AGREEMENT FOR SERVICES BETWEEN
THE CITY OF MENLO PARK AND THE MEJORANDO GROUP

THIS AGREEMENT made and entered into at Menlo Park, California, this 8th day of August, 2019, by and between the CITY OF MENLO PARK, a Municipal Corporation, hereinafter referred to as "CITY," and THE MEJORANDO GROUP, hereinafter referred to as "FIRST PARTY."

WITNESSETH:

WHEREAS, CITY desires to retain FIRST PARTY to provide certain professional services for CITY in connection with that certain project called: City of Menlo Park - mini-conference series

WHEREAS, FIRST PARTY is licensed to perform said services and desires to and does hereby undertake to perform said services.

NOW, THEREFORE, IN CONSIDERATION OF THE MUTUAL COVENANTS, PROMISES AND CONDITIONS of each of the parties hereto, it is hereby agreed as follows:

1. SCOPE OF WORK

In consideration of the payment by CITY to FIRST PARTY, as hereinafter provided, FIRST PARTY agrees to perform all the services as set forth in Exhibit "A," Scope of Services.

2. SCHEDULE FOR WORK

FIRST PARTY's proposed schedule for the various services required pursuant to this agreement will be as set forth in Exhibit "A," Scope of Services. CITY will be kept informed as to the progress of work by written reports, to be submitted monthly or as otherwise required in Exhibit "A." Neither party shall hold the other responsible for damages or delay in performance caused by acts of God, strikes, lockouts, accidents or other events beyond the control of the other, or the other's employees and agents.

FIRST PARTY shall commence work immediately upon receipt of a "Notice to Proceed" from CITY. The "Notice to Proceed" date shall be considered the "effective date" of the agreement, as used herein, except as otherwise specifically defined. FIRST PARTY shall complete all the work and deliver to CITY all project related files, records, and materials within one month after completion of all of FIRST PARTY's activities required under this agreement.

3. PROSECUTION OF WORK

FIRST PARTY will employ a sufficient staff to prosecute the work diligently and continuously and will complete the work in accordance with the schedule of work approved by the CITY. (See Exhibit "A," Scope of Services).
4. COMPENSATION AND PAYMENT

A. CITY shall pay FIRST PARTY an all-inclusive fee that shall not exceed $5,400 as described in Exhibit "A," Scope of Services. This compensation shall be based on the rates described in Exhibit "A." All payments, including fixed hourly rates, shall be inclusive of all indirect and direct charges to the Project incurred by FIRST PARTY. The CITY reserves the right to withhold payment if the City determines that the quantity or quality of the work performed is unacceptable.

B. FIRST PARTY's fee for the services as set forth herein shall be considered as full compensation for all indirect and direct personnel, materials, supplies and equipment, and services incurred by FIRST PARTY and used in carrying out or completing the work.

C. Payments shall be monthly for the invoice amount or such other amount as approved by CITY. As each payment is due, the FIRST PARTY shall submit a statement describing the services performed to CITY. This statement shall include, at a minimum, the project title, agreement number, the title(s) of personnel performing work, hours spent, payment rate, and a listing of all reimbursable costs. CITY shall have the discretion to approve the invoice and the work completed statement. Payment shall be for the invoice amount or such other amount as approved by CITY.

D. Payments are due upon receipt of written invoices. CITY shall have the right to receive, upon request, documentation substantiating charges billed to CITY. CITY shall have the right to perform an audit of the FIRST PARTY's relevant records pertaining to the charges.

5. EQUAL EMPLOYMENT OPPORTUNITY

A. FIRST PARTY, with regard to the work performed by it under this agreement shall not discriminate on the grounds of race, religion, color, national origin, sex, handicap, marital status or age in the retention of sub-consultants, including procurement of materials and leases of equipment.

B. FIRST PARTY shall take affirmative action to insure that employees and applicants for employment are treated without regard to their race, color, religion, sex, national origin, marital status or handicap. Such action shall include, but not be limited to the following: employment, upgrading, demotion, or transfer; recruitment advertising; layoff or termination; rates of pay or other forms of compensation and selection for training including apprenticeship.

C. FIRST PARTY shall post in prominent places, available to employees and applicants for employment, notices setting forth the provisions of this non-discrimination clause.

D. FIRST PARTY shall state that all qualified applications will receive consideration for employment without regard to race, color, religion, sex, national origin, marital status or handicap.

E. FIRST PARTY shall comply with Title VI of the Civil Rights Act of 1964 and shall provide such reports as may be required to carry out the intent of this section.

F. FIRST PARTY shall incorporate the foregoing requirements of this section in FIRST PARTY's agreement with all sub-consultants.

6. ASSIGNMENT OF AGREEMENT AND TRANSFER OF INTEREST

A. FIRST PARTY shall not assign this agreement, and shall not transfer any interest in the same (whether by assignment or novation), without prior written consent of the CITY thereto, provided, however, that claims for money due or to become due to the FIRST PARTY from the CITY under this agreement may be assigned to a bank, trust company, or other financial institution without such approval. Notice of an intended assignment or transfer shall be furnished promptly to the CITY.

B. In the event there is a change of more than 30 percent of the stock ownership or ownership in FIRST PARTY from the date of this agreement is executed, then CITY shall be notified before the date of said change of stock ownership or interest and CITY shall have the right, in event of such change in stock ownership or interest, to terminate this agreement upon notice to FIRST PARTY. In the event CITY is not notified of any such change in stock ownership or interest, then upon knowledge of same, it shall be deemed that CITY has terminated this agreement.
7. INDEPENDENT WORK CONTROL

It is expressly agreed that in the performance of the service necessary for compliance with this agreement, FIRST PARTY shall be and is an independent contractor and is not an agent or employee of CITY. FIRST PARTY has and shall retain the right to exercise full control and supervision of the services and full control over the employment, direction, compensation and discharge of all persons assisting FIRST PARTY in the performance of FIRST PARTY’s services hereunder. FIRST PARTY shall be solely responsible for its own acts and those of its subordinates and employees.

8. CONSULTANT QUALIFICATIONS

It is expressly understood that FIRST PARTY is licensed and skilled in the professional calling necessary to perform the work agreed to be done by it under this agreement and CITY relies upon the skill of FIRST PARTY to do and perform said work in a skillful manner usual to the profession. The acceptance of FIRST PARTY’s work by CITY does not operate as a release of FIRST PARTY from said understanding.

9. NOTICES

All notices hereby required under this agreement shall be in writing and delivered in person or sent by certified mail, postage prepaid or by overnight courier service. Notices required to be given to CITY shall be addressed as follows:

Theresa DellaSanta, Human Resources Manager
Administrative Services Department
City of Menlo Park
701 Laurel St.
Menlo Park, CA 94025
650-330-6672
tndellasanta@menlopark.org

Notices required to be given to FIRST PARTY shall be addressed as follows:
Patrick Ibarra
The Mejorando Group
7409 North 84th Avenue
Glendale, AZ 85305
925-518-0187
patrick@gettingbetterallthetime.com

Provided that any party may change such address by notice, in writing, to the other party and thereafter notices shall be addressed and transmitted to the new address.

10. HOLD HARMLESS

The FIRST PARTY shall defend, indemnify and hold harmless the CITY, its subsidiary agencies, their officers, agents, employees and servants from all claims, suits or actions that arise out of, pertain to, or relate to the negligence, recklessness, or willful misconduct of the FIRST PARTY brought for, or on account of, injuries to or death of any person or damage to property resulting from the performance of any work required by this agreement by FIRST PARTY, its officers, agents, employees and servants. Nothing herein shall be construed to require the FIRST PARTY to defend, indemnify or hold harmless the CITY, its subsidiary agencies, their officers, agents, employees and servants against any responsibility to liability in contravention of Section 2782.8 of the California Civil Code.
11. INSURANCE

A. FIRST PARTY shall not commence work under this agreement until all insurance required under this Section has been obtained and such insurance has been approved by the City, with certificates of insurance evidencing the required coverage.

B. There shall be a contractual liability endorsement extending the FIRST PARTY's coverage to include the contractual liability assumed by the FIRST PARTY pursuant to this agreement. These certificates shall specify or be endorsed to provide that thirty (30) days' notice must be given, in writing, to the CITY, at the address shown in Section 9, of any pending cancellation of the policy. FIRST PARTY shall notify CITY of any pending change to the policy. All certificates shall be filed with the City.

1. Workers' compensation and employer's liability insurance:
The FIRST PARTY shall have in effect during the entire life of this agreement workers' compensation and Employer's Liability Insurance providing full statutory coverage. In signing this agreement, the FIRST PARTY makes the following certification, required by Section 3700 of the California Labor Code: "I am aware of the provisions of Section 3700 of the California Labor Code which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of the Code, and I will comply with such provisions before commencing the performance of the work of this agreement" (not required if the FIRST PARTY is a Sole Proprietor).

2. Liability insurance:
The FIRST PARTY shall take out and maintain during the life of this agreement such Bodily Injury Liability and Property Damage Liability Insurance (Commercial General Liability Insurance) on an occurrence basis as shall protect it while performing work covered by this agreement from any and all claims for damages for bodily injury, including accidental death, as well as claims for property damage which may arise from the FIRST PARTY's operations under this agreement, whether such operations be by FIRST PARTY or by any sub-consultant or by anyone directly or indirectly employed by either of them. The amounts of such insurance shall be not less than one million dollars ($1,000,000) per occurrence and one million dollars ($1,000,000) in aggregate, or one million dollars ($1,000,000) combined single limit bodily injury and property damage for each occurrence. FIRST PARTY shall provide the CITY with acceptable evidence of coverage, including a copy of all declarations of coverage exclusions. FIRST PARTY shall maintain Automobile Liability Insurance pursuant to this agreement in an amount of not less than one million dollars ($1,000,000) for each accident combined single limit or not less than one million dollars ($1,000,000) for any one (1) person, and one million dollars ($1,000,000) for any one (1) accident, and Three Hundred Thousand Dollars, ($300,000) property damage.

3. Professional liability insurance:
FIRST PARTY shall maintain a policy of professional liability insurance, protecting it against claims arising out of the negligent acts, errors, or omissions of FIRST PARTY pursuant to this agreement, in the amount of not less than one million dollars ($1,000,000) per claim and in the aggregate. Said professional liability insurance is to be kept in force for not less than one (1) year after completion of services described herein.

C. CITY and its subsidiary agencies, and their officers, agents, employees and servants shall be named as additional insured on any such policies of Commercial General Liability and Automobile Liability Insurance, (but not for the Professional Liability and workers' compensation), which shall also contain a provision that the insurance afforded thereby to the CITY, its subsidiary agencies, and their officers, agents, employees, and servants shall be primary insurance to the full limits of liability of the policy, and that if the CITY, its subsidiary agencies and their officers and employees have other insurance against a loss covered by a policy, such other insurance shall be excess insurance only.

D. In the event of the breach of any provision of this Section, or in the event any notice is received which indicates any required insurance coverage will be diminished or canceled, CITY, at its option, may, notwithstanding any other provision of this agreement to the contrary, immediately declare a material breach of this agreement and suspend all further work pursuant to this agreement.

E. Before the execution of this agreement, any deductibles or self-insured retentions must be declared to and approved by CITY.
12. PAYMENT OF PERMITS/LICENSES

Contractor shall obtain any license, permit, or approval if necessary from any agency whatsoever for the work/services to be performed, at his/her own expense, before commencement of said work/services or forfeit any right to compensation under this agreement.

13. RESPONSIBILITY AND LIABILITY FOR SUB-CONSULTANTS AND/OR SUBCONTRACTORS

Approval of or by CITY shall not constitute nor be deemed a release of responsibility and liability of FIRST PARTY or its sub-consultants and/or subcontractors for the accuracy and competency of the designs, working drawings, specifications or other documents and work, nor shall its approval be deemed to be an assumption of such responsibility by CITY for any defect in the designs, working drawings, specifications or other documents prepared by FIRST PARTY or its sub-consultants and/or subcontractors.

14. OWNERSHIP OF WORK PRODUCT

Work products of FIRST PARTY for this project, which are delivered under this agreement or which are developed, produced and paid for under this agreement, shall become the property of CITY. The reuse of FIRST PARTY’s work products by City for purposes other than intended by this agreement shall be at no risk to FIRST PARTY.

15. REPRESENTATION OF WORK

Any and all representations of FIRST PARTY, in connection with the work performed or the information supplied, shall not apply to any other project or site, except the project described in Exhibit "A" or as otherwise specified in Exhibit "A."

16. TERMINATION OF AGREEMENT

A. CITY may give thirty (30) days written notice to FIRST PARTY, terminating this agreement in whole or in part at any time, either for CITY's convenience or because of the failure of FIRST PARTY to fulfill its contractual obligations or because of FIRST PARTY's change of its assigned personnel or the project without prior CITY approval. Upon receipt of such notice, FIRST PARTY shall:
   1. Immediately discontinue all services affected (unless the notice directs otherwise); and
   2. Deliver to the CITY all data, drawings, specifications, reports, estimates, summaries, and such other information and materials as may have been accumulated or produced by FIRST PARTY in performing work under this agreement, whether completed or in process.

B. If termination is for the convenience of CITY, an equitable adjustment in the contract price shall be made, but no amount shall be allowed for anticipated profit on unperformed services.

C. If the termination is due to the failure of FIRST PARTY to fulfill its agreement, CITY may take over the work and prosecute the same to completion by agreement or otherwise. In such case, FIRST PARTY shall be liable to CITY for any reasonable additional cost occasioned to the CITY thereby.

D. If, after notice of termination for failure to fulfill agreement obligations, it is determined that FIRST PARTY had not so failed, the termination shall be deemed to have been effected for the convenience of the CITY. In such event, adjustment in the contract price shall be made as provided in Paragraph B of this Section.

E. The rights and remedies of the CITY provided in this Section are in addition to any other rights and remedies provided by law or under this agreement.

F. Subject to the foregoing provisions, the CITY shall pay FIRST PARTY for services performed and expenses incurred through the termination date.

CC Rev 20180906
17. INSPECTION OF WORK

It is FIRST PARTY’s obligation to make the work product available for CITY’s inspections and periodic reviews upon request by CITY.

18. COMPLIANCE WITH LAWS

It shall be the responsibility of FIRST PARTY to comply with all State and Federal Laws applicable to the work and services provided pursuant to this agreement, including but not limited to compliance with prevailing wage laws, if applicable.

19. BREACH OF AGREEMENT

A. This agreement is governed by applicable federal and state statutes and regulations. Any material deviation by FIRST PARTY for any reason from the requirements thereof, or from any other provision of this agreement, shall constitute a breach of this agreement and may be cause for termination at the election of the CITY.

B. The CITY reserves the right to waive any and all breaches of this agreement, and any such waiver shall not be deemed a waiver of any previous or subsequent breaches. In the event the CITY chooses to waive a particular breach of this agreement, it may condition same on payment by FIRST PARTY of actual damages occasioned by such breach of agreement.

20. SEVERABILITY

The provisions of this agreement are severable. If any portion of this agreement is held invalid by a court of competent jurisdiction, the remainder of the agreement shall remain in full force and effect unless amended or modified by the mutual consent of the parties.

21. CAPTIONS

The captions of this agreement are for convenience and reference only and shall not define, explain, modify, limit, exemplify, or aid in the interpretation, construction, or meaning of any provisions of this agreement.

22. LITIGATION OR ARBITRATION

In the event that suit or arbitration is brought to enforce the terms of this agreement, the prevailing party shall be entitled to litigation costs and reasonable attorneys’ fees. The Dispute Resolution provisions are set forth on Exhibit “B,” ‘Dispute Resolution’ attached hereto and by this reference incorporated herein.

