

Tenino City Council
2018 City Council Strategic Visioning and Planning Retreat
March 16, 2019

PROPOSED Statement of Work for Doug Mah & Associates, LLC

General description of work: Doug Mah & Associates, in consultation with the Mayor and the Clerk /Treasure for the City of Tenino, will assist in the retreat planning and provide small group facilitation services for a half day City Council strategic visioning, investing, budgeting, and planning retreat scheduled on March 16, 2019. High level deliverables and outcomes include; 1) reaffirm the city’s shared vision; 2) organizational self-assessment based on the Oklahoma Municipal Assurance Group Recognition Program; 3) reaffirm the set of shared investment principles; and 4) the framework for an annual work plan. The City agrees to provide equipment and physical space to conduct the in-person retreat. Specific work items and tasks include:

Task 1. Participating in retreat planning meetings with Mayor and Clerk/Treasure.

Activities: Set facilitator expectations and anticipated outcomes and deliverables for the retreat. Assumes one meeting prior to the board retreat.

Deliverables: Establishing the retreat agenda, activities, and methods for achieving expected deliverables and outcomes.

Task 2. Conducting phone interviews with individual councilmembers.

Activities: Interview Councilmembers to identify individual areas of strategic focus, investment and financial concerns, and aspirations for the retreat and planning efforts.

Deliverables: Gather and document insights and observation about Council expectations.

Task 3. Attend and facilitate Council and stakeholder discussions during the retreat.

Activities: Create an environment where respectful, creative, and meaningful dialog and decision making can occur, provide a forum for the group to exchange insights and information.

Deliverables: Establish a shared understanding regarding the strategic visioning and planning for the City, City Council, and other stakeholders. Facilitate the Council’s organizational self-assessment, reaffirm of the shared vision and shared investment principles, and formulate an annual work plan.

Task 4. Participating in post-retreat assessment meeting with Mayor and Clerk/Treasure.

Activities: Review comments and insights obtained from the retreat. Assumes one meeting following the retreat.

Deliverables: Provide final documentation and discuss next steps to implement the retreat outcomes.

Doug Mah & Associates' fee to provide the above work items: \$1,600.00

Task / Item	Quantity	Hours	Rate	Amount
Task 1 – Meet w/ Mayor & Clerk	1	1.5	\$160 / hr	240.00
Task 2 – Phone interviews w/ city council	5	0.5	\$160 / hr	400.00
Task 3 – Facilitate planning retreat.	1	6	\$160 / hr	960.00
Task 3a – Document retreat outcomes	1	1	\$160 / hr	160.00
Task 4 – Meet w/ Mayor & Clerk	1	1.5	\$160 / hr	240.00
In-kind community discount for the City of Tenino				- 400.00
TOTAL				\$1,600.00

Submitted: February 21, 2018