured interviews with department staff, the City Administrator, and other stakeholders as mutually agreed, following a uniform format so that responses can be compared across participants.

The interview with the City Administrator is included specifically to understand the City's vision for Uptown Social and to confirm that the department's view of its future direction and the City's view are aligned. Where a staffing recommendation depends on assumptions about future service levels, those assumptions need to be shared ones. Additional stakeholders may include human resources, finance, or governance representatives whose perspective bears on the department's operating or fiscal context.

Interviews will be consolidated into on-site blocks where scheduling permits, with remote interviews used where it is not practical to gather participants on the same day. This is a deliberate cost-control measure and does not reduce the depth of the conversations.

BoldPath will conduct on-site observation of the department in operation. The purpose is to see directly how the operation runs and how it is configured. Observation frequently reveals what position descriptions and interviews cannot, including how work actually moves through the facility, where staff and volunteers absorb demand informally, and how the physical configuration of the space shapes what any given position can realistically cover. The number and timing of observation periods will be set by mutual agreement.

3. Peer context

BoldPath will develop comparative information from municipally operated senior centers of similar facility scale and service orientation, drawn from Wisconsin and the broader upper Midwest. The comparison set will emphasize activity-oriented centers operated as municipal programs rather than centers whose staffing is driven by state or federal meal-site and social service requirements, since those models are not comparable.

Peer information is offered to inform the conversation rather than to produce a number. It provides a window into how comparable organizations structure and staff themselves, and gives the City a point of perspective when weighing the recommendation.

4. Analysis

BoldPath will examine the range of programs and services the department delivers and the staffing each requires. Some programming occurs within the building during posted hours and draws on general coverage. Other programming requires dedicated staff, occurs outside normal operating hours, or takes staff off site entirely. Each of those patterns creates coverage requirements or gaps the staffing model has to account for, and understanding that mix is necessary before any conclusion about staffing levels is reliable.

BoldPath will analyze minimum coverage requirements, meaning the staffing presence necessary to operate the facility properly during posted hours independent of attendance on any given day, accounting for building size and configuration, simultaneously active spaces, activity and fitness area supervision, front desk and point-of-sale coverage, food service, opening and closing procedures, and functions where a single absence closes a service.

BoldPath will analyze workload against documented service levels, including volunteer recruitment and coordination, internal and external communications, program development and instructor coordination, event and rental administration, setup and teardown, and departmental financial and reporting administration.

BoldPath will assess the current role structure, including whether responsibilities are assigned at appropriate levels, whether the Director carries operational duties that belong elsewhere, whether any single position has accumulated scope beyond what one role can reasonably sustain, and what continuity exposure exists given the concentration of operating knowledge within the department.

5. Recommendation, position descriptions, and phasing

BoldPath will present a recommended staffing model that distinguishes what current services require at current hours, what the expanded hours under consideration would require, and what the anticipated facility expansion would require.

The recommendation is phased by implementation sequence, not by successive rounds of reporting. It will identify the order in which positions should be added and the conditions that would reasonably trigger each step, such as a budget cycle, a reserve or revenue threshold, external funding, or a facility milestone. It will also address funding source separately from position structure, recognizing that a position may be supported by levy, earned revenue, reserves, or external funding without altering its status as a City position.

The recommendation will address role structure and relative leveling, and will identify which changes represent restructuring of existing scope and which require added capacity.

BoldPath will produce up to six updated position descriptions reflecting the recommended structure. Where a recommendation adds a second incumbent to an existing role rather than creating a new one, a single description covers both. The descriptions will be drafted in a form that supports a productive classification review by the City's compensation consultant.

Deliverables

- Written report, delivered in draft for City review and in final form incorporating one consolidated round of City comment, suitable for distribution to City leadership and, if the City chooses, to the Common Council
- Current-state labor baseline reconciling all labor sources
- Recommended staffing model addressing current services, expanded hours, and the anticipated facility expansion
- Role structure recommendation with relative leveling
- Up to six updated position descriptions reflecting the recommended structure
- Phased implementation sequence
- Identification of any operational or administrative practices observed during the engagement that warrant separate attention by the City
- One presentation to a body designated by the City, such as the Senior Services Commission or the Common Council, scheduled at that body's convenience. Additional presentations fall outside this scope and would be arranged separately.