23. RETENTION OF RECORDS

Contractor shall maintain all required records for three years after the City makes final payment and all other pending matters are closed, and shall be subject to the examination and /or audit of the City, a federal agency, and the state of California.

24. TERM OF AGREEMENT

This agreement shall remain in effect for the period of August 23, 2019 through August 23, 2019 unless extended, amended, or terminated in writing by CITY.
25. ENTIRE AGREEMENT

This document constitutes the sole agreement of the parties hereto relating to said project and states the rights, duties, and obligations of each party as of the document's date. Any prior agreement, promises, negotiations, or representations between parties not expressly stated in this document are not binding. All modifications, amendments, or waivers of the terms of this agreement must be in writing and signed by the appropriate representatives of the parties to this agreement.

26. STATEMENT OF ECONOMIC INTEREST

Consultants, as defined by Section 18701 of the Regulations of the Fair Political Practices Commission, Title 2, Division 6 of the California Code of Regulations, are required to file a Statement of Economic Interests with 30 days of approval of a contract services agreement with the City of its subdivisions, on an annual basis thereafter during the term of the contract, and within 30 days of completion of the contract.

Based upon review of the Consultant's Scope of Work and determination by the City Manager, it is determined that Consultant IS required to file a Statement of Economic Interest. A statement of Economic Interest shall be filed with the City Clerk's office no later than 30 days after the execution of the agreement.

IN WITNESS WHEREOF, the parties hereto have executed this agreement on the day and year first above written.

FOR FIRST PARTY:

Signature
Patrick Ibarra
Printed name
20-4994822
Tax ID#

APPROVED AS TO FORM:

William L. McClure, City Attorney

FOR CITY OF MENLO PARK:

Theresa Dellasanta, Human Resources Manager

ATTEST:

Judi A. Herren, City Clerk

Date
7/10/19
Owner

Date
8/13/19
Title

Date
8/19/19

Date
8/13/19

CC Rev 20180906
**EXHIBIT “A” – SCOPE OF SERVICES**

<table>
<thead>
<tr>
<th>A1. SCOPE OF WORK</th>
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| FIRST PARTY agrees to provide consultant services for CITY's Administrative Services Department. In the event of any discrepancy between any of the terms of the FIRST PARTY's proposal and those of this agreement, the version most favorable to the CITY shall prevail. FIRST PARTY shall provide the following services:  

Provide general consultant services for projects as determined by the CITY. The detailed scope of work for each task the CITY assigns the consultant shall be referred to as Exhibit A-1, which will become part of this agreement. A notice to proceed will be issued separately for each separate scope of work agreed to between the CITY and FIRST PARTY.  

FIRST PARTY agrees to perform these services as directed by the CITY in accordance with the standards of its profession and CITY's satisfaction. |

<table>
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<tr>
<th>A2. COMPENSATION</th>
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| CITY hereby agrees to pay FIRST PARTY at the rates to be negotiated between FIRST PARTY and CITY as detailed in Exhibit A-1. The actual charges shall be based upon (a) FIRST PARTY's standard hourly rate for various classifications of personnel; (b) all fees, salaries and expenses to be paid to engineers, consultants, independent contractors, or agents employed by FIRST PARTY; and shall (c) include reimbursement for mileage, courier and plan reproduction. The total fee for each separate Scope of Work agreed to between the CITY and FIRST PARTY shall not exceed the amount shown in Exhibit A-1.  

FIRST PARTY shall be paid within thirty (30) days after approval of billing for work completed and approved by the CITY. Invoices shall be submitted containing all information contained in Section A5 below. In no event shall FIRST PARTY be entitled to compensation for extra work unless an approved change order, or other written authorization describing the extra work and payment terms, has been executed by CITY before the commencement of the work. |

<table>
<thead>
<tr>
<th>A3. SCHEDULE OF WORK</th>
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<tbody>
<tr>
<td>FIRST PARTY's proposed schedule for the various services required will be set forth in Exhibit A-1.</td>
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</tbody>
</table>

<table>
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<tr>
<th>A4. CHANGES IN WORK -- EXTRA WORK</th>
</tr>
</thead>
</table>
| In addition to services described in Section A1, the parties may from time to time agree in writing that FIRST PARTY, for additional compensation, shall perform additional services including but not limited to:  

- Change in the services because of changes in scope of the work.  
- Additional tasks not specified herein as required by the CITY.  

The CITY and FIRST PARTY shall agree in writing to any changes in compensation and/or changes in FIRST PARTY's services before the commencement of any work. If FIRST PARTY deems work he/she has been directed to perform is beyond the scope of this agreement and constitutes extra work, FIRST PARTY shall immediately inform the CITY in writing of the fact. The CITY shall make a determination as to whether such work is in fact beyond the scope of this agreement and constitutes extra work. In the event that the CITY determines that such work does constitute extra work, it shall provide compensation to the FIRST PARTY in accordance with an agreed cost that is fair and equitable. This cost will be mutually agreed upon by the CITY and FIRST PARTY. A supplemental agreement providing for such compensation for extra work shall be negotiated between the CITY and the FIRST PARTY. Such supplemental agreement shall be executed by the FIRST PARTY and may be approved by the City Manager upon recommendation of the Human Resources Manager. |
A5. BILLINGS

FIRST PARTY’s bills shall include the following information: A brief description of services performed, project title and the agreement number; the date the services were performed; the number of hours spent and by whom; the current contract amount; the current invoice amount; Except as specifically authorized by CITY, FIRST PARTY shall not bill CITY for duplicate services performed by more than one person. In no event shall FIRST PARTY submit any billing for an amount in excess of the maximum amount of compensation provided in Section A2.

The expenses of any office, including furniture and equipment rental, supplies, salaries of employees, telephone calls, postage, advertising, and all other expenses incurred by FIRST PARTY in the performances of this agreement shall be incurred at the FIRST PARTY’s discretion. Such expenses shall be FIRST PARTY’s sole financial responsibility.
EXHIBIT “B” - DISPUTE RESOLUTION

B1.0 All claims, disputes and other matters in question between the FIRST PARTY and CITY arising out of, or relating to, the contract documents or the breach thereof, shall be resolved as follows:

B2.0 Mediation
B2.1 The parties shall attempt in good faith first to mediate such dispute and use their best efforts to reach agreement on the matters in dispute. After a written demand for non-binding mediation, which shall specify in detail the facts of the dispute, and within ten (10) days from the date of delivery of the demand, the matter shall be submitted to a mutually agreeable mediator. The Mediator shall hear the matter and provide an informal opinion and advice, none of which shall be binding upon the parties, but is expected by the parties to help resolve the dispute. Said informal opinion and advice shall be submitted to the parties within twenty (20) days following written demand for mediation. The Mediator’s fee shall be shared equally by the parties. If the dispute has not been resolved, the matter shall be submitted to arbitration in accordance with Paragraph B3.1.

B3.0 Arbitration
B3.1 Any dispute between the parties that is to be resolved by arbitration as provided in Paragraph B2.1 shall be settled and decided by arbitration conducted by the American Arbitration Association in accordance with the Construction Industry Arbitration Rules of the American Arbitration Association, as then in effect, except as provided below. Any such arbitration shall be held before three arbitrators who shall be selected by mutual agreement of the parties; if agreement is not reached on the selection of the arbitrators within fifteen (15) days, then such arbitrator(s) shall be appointed by the presiding Judge of the court of jurisdiction of the agreement.

B3.2 The provisions of the Construction Industry Arbitration Rules of the American Arbitration Association shall apply and govern such arbitration, subject, however to the following:
B3.3 Any demand for arbitration shall be writing and must be made within a reasonable time after the claim, dispute or other matter in question as arisen. In no event shall the demand for arbitration be made after the date that institution of legal or equitable proceedings based on such claim, dispute or other matter would be barred by the applicable statute of limitations.
B3.4 The arbitrator or arbitrators appointed must be former or retired judges, or attorneys at law with last ten (10) years’ experience in construction litigation.
B3.5 All proceedings involving the parties shall be reported by a certified shorthand court reporter, and written transcripts of the proceedings shall be prepared and made available to the parties.
B3.6 The arbitrator or arbitrators must be made within and provide to the parties factual findings and the reasons on which the decisions of the arbitrator or arbitrators is based.
B3.7 Final decision by the arbitrator or arbitrators must be made within ninety (90) days from the date of the arbitration proceedings are initiated.
B3.8 The prevailing party shall be awarded reasonable attorneys’ fees, expert and non-expert witness costs and expenses, and other costs and expenses incurred in connection with the arbitration, unless the arbitrator or arbitrators for good cause determine otherwise.
B3.9 Costs and fees of the arbitrator or arbitrators shall be borne by the non-prevailing party, unless the arbitrator or arbitrators for good cause determine otherwise.
B3.10 The award or decision of the arbitrator or arbitrators, which may include equitable relief, shall be final, and judgment may be entered on it in accordance with applicable law in any court having jurisdiction over the matter.
## 2. EXHIBIT B. PRICING FORM

<table>
<thead>
<tr>
<th>Description/Component</th>
<th>Unit</th>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completion of Rapid Results Performance Needs Assessment documented in a Written Report</td>
<td></td>
<td></td>
<td>$11,000</td>
</tr>
<tr>
<td>Delivery of two ½ day workshops – factoring in one in morning and second in afternoon, regardless of topic. The grand total depends upon the number of training workshops selects.</td>
<td></td>
<td></td>
<td>$4,200 – full day</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$2,900 – ½ day</td>
</tr>
<tr>
<td>Provision of Coaching Services</td>
<td></td>
<td></td>
<td>$275 hourly</td>
</tr>
<tr>
<td>Fee for Facilitation of full-day Executive Team Retreat/Advance session</td>
<td></td>
<td></td>
<td>$4,500</td>
</tr>
<tr>
<td>Administer 360-degree assessment services</td>
<td></td>
<td></td>
<td>Dependent upon number of participants</td>
</tr>
</tbody>
</table>

Sales Tax: NA

Total: Dependent upon agreed upon scope of services

Travel reimbursement is in addition to the Fee for all services being proposed.
Sangita,

Greetings.

I’d estimate travel expenses at no more than $1,200 and that’s probably a bit, but better safe than sorry. Please keep me posted.

Also, regarding your second email, replacing the workshop is fine. Please provide agenda for the day’s training when you have a moment.

Thanks.

Patrick Ibarra
The Mejorando Group
“Getting Better All The Time”
Sign up for Free quarterly e-newsletter, Moving Forward
www.gettingbetterallthetime.com
(925) 518-0187

Hi Patrick,

I hope you are well. I am in the final stages of putting together your contract. I have that the cost of the training will be $4,200 plus applicable travel expenses. The City Clerk requires that we have a full estimate of the cost. Please pull together the full cost estimate, including the travel expense (airfare, hotel, meals, etc.) and I will
PROPOSAL

January 10, 2019

CITY OF MENLO PARK

Employee Development and Training Services

Submitted By:

Patrick Ibarra
The Mejorando Group
7409 North 84th Avenue
Glendale, AZ 85305
925-518-0187

www.gettingbetterallthetime.com
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January 10, 2019

Lenka Diaz
Administrative Services Director
City of Menlo Park
701 Laurel Street
Menlo Park, CA 94025

Dear Lenka:

The Mejorando Group is pleased to offer our expertise to the City of Menlo Park Human Resources Department as a partner engaged to assist your efforts aimed at accelerating employee performance and organizational effectiveness through the creation of a Citywide Employee Development Training Program and Mini Conference Series.

Our qualifications are highly relevant in terms of performing your specific tasks and providing quality deliverables that will be extremely useful. We possess in-depth experience and expertise in designing and implementing leading-edge learning/training workshops for local governments nationwide. Our team has a clear understanding of the complexity of talent management and learning/training and development in a public-sector environment. Specifically, we have in-depth experience in the day-to-day operational needs and required competencies for mission-critical positions. We have created and assisted with the execution of formal Learning/Training and Development Programs for the cities of Beverly Hills (CA), Chandler (AZ), Coppell (TX), Edmond (OK), Hurst (TX), Pasadena (CA), Sunnyvale (CA) and Temecula (CA). The Mejorando Group considers Learning/Training Services to be a core competency of our overall consulting practice.

Offering consultation, facilitation, and training, since 2002 our firm provides organizational effectiveness services to client-partners that help achieve desired results. We take our name from the Spanish word, Mejorando, which means “Getting Better All the Time.” This reflects our commitment to our approach with clients who are seeking new ways to improve constantly.

As per the RFP, I will be the principal who will have direct and continued responsibility for the project and will interact directly with the City staff contact person.
Please contact me at 925-518-0187 or patrick@gettingbetterallday.com with any questions.

Sincerely,

Patrick Ibarra
Co-Founder and Partner
The Mejorando Group
1. SCOPE OF SERVICES

“We are going through a major revision to our employee compensation system and hired the Mejorando Group to help us provide tools to our leaders in navigating the change. One of the key components of our change management was a ‘Leaders Transforming Organizations’ training workshop, custom designed for us and presented by Patrick Ibarra. During three training sessions, Patrick provided our top leaders and managers with his ‘recipe’ for change management. Feedback from the evaluations was an appreciation for his relevant experience and knowledge of local government, his high energy, and his sequential approach to transformation. Participants are using Patrick’s techniques to articulate myriad changes that are currently underway to their groups. Patrick is the perfect person to infuse ideas, energy, and practical and applicable solutions into any organization that wants to innovate and stay ahead of local government trends.”

Eileen Gomez
City of Boulder, Colorado

A. MODERNIZING THE WORKPLACE AND WORKFORCE

Turbulence surrounds both today’s workforce and workplace, especially in local government. The workforce and workplace of tomorrow will be very different from those of today. Organizations need specific skills and attributes from their leaders, and for that matter, from members at all levels of the workforce. Employees will have markedly different needs and preferences, and workers will have different views based on their experiences, culture, ethnicity, and education. Workflows and work processes will change, and, for knowledge workers, the workplace is as likely to be remote as the office. Yet many organizational leaders continue to think and act as if today’s organizational structures, processes, hierarchies, and networks will have perpetual relevance – or at least don’t require modification any time soon.

Additionally, there are demographic shifts occurring, which are impacting the workforce and workplace:

- Each day, 10,000 people turn 65 years of age. According to the Pew Research Center, for the first time, millennials now outnumber baby boomers in the workplace 76 million to 75 million. Millennials comprise 1/3 of the current workforce at 53.5 million and by 2025 they will make-up 75% of the workforce.
- The millennial generation has different work motivations and expectations for greater work/life balance.
• The workforce will be more culturally and ethnically diverse and include more highly educated women, military veterans, and people with disabilities.

• Expectations are likely to increase for customized benefits, mobility of benefits, and flexible work options.

• The historical, long-term arrangement between employer and employee—sometimes referred to as “life-time employment” where the employer provides steady employment, attractive benefits, and wages in exchange for an employee’s long-term effort and tenure—is changing to one more akin to the private sector.

• The digital workplace and the rise in mobile technology are redefining the nature of work and the means of collaboration, and it is facilitating work in and from almost any location.

Organizations face a radically shifting context for the workforce, the workplace, and the world of work. These shifts have changed the rules for nearly every organizational people practice, from learning to management to the definition of work itself. As jobs and skills change, attracting and retaining the right people become more important than ever.

B. OUR EXPERTISE

Our firm has deep roots in the field of building a stronger workforce using integrated and unified Talent Management and Employee Development Training Programs. Since our inception in 2002, we have designed and implemented several talent management and employee learning and development programs for many public-sector organizations and Patrick Ibarra has been published extensively in these areas and spoken at scores of conferences advocating progressive and practical methods to effectively transition from the workforce you have to the workforce you need.

We have partnered with leaders from several local government organizations serving as the architect (designer) and contractor (implementer) of systematic and comprehensive Talent Management and Employee Development Training Programs:

• Collaborating with organizational leaders in crafting program objectives and components.
• Designing and delivering competency-based training workshops for all levels of the workforce – front line, supervisory, senior management and executives.
• Designed and presented periodic (i.e. mini-conference) sessions focused on optimizing emerging workforce trends.
• Providing specific improvements to recruitment, selection and promotional practices and processes.
• Designed and facilitated leadership development workshops for existing executive teams.
• Identifying critical/at-risk positions in both the short- and long-term.
• Designing program components including candidate selection process for Leadership, Management and Supervisory Development Programs.
• Facilitating the process to adopt competencies for front-line employees, mid-managers and executives.
• Administering 360-degree feedback assessment instruments of select employees.
• Aggregating 360-degree feedback from all program participants into overall performance assessment and providing series of recommendations focusing on training, development, performance management, organizational culture, and management practices.
• Designing and implementing Knowledge Transfer Programs.
• Providing performance coaching to a range of management and executive level employees.

C. OUR APPROACH TO LEARNING/TRAINING

Our “instructor-led, participant centered” approach to learning/training limits lecture and focuses on using a variety of instructional methods (e.g. discussions, video-clips, case studies, small group exercises, handouts to complete, skill-practices, and group discussions) to maximize the use of Adult Learning. Our goal is for participants to master the knowledge, skills and behaviors emphasized in the training program and to apply them to their day-to-day activities. We build in methods to transfer the training and new behaviors out into the workplace, using action planning, and examples and exercises from participants’ work/life. We firmly believe the combination of factors including training content, purpose of the training, the methods used, the material itself, the delivery mechanism, the facilitator, the participants, the environment and the evaluation, must be aligned and comprehensive for the training to be effective.

We seek to create and maintain interest in the topic, by encouraging question asking and by using a variety of instructional methods:

> Skills Practice/Role Play
> Case studies
> In-session written assignments
> Teachable point of view (tell me a story)
> Self-Assessments
> Small group discussions
> Partner exercises
> Video
> Mini-lecture
Our delivery methods maximize the use of effective learning principles and balance the needs created by a variety of participants learning styles. The goal is for participants to master the knowledge, skills and behaviors emphasized in the training program and to apply them to their day-to-day activities. We build in methods to transfer the training and new behaviors out into the workplace, using action planning, and examples and exercises from participants' work/life.

The materials will be custom designed, making it much easier for the participants to accept, learn, and implement. Because of our extensive experience in the public sector, we provide examples built into the training design and utilize strategies to ensure that the training "sticks."

The keys to our training being so effective are that we design it to:

- Maximize the similarity between the training situation and the job situation;
- Devote as much time and opportunity for skills practice as possible;
- Provide for a variety of examples when teaching concepts or skills;
- Make sure that general principles are understood before expecting too much transfer;
- Provide participants with the knowledge, skills and feelings of self-efficacy to self-regulate their own behavior/performance back on their jobs; and
- Design the training content so that the participants can see its applicability.

In addition to providing both fundamentals and advanced materials in the curriculum we develop, we also help participants translate their learning back into the workplace by providing them our guidance and insight into how best to optimize their capability.

D. PROPOSED SERVICES

"Patrick's workshop was the best workshop I have ever been to, hands down! Love his enthusiasm and he really motivated me to start some new things in our organization!"

- James, workshop participant

The City of Menlo park must operate in a legacy world, meaning that you must be able to keep doing the nuts-and-bolts work at the core of the mission. But you also must be ready to succeed in a fast-changing environment, one that's difficult to predict.

Identifying, selecting, preparing and supporting long-term success for managers and leaders of any generation is challenging. Managers and leaders must succeed, and
they must grow into the kind of managers and leaders the City will need in the future – near term, short term and long term – even when the future is riddled with uncertainty.

The following table illustrates the changing role of managers.

<table>
<thead>
<tr>
<th>Role Changes for Managers</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Past</strong></td>
</tr>
<tr>
<td>Manage – Oversees the organization’s use of human resources.</td>
</tr>
<tr>
<td>Control – Uses power and authority to reach desired outcomes.</td>
</tr>
<tr>
<td>Direct – Instructs others on action to take.</td>
</tr>
<tr>
<td>Risk Avoidance – Is reluctant of consequences for making decisions or taking actions outside of the “norm.”</td>
</tr>
<tr>
<td>Individual – Seeks individual credit.</td>
</tr>
<tr>
<td>Information Owned – Believes knowledge is power.</td>
</tr>
<tr>
<td>Delegate – Assigns duties and tasks.</td>
</tr>
<tr>
<td><strong>Present</strong></td>
</tr>
<tr>
<td>Lead – Acts as role model; guides employees to reach the organization’s goals.</td>
</tr>
<tr>
<td>Influence – Uses negotiation and influencing strategies to reach acceptable outcomes for all.</td>
</tr>
<tr>
<td>Facilitate – Gathers input and ideas from others involved on approach to take.</td>
</tr>
<tr>
<td>Risk Management – Weighs consequences with benefits and makes informed decisions.</td>
</tr>
<tr>
<td>Team – Encourages all members to work toward the same goal.</td>
</tr>
<tr>
<td>Information Shared – Believes the more employees know, the better able they are to produce positive results for the organization.</td>
</tr>
<tr>
<td>Empower – Fosters an environment where employees make decisions and take accountability.</td>
</tr>
</tbody>
</table>

In this proposal, we share our experience and expertise in a demonstration of why the Mejorando Group is the firm most qualified to help implement the City of Menlo Park’s Employee Development Training Program. Our approach will be comprehensive and holistic to ensure the Program is strategically aligned with organizational processes and employee capabilities. Our recommendations are designed to disrupt the status quo and enable the organization to adopt and implement a comprehensive and systematic approach to building a more capable workforce.
Services being proposed include:

Conduct not a Training Needs Assessment, but instead a Rapid Results Performance Needs Assessment (PNA) by taking the following steps:

a) Conduct a series of meetings to obtain input about skills/competency areas on which the Program should focus. These meetings shall include:
   - Interim City Manager and Assistant City Manager
   - Department Directors
   - Group of employees considered high-performers from across the organization

b) Review a variety of materials to gain insight into the City of Menlo Park and its past experience with learning and development:
Feedback and Results of past learning and development initiatives targeted at equipping workforce members.

City performance reports

Performance Appraisal instrument (blank)

Others To Be Determined

c) Prepare written summary documenting Rapid Results PNA and review with the Human Resources Director to final form.

d) Present report and facilitate meeting with members of the Executive Leadership Team (i.e. City Manager and Department Directors) and Human Resources Department staff responsible for organizational development and employee training to discuss the recommended Learning and Development Program (LOP). In particular, to review the curriculum in the program, discuss the role department directors play to ensure a successful LDP and respond to any questions raised. The intent is to ensure the group is unified moving forward.

**Delivering Training for front-line, Middle Manager and Supervisors**

While the PNA has not been completed, based on our experience and expertise in similar situations with other municipalities a series of training/learning workshops is being proposed. The topics are subject to revision and based on the PNA. In lieu of completing a PNA, the topics for training will be based on discussions between the Mejorando Group and appropriate City staff. All our training/learning workshops are four (4) hours in length, which tends to work well with the demands placed on employees, allowing them the balance of the day to attend to job/role-related matters. Depending upon the City's preference, two groups may be launched with one group attending training in morning for a workshop and a second group attends in afternoon. Several of the suggested topics for the workshops being proposed are also identified in the City's RFP

**Program for Emerging/Beginning Leaders**

1) Art of Delegation
2) Building Great Work Teams
3) Coaching
4) Managing Employee Performance
5) Positive Motivation
6) Providing Effective Feedback
7) Time Management
8) Voice: You've Been Promoted

**Program for Intermediate Leaders**

1) Building Great Work Teams
2) Coaching
3) Developing Others
4) Facilitating a Service Culture
5) Hire for Fit
6) Leading Change
7) Managing Employee Performance
8) RAPID Innovation
9) Succession Planning

Program for Advanced Leaders

1) Facilitating a Service Culture
2) Hire for Fit
3) Leading Change
4) Managing Employee Performance
5) Politics 2.0
6) Presentation Skills
7) Succession Planning
8) Supporting Employee Development
9) Your Leadership Playbook

A course description and learning objectives for each of these workshops and our entire catalogue begins on page 27 of this proposal.

Executive Team Development

The proposed project approach benefits City leaders through achievement of the following objectives:

Objectives for the Organization

- Strengthened organizational leadership (i.e. stronger and more qualified internal bench of potential “successors”)
- Increased organizational productivity and effectiveness
- Strengthened communication among leaders and between managers and direct reports (i.e. subordinates)

Objectives for members of the Executive Team

- Increased level of self-awareness about strengths and areas for improvement that are crucial to current and future success
- Improved effectiveness and productivity
- Diversified work assignments
- Updated skills and knowledge
Our work with other public-sector clients reinforces our strong belief that throughout the proposed Executive Team Development Program, continuing emphasis should be placed in the following areas:

- Systems thinking
- Managing in a complex political environment
- Collegial collaboration
- Awareness of personal impact and interpersonal effectiveness
- Working with a diverse workforce

The Executive Team Development Program will be composed of the following components:

- A full-day Advance (as opposed to a retreat) session involving all members of the leadership team. At this time, while the actual agenda for the meeting has not been drafted, the following is a general outline as used in similar situations.

  - View brief film clip from Ken Burns documentary on “Lewis and Clark” to explore applicability to the Executive Leadership Team.
  
  - “Change as a Process, not an Event” – Explore the various trends impacting the role of government, the City in general, and discuss ways to translate the headwinds of change into a tailwind.
  
  - “The Leadership Equation” – An examination of the three components which comprise the Leadership Equation: Credibility, Believability and Trust.
  
  - “Ingredients for a Successful Service Organization and How Are We Doing?” In this exercise, eight ingredients which comprise a Successful Service Organization will be shared, and a discussion will ensue about how well the organization is performing against that criteria.
  
  - “Profile of Success” – Identify and discuss the factors which are essential to an employee achieving success.
  
  - Six Ways Organizational Culture affects Employee Motivation” – Participants discuss the three motives which increase employee performance and the three which reduce it and explore how these apply to the City’s workplace culture.

Patrick will facilitate the meeting by utilizing an approach that encourages the full participation of attendees, creates a relaxed and productive meeting environment, and keeps the group on-track with accomplishing agreed upon objectives.
Discussions would be held with the Interim City Manager and Assistant City Manager about specific areas to be focused on during the Advance session. Based on that discussion, an agenda will be prepared for review.

- Executive Coaching services (if desired)
- Bi-monthly (every other month) leadership training/learning workshops half-day in length. Specific topics will be determined at a later date.

Every activity will have two fundamental purposes:

a) Increase knowledge, skills and/or abilities relevant to the leadership attributes
b) Help participants work on their goals in their personal development plans

An option to consider that establishes a baseline for each member of the executive team is to administer a 360-degree assessment. Assessment is important because it will provide employees an understanding of where they are now: what are their current strengths, the level of their current performance or leadership effectiveness, and what are primary development needs. In the context of their everyday work, people may not be aware of the degree to which their usual behaviors or actions are effective; in the face of a new challenge, they may not know what to continue doing and what to change. Even if they do realize that what they are doing is ineffective, people may believe the answer is to just work harder; it may not occur to them to try a new strategy. But when a program provides feedback on how they are doing and how they might improve or provides other means for critical self-reflection then people are more likely to understand their situation and to capitalize on a learning opportunity.

One important function of assessment data is that it will provide a benchmark for future development. Another is that it will stimulate people to evaluate themselves:

- What am I doing well?
- Where do I need to improve?
- What are others’ views of me?
- How do my behaviors impact others?
- How am I doing relative to my goals?
- What’s important to me?

Good assessment data also help people clarify what needs to be learned, improved, or changed. Having data not only motivates a person to closes the gaps but provides clues to how those gaps might be closed. These are included in the creation of the individual employees' training and development plan.

Patrick Ibarra is certified by the Center for Creative Leadership in their entire suite of 360-degree assessment processes and facilitates feedback sessions with participants after the completion of the assessment in order to create a customized learning and
development plan. Also, an aggregate report of the entire group’s 360-degree assessment results can be generated and utilized as input into the executive development program.

**Providing One-on-One Executive Director Coaching Services**

Essential to my coaching philosophy is the belief in my role as the equivalent of a Fitness Trainer with those whom I establish a coaching/partner collaboration. Similar to getting in physical shape, the fitness trainer is responsible for co-creating with the person a results-based fitness plan that enables the person to achieve their desired goals. The trainer then serves as a facilitator and coach providing guidance, support, and technical expertise to assist the person, so progress is achieved, and goals accomplished in a timely manner.

In this instance (and will be customized based on the individual being coached), the components of “getting in shape” may be defined as improving his/her:

- Relationship Building
- Political Acumen
- Leadership Capabilities
- Management Skills
- Decision Making
- Supervisory Abilities,
- Individual Performance and
- Work group’s effectiveness

In providing coaching services, I operate using a 3C framework: 1) Clarity of purpose; 2) Commitment to improvement and 3) Confidence which is essential to making significant change. I believe I am effective at helping individuals dramatically improve their ability to make effective decisions, rekindle their passion, focus their efforts and energy towards desired results, and strengthen relationships. In addition, I offer individuals the benefit of his extensive experience in local government and counsel on how best to optimize their performance in such an environment.

**Coaching services will consist of the following activities:**

1. Initial in-depth meeting with the participant and his/her manager to specifically identify which areas he believes need the most attention. (approximately 1 hour in length)

2. Provide Leadership Development Coaching (number of sessions is dependent upon need and budget). Sessions may address the following issues: effective communication and conflict resolution; and leadership as a mentor, coach and role model for professional workplace performance. Each session is approximately 1 hour in length.
3. Provide a wrap-up debriefing session with the manager of the participant of approximately 1 hour in length. This session will review progress to date and discuss new issues and/or recommendations surfaced during the coaching session with the primary emphasis to identify next steps on action items.

Mini-Conferences

The City is interested in holding a “Mini Conference Series” as a means to increase employee engagement and provide employees a development opportunity. We have designed and presented material in similar formats for the cities of Glendale (CA), North Richland Hills (TX) and Rancho Cucamonga (CA). Topics that have been included for those cities are: Taking Initiative In Your Own Role, Facilitating a Service Culture, The Next Generation, “We’ve Always Done It That Way Is Over: Transforming from the Status Quo to the Status Go,” to name a few. Typically, these are presented in a combination (conference) presentation and training format. Upon further discussions with appropriate City staff, the precise topics can be identified for these sessions.
### 2. EXHIBIT B. PRICING FORM

<table>
<thead>
<tr>
<th>Description/Component</th>
<th>Unit</th>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completion of Rapid Results Performance Needs Assessment documented in a Written Report</td>
<td></td>
<td></td>
<td>$11,000</td>
</tr>
<tr>
<td>Delivery of two ½ day workshops – factoring in one in morning and second in afternoon, regardless of topic. The grand total depends upon the number of training workshops selects.</td>
<td></td>
<td></td>
<td>$4,200 – full day</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$2,900 – ½ day</td>
</tr>
<tr>
<td>Provision of Coaching Services</td>
<td></td>
<td></td>
<td>$275 hourly</td>
</tr>
<tr>
<td>Fee for Facilitation of full-day Executive Team Retreat/Advance session</td>
<td></td>
<td></td>
<td>$4,500</td>
</tr>
<tr>
<td>Administer 360-degree assessment services</td>
<td></td>
<td></td>
<td>Dependent upon number of participants</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sales Tax</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Total</td>
<td>Dependent upon agreed upon scope of services</td>
</tr>
</tbody>
</table>

Travel reimbursement is in addition to the Fee for all services being proposed.
3. QUALIFICATIONS

Founded in 2002, the Mejorando Group, a Hispanic owned and certified Minority Business Enterprise (MBE), is a consulting practice focused on improving the management and operation of government organizations. Offering consultation, facilitation, and training the Mejorando Group values building and sustaining customer relationships by helping align your most important resource – your people – so that your organization moves faster and more successfully toward accomplishing your goal of high-quality public service. We take our name from the Spanish word, Mejorando, which translated means “Getting Better All The Time.” This reflects our commitment to our approach with clients who are seeking new ways to improve constantly.

Based in Glendale, Arizona the Mejorando Group is a sole proprietor business structure, augmented with a solid group of professionals that have served as executives and managers in organizations from both the public and private sector, and together have several years of experience working in all aspects of local government management. This arrangement generates multiple dividends, including the application of extensive subject-matter experts and seasoned organizational development practitioners combined with the vast experience and expertise of former local government executives. Together, we help to effectively disrupt the status quo and bring leading-edge solutions to improve employee performance and organizational effectiveness.

Against a backdrop of changing mission requirements, shifting workforce demographics and increased public expectations of what the government can deliver, local governments are striving to attain the next level of performance – incorporating mission changes while they implement new technologies, equip an emerging workforce, adapt operating practices, and maintain stable budgets and respond to fluctuating budgets. These multiple challenges are having a profound effect on the resources public sector agencies require, creating a need for organizations to adjust the size and mix of their workforce, leverage alternate workforce resources, and strengthen workforce capabilities.

We feature a proven record of partnering with organizations through the myriad of issues influencing individual performance, group/team interactions, and overall
organizational effectiveness. Our “hands-on” approach and ability to collaborate with all levels, from field personnel to executive management, enable us to integrate strategy, structure, process, quality, and culture to the desired end: optimal performance.

Our full range of services includes the following:

- **Talent Management Programs and Services:**

  - **Succession Planning Programs** – We are one of the country’s leading experts in effectively addressing the impacts from the changing workforce and designing succession planning programs. We design and implement all aspects of a robust Succession Planning Program which focuses on establishing job-level Competencies and recommending targeted improvements to Recruitment, Selection, Leadership Development, Workforce Learning/Training, and Promotional processes – in which all are synchronized towards equipping an agency’s workforce with the skills and capabilities to maintain high-quality service delivery and effective local government.

  - **Learning/Training – Design and Delivery** - We develop learning/training strategies, design workshops, deliver and evaluate training, and provide coaching to executives and managers. Our “instructor-led, participant centered” approach to training limits lecture and focuses on using a variety of instructional methods (e.g. discussions, video-clips, case studies, small group exercises, handouts to complete, skill-practices, and group discussions) to maximize the use of Adult Learning. Our goal is for participants to master the knowledge, skills and behaviors emphasized in the training program and apply them to their day-to-day activities. We feature over forty (40) competency-based training workshops for workforce members from all areas of your organization, front-line to executives.

  - **Leadership and Management Academy(ies)** – We design and implement Leadership and Management Academies including assisting with candidate selection processes, curriculum development, training delivery including an on-line/web-based component, and facilitation of action learning teams.

  - **Coaching** – We provide coaching services to middle and senior level managers and seasoned executives designed to improve individual performance and organizational effectiveness. We are certified in
Performance Assessment (i.e. 360-degree feedback processes) from the Center for Creative Leadership.

- **Mentoring Programs** – We design and implement award-winning Mentoring Programs that reflect an organization's culture and match leaders as mentors with those employees interested in accelerating their performance and career trajectory.

- **Knowledge Transfer** – We provide leading edge practices enabling organizations to effectively transfer high value tacit knowledge essential for business continuity. Knowledge Transfer is a rapidly growing occurrence within forward-thinking organizations concerned about the mitigating the impacts of the departure of seasoned employees.

- **Organizational Analysis and Process Improvement** – We review and analyze various functional areas within an organization or agency to help discover more effective ways to manage and perform management and organizational activities. The Mejorando Group helps organizations succeed in their efforts to excel by utilizing a results-oriented approach that assesses the current effectiveness of existing strategies, structures, programs, work processes, and measurement systems. Strategies and tactics are provided to disrupt the status quo, and breakthrough practical solutions are implemented to align the organization's people and work processes toward high performance.

- **Facilitation** – Our approach to facilitation, from team building to strategic planning, enables a group to focus on future business conditions and generate progressive strategies and innovative tactics to effectively anticipate and respond to those often-changing circumstances. This results in a proactive and dynamic approach to sustaining a high-quality, high-performance organization. We are certified in Facilitation Skills from Development Dimensions International (DDI).

- **Change Management** - Managing change is the most important aspect of any effort to improve employee performance and organizational effectiveness. We view change management as a process and help to guide implementation of change initiatives by utilizing and engendering in others the methods, tools, and expertise which focus on both the human and organizational aspects of the change. We provide a series of sequenced actions that will effectively disrupt the status quo and implement sustainable change.

Beyond our website which provides general information on our firm, services we provide, list of clients, and resources such as articles we have authored, we are extremely active in social media, providing relevant and timely content to those persons who are vigilant about “getting better all the time.” Please visit our sites on Facebook and Twitter for the latest solutions to the most pressing challenges confronting government leaders. Finally, each quarter we author a quarterly e-newsletter, “Moving
Forward" distributed to over 4,000 public sector professionals providing a path forward through the turbulent times impacting government.

4. REPRESENTATIVE EXPERIENCE

"I'm fairly new at managing staff and was somewhat intimidated by my colleagues who had more experience. Patrick Ibarra's training workshops as part of the Leadership Academy helped me identify my strengths and areas for improvement and gave me the time and place to practice important skills. I now feel extremely comfortable using the techniques Patrick taught me, and I look forward to getting better all the time!"

Sheila Childers  
City of Chandler, Arizona

The following clients' success stories will demonstrate our extensive experience and in-depth expertise in the design and delivery of training/learning program and workshops.

Central Contra Costa Sanitary District (Martinez, California)

Recently completed delivering a series of eight competency-based training workshops to a group of twenty employees who are either presently a supervisor or interested in being promoted into a supervisory role. Workshops include: Transitioning to a Supervisory Role, Building Teams, Providing Feedback, Delegation, Resolving Conflict and Labor Relations.

City of Edmond, Oklahoma

In July of 2018, finished delivering a series of eight competency-based training workshops to a group of thirty employees organized in a cohort format, who expressed an interest in being promoted into a supervisory role. Workshops included: Transitioning, Building Teams, Providing Feedback, Managing Employee Performance, and Coaching and Counseling. Reference: Lisa Goodpasture, Human Resources Director, 405.359.4687 Lisa.Goodpasture@edmondok.com

City of Chandler, Arizona

The City of Chandler obtained consulting services from the Mejorando Group to assist with implementation of a City-wide Succession Planning Program. Services included creating performance leadership competencies through the facilitation of employee work
groups and designing and presenting/facilitating a Pilot Leadership Development Program including the administration of a 360-degree feedback process for participants and delivery of six competency-based learning/training workshops: Transitioning into Management, Art of Delegation, Managing Employee Performance, Leading Change, Politics 2.0 and RAPID Innovation. Three groups of employees completed training via a cohort format. Debra Stapleton, Administrative Services Director, (480) 782-2350, Debra.Stapleton@chandleraz.gov

City of Hurst, Texas

Designed and delivered a Management Development Program including the design and delivery of supervisory and management level training workshops: Transitioning into Management, Art of Delegation, Facilitating a Service Culture, Managing Employee Performance, Leading Change, Politics 2.0 and RAPID Innovation. Matia Messemer, Executive Director of Human Resources, MMessemer@hursttx.gov, (817) 788-7013.

City of Coppell, Texas

Designed and delivered a Management Development Program including the design and delivery of supervisory and management level training workshops: Transitioning into Management, Art of Delegation, Facilitating a Service Culture, Managing Employee Performance, Leading Change, Politics 2.0 and RAPID Innovation. Delivered training each Fall since 2015 to different groups of employees who attend via a cohort format. Justin Vaughn, Assistant Director of Administration/Human Resources, 972-304-3611, jvaughn@Coppelltx.gov

City of San Bruno, California

Developed and implemented a Leadership Development Program that included establishing the candidate/participant selection process, the design and delivery of competency-based training workshops and facilitation of action learning project teams. List of competency-based training workshops included: Art of Delegation, Creative Problem Solving, Facilitating Change, Innovation, Motivating Employees, Performance Management, and Taking Initiative: How to be more of a Leader, and Transitioning to Supervision. An on-line component was also included in this Leadership Development Academy that involved participants accessing content via the Mejorando Group’s website and engaging in several threaded discussions about workshop related topics.

City of Goodyear, Arizona

Designed and implemented a Management Development Program including candidate selection process, creation of job-related competencies, and the design and delivery of supervisory and management level training workshops. List of competency-based training workshops included: Building Effective Work Teams, Communication, Decision Making, Performance Management, Problem Solving and Transitioning to Leadership.
5. PROJECT TEAM RESUME/PROFILE

PATRICK IBARRA
Co-Founder and Partner, The Mejorando Group

As co-founder and partner, Patrick Ibarra is responsible for Strategic Planning Processes and Facilitation Talent Management (i.e. Workforce and Succession Planning), and Organizational Effectiveness services. As a Consultant and Manager in both public and private sector organizations, including as a city manager and human resource director, Mr. Ibarra brings organizations over 33 years of experience and a shared understanding of the demands and constraints placed on organizations and their employees.

Patrick has designed and facilitated hundreds of customized organization development efforts specifically for cities and counties designed to transition and sometimes transform from the prevailing to the preferred culture. He has extensive depth and breadth of subject matter expertise in the many facets of organization development assessment tools (interviews, focus groups, surveys, 360-degree feedback instruments, etc.) and intervention strategies (culture change, strategic planning and execution, teambuilding/group development, etc.).

A Speaker, Author and Conference Presenter, Mr. Ibarra also serves on the adjunct faculty staff at Arizona State University. He teaches courses on organizational change.

Employment History

- The Mejorando Group Consulting Practice, Co-Founder and Partner
- City of Port Angeles, Washington City Manager
- City of Mason, Ohio Assistant City Manager/Human Resource Director
- City of Emporia, Kansas, Management Assistant, Office of the City Manager
- City of Phoenix, Arizona, Management Assistant, Public Works Department

Education
• Master of Human Resources and Organization Development, University of San Francisco
• Master of Public Administration, Arizona State University
• Bachelor of Science degree, Political Science, Central Missouri State University
• Graduate of the University of Virginia Senior Executive Institute for Public Service
• Certified to administer Assessment and Performance Support tools, Center for Creative Leadership
• Certified Facilitator, Development Dimensions International

Publications

• “Career Track: Must Reads for Leaders – Part 2” December 2018 issue of Public Management by ICMA
• “Career Track: Must Reads for Leaders - Part 1” September 2018 issue of Public Management by ICMA
• “Team Builders: New Approaches to Creating the Next Government Workforce” July/August 2018 edition of City Voice published by the Association of Washington Cities
• “Career Track: Quality Government” June 2018 issue of Public Management by ICMA
• “Career Track: The Recipe for Success” March 2018 issue of Public Management by ICMA
• “The Future of Leadership Has Arrived” February 2018 issue of Texas Town and City published by the Texas Municipal League
• “Career Track: Crafting a Healthy Workplace Culture” November 2017 issue of Public Management published by ICMA
• “Career Track: The Changing Workplace” June 2017 issue of Public Management published by ICMA
• “Curating a Healthy Workplace Culture” June 13, 2017 issue of Governing.com
• “Career Track: Make CLEAR Your Path?” March 2017 issue of Public Management published by ICMA
• “17 Local Government Predictions for a Successful 2017” published by ICMA
• “Building a 21st Century Workforce” December 2016 issue of CSMFO Magazine published by the California Society of Municipal Finance Officers
• “Career Track: Cultivating Creative Leadership” December 2016 issue of Public Management published by ICMA
• “Six Ways to Engineer Public-Employee Engagement” November 29, 2016 issue of Governing.com
• “Career Track: Mission Critical Mentoring” September 2016 issue of Public Management published by ICMA
• “Building Governments Employer Value” August 16, 2016 Issue of Governing.com
• “Career Track: How Fit are you to Advance?” June 2016 issue of Public Management published by ICMA
• “Getting More Value out of the Government HR Department” May 11, 2016 issue of Governing.com
- "Career Track: Talent Management" March 2016 issue of Public Management published by ICMA
- "Next Generation Professionals: An Inside Look at What Matters to Them" August 2015 issue of Public Management published by ICMA
- "Retaining A+ Performers in the Finance Department" February 2015 issue of Government Finance Review published by the Government Finance Officers Association
- "What Government can learn from the Culture of Apple" January 20, 2015 issue of Governing.com
- "Turning Your Organization into a Talent Magnet" February 2014 issue of Government Finance Review published by the Government Finance Officers Association
- "Government’s Crucial Employer Brand" December 11, 2013 issue of Governing.com
- "What is Successful Government" September 25, 2013 issue of Governing.com
- "The Next Government Workforce" October 24, 2012 issue of Governing.com
- "Talent Management: The Next Phase of Succession Planning" September 2012 issue of IPMA-HR News published by the International Public Management Association for Human Resources (IPMA-HR)

**Conference Presentations - 2018**

- Association of Washington Cities
- **California Contract Cities Association**
- Colorado City/County Management Association
- Government Finance Officers Association – Illinois Chapter
- Government Finance Officers Association – Utah Chapter
- International City/County Management Association
- **League of California Cities Annual Conference**
- **League of California Cities – Public Works Officers Institute**
- League of Oregon Cities Annual Conference
- **Los Angeles County Fire Chiefs Association**
- Missouri Municipal League Annual Conference
- Municipal Association of South Carolina Annual Conference
- New Mexico City Manager’s Association
- Texas Municipal Human Resource Association
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- WAPELRA
- Wisconsin Municipal Clerks Association

Conference Presentations - 2019

- Arizona City/County Management Association
- International Public Management Association – Human Resources Western Region
- League of California Cities – Public Works Officers Institute
- South Carolina City Management Association
# 6. Catalogue of Training Workshops

1. **The Art of Delegation**
2. Building Great Work Teams
3. Coaching and Counseling
4. Communicating in Teams
5. **Creative Problem Solving**
6. Excellence in Customer Services
7. Facilitating a Service Culture
8. Facilitating Groups and Teams Effectively
10. Leadership in the Performance Review: A Catalyst for Employee Growth
11. **Leading Change isn't a Spectator Sport**
12. Manager-Led Team Building: Developing Teams with Vision
13. Managing Priorities through Time Management
14. Manager's Role in Succession Planning
15. New Manager/New Supervisor
16. Optimize Performance: My Role as a Leader
17. People Management: The Fundamentals
18. Performance Management
19. Positive