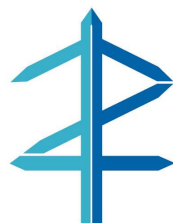


7/1/2025

Proposal:
Watertown
Redevelopment Authority
(RDA)

POISED® Strategic Plan for 2025



Partner²Learn

Guide. Elevate. Transform.

POISED® Consulting Assessment Process

Following the POISED process, Partner2Learn® will collaborate with Watertown Redevelopment Authority (RDA) to align its mission, vision, and values with the organizational culture it aspires to cultivate. When culture is aligned with the team and the broader community needs, leadership can focus more effectively on driving strategic growth, enhancing operational excellence, and delivering meaningful impact across the region.

The POISED model is comprised of the following elements:

People: Each person possesses unique talents, and a strong organizational culture relies on these strengths.

Octane: This is the fuel additive to increase performance and transform leaders.

Identify: Review of all priorities, opportunities, and key metrics to optimize resources.

Strategy: This is the conversion of organizational vision into actions that enable the mission and organization growth.

Engine of Profitability: Imperative to fund growth and win strategy.

Do: Determines the rhythm of the business for sustained and elevated success.

Initial proposed services:

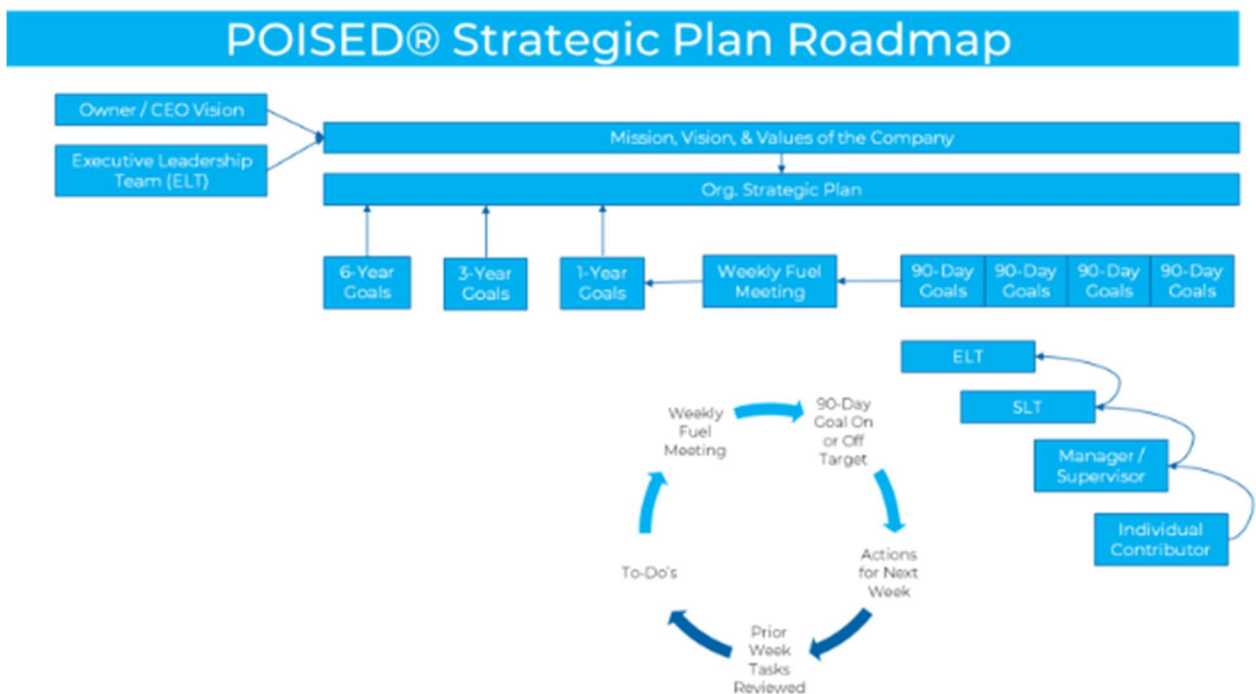
During the StrengthsFirst and Strategic Planning sessions, expect to learn how Partner2Learn is different than other strengths and strategic planning coaches. We have a unique approach to team building and strategic planning which you will experience through the entire process.

POISED Strategic Planning:

Through a 12-hour session, we will develop a robust POISED Strategic Plan with complete understanding and ownership by every team member. These efforts will result in greater alignment, engagement, fit, efficiency, and overall positive results.

The team will be focused on aligning their mission and vision and how this alignment will be imbedded into the team strategy through this strategic planning session. A methodology and process will be refreshed to set goals every 90-days along with one, three, and six-year projections outlining where you need to be to meet your objectives. This process will create a plan to focus the following items:

- Mission, Vision, and Values
- Financial challenges and opportunities
- Engagement
- Strategic thoughts on board development projects



This strategic planning process will result in a succinct and easy to understand document for the team to reference in every team meeting. This plan is a living document to be reviewed and revised every quarter. To support the leadership team, Partner2Learn will engage the team with best practices on how to continuously leverage the strategic plan in meetings and provide coaching when adjustments are needed throughout the year.

Following the strategic planning sessions, Partner2Learn will participate in the first two FUEL meetings to provide feedback and assistance with facilitation for well run, effective, and engaging meetings. In each 2-hour quarterly review of the goals Partner2Learn will participate to ensure alignment of the process and on-going support, and we will walk with you in your 4-hour annual meeting to set all into place for the next year of sustained success (set new 1-year goals and 90-day goals along with strengths review and team culture building).

The team will also take away real and practical resources to continuously improve, carry out, and live the plan. These resources will include Alignment-Engagement-Fit (AEF), Driving Business Solutions (DBS), and other resources to be determined.

Part 2: Additional services that may be provided based on the outcomes of the POISED Strategic Planning process in Part 2 may include the following:

- Mission, Vision, Values (MV²) activity
- 360 Review facilitation for key members
- Good Board Governance process to ensure strong board leadership
- Virtue-based Transformational Leadership models of DICE and the 4R model
- 5 Essentials of a Team – Trust, Positive Conflict, Commitment, Accountability, and Results

Investment:

The outline for optimal proposed services would be as follows. Doing all this would ensure the greatest success and increased engagement, efficiency, and overall impact for Watertown RDA.

1. Complete the 12-hour POISED Strategic Planning session.
2. Walk with you for the first two 90-minute Fuel Meetings.
3. Lead you through three 90-day goal reset meetings
4. Conduct the annual reset meeting

Total Investment = \$21,500

Client agrees to reimburse Partner2Learn for reasonable travel expenses. Travel expenses will be submitted to client for expense reimbursement quarterly and are not included in the fees described in the investment section.

Payment Terms:

Partner2Learn will invoice the client for 50% of the fees for the services listed above, due 30 days following acceptance of this proposal. The remaining balance of services provided will be invoiced at the end of each quarter during the term of this agreement for the applicable fees calculated during the quarter.

The client will provide contact information about the individual who should receive all invoices. This proposal is valid for 30 days. Any modifications to this proposal must be made in writing and agreed to by both parties.

All materials and instruments used by the coaches during this process are proprietary and are not to be distributed to others outside of your organization unless done with written consent of Partner2Learn.

Thank you for the opportunity to serve.

PROPOSAL AGREED AND ACCEPTED: Client – Watertown RDA

Signature: _____

Name: _____

Title: _____

Date: _____

Who is Partner2Learn?

Mission: To guide transformational growth in leadership development, elevating engagement and performance of individuals, teams, and organizations.

Vision: To serve with purpose, making a difference in our employees and clients' lives so they positively impact others, enabling strong employee engagement, development, and organizational success.

Values:

1. Servant leadership - partnering to serve and support our clients, making a positive difference in their lives
2. Transparency - communicating with others openly and honestly, to address issues, tensions, and challenges through productive dialogue and positive conflict
3. Continuous improvement – willingness to continue identifying ways to improve outcomes and holding everyone accountable to exceed expectations
4. Earned trust – focus on developing and maintaining vulnerability-based trust with all
5. Resiliency - spiritual/emotional/physical – take care of ourselves so we can best achieve our mission and serve others as we are all being stretched while bouncing back to healthy form
6. Commitment – We will support and collaborate with our colleagues and partners to live by our values and achieve our mission and vision, while moving forward together for the success of all

Strategic Direction: We partner with small to mid-size business owners and senior leaders across all industries including many charter and private schools, providing customized coaching to serve both the leaders and employees of these organizations. Partner2Learn continues to develop an innovative technology division to create game-changing software and tools to provide internal and external users better ways to engage the strengths of their employees. We will have on-going reviews to build on the core offerings, while incubating new growth areas at an appropriate pace.

Facilitators:

Dr. Scott Gostchock – Partner2Learn Co-Founder

In his 30+ years of educational and community service, Scott has served cross-cultural, inner city, and urban education settings as a teacher, administrator, and community activist. He has also served as a full-time professor of education and currently is an adjunct professor for a number of universities and colleges. These unique settings and wealth of experiences have provided a tremendous backdrop for Scott's educational presentations on CliftonStrengths, transformative leadership, executive coaching, and global leadership..

Top Strengths: Relator, Achiever, Responsibility, Learner, Discipline, Communication, Individualization, Belief

Education: Bachelor's, Dr. Martin Luther College; Master's in Education, Brenau University; Ed. D. in Leadership, Nova Southeastern University

Tiffany Weigand – Partner2Learn Co-Founder

In her 20+ years of marketing, branding and consulting, Tiffany has served regional and global organizations in numerous industries, including manufacturing, education, municipalities, healthcare, senior living, small business and nonprofit. Tiffany's Gallup Certification and experience presenting to senior leaders and company owners with a focus on real life solutions and humor has added tremendous value to her clients.

Top Strengths: Focus, Responsibility, Analytical, Relator, Consistency, Discipline, Significance, Deliberative

Education: Bachelor's in Marketing, UW-La Crosse; MBA, Marquette University

Dan Weigand – Partner2Learn CEO

In his 20+ years in the financial services industry, Dan has been identifying and creating efficiencies through process automation, while sharing his expertise with others. His analytical, strategic and ideation strengths provide an ability to see the entire picture, both ultra short-term and long-term challenges and opportunities, when creating and implementing strategic objectives and entire plans.

Top Strengths: Achiever, Ideation, Futuristic, Relator, Learner, Competition, Strategic, Analytical

Education: Bachelor's in Finance, UW-Milwaukee; MBA, University of Wisconsin