City Responsibilities

- A designated point of contact with authority to coordinate direction, feedback, and approvals

- Access to departmental records relevant to this analysis
- Scheduling of staff interviews and site observation(s) as mutually agreed
- Timely response to information requests and to draft review, and identification of any material that should not appear in a publicly distributed report

Out of Scope

- Full classification and compensation study, external market wage data collection, and salary range development. BoldPath will recommend role structure and relative leveling and will draft position descriptions in a form that supports classification review, but placement of positions within the City's classification and pay structure remains a City decision made with the City's compensation consultant.
- Legal advice and legal representation. Questions requiring legal interpretation are referred to the City Attorney.

Assumptions

- The City provides records relevant to this analysis within agreed timeframes
- Department staff are available for interviews during the fieldwork period
- Recommendations tied to the anticipated facility expansion reflect the project as understood during the engagement and will require revisiting if that project changes materially
- Recommendations address staffing and structure. Decisions regarding funding, budget action, and implementation timing rest with the City

Tentative Timeline

Phase	Period	Output
Kickoff and records request	Late September 2026	Confirmed data set and schedule
Fieldwork and observation	October 2026	Interview and observation record
Peer context development	October to November 2026	Comparative summary
Analysis and model construction	November 2026	Staffing model
Draft report and City review	Early December 2026	Draft report and position descriptions
Final report and presentation	December 2026	Final report and presentation

The engagement begins upon execution of the agreement between the parties. BoldPath will conduct preliminary document review and information gathering as scheduling allows in advance of on-site work. On-site interviews and observation will be scheduled on or after September 21, 2026.

Final delivery on or before December 31, 2026. This schedule positions the recommendation to support the City's budget planning and any interim budget action during 2027.

Fee

BoldPath offers two structures for this engagement. Neither is preferable in the abstract, and the right choice depends on how the City prefers to manage cost and scope.

Fixed project fee: \$16,750

The City knows its cost regardless of the hours required, and BoldPath carries the delivery risk. A fixed fee requires a refined scope and a specific set of deliverables, and the fee includes a reasonable contingency for the risk BoldPath assumes. Travel time is absorbed within the fee. This structure suits a City that values budget certainty and is comfortable holding the scope firm.

Invoiced in installments: twenty-five percent upon execution, twenty-five percent upon completion of fieldwork, twenty-five percent upon delivery of the draft report, and twenty-five percent upon delivery of the final report.

Time and materials: \$225 per hour, estimated 65 to 85 hours

This structure allows the engagement to flex. Where BoldPath finds efficiencies in the work, the City pays less. Where the City's requirements expand during the engagement, the cost moves accordingly. This structure suits a City that expects the scope to develop as the analysis proceeds and prefers to pay for the work actually performed.

BoldPath will notify the City in writing before hours exceed the estimate above, and will not exceed it without written authorization. This protects the City from an open-ended commitment while preserving the flexibility the structure is intended to provide.

The estimate above reflects professional time. On-site work is anticipated to involve approximately three round trips of roughly ninety minutes each. Travel time is billed separately at fifty percent of the hourly rate, consistent with the Consulting Services Agreement. Invoiced monthly for hours worked.

Under either structure, mileage and pre-approved expenses are reimbursed at cost, and services requested outside the scope described above are performed only upon mutual written agreement.

Next Step

If this proposal is acceptable, BoldPath will prepare its standard Consulting Services Agreement, which has been reviewed in connection with prior engagements, and will append this proposal to that agreement as the scope of services. Please indicate which fee structure the City prefers.

If any element of the scope is more or less than the City needs, BoldPath will revise it before the agreement is prepared.

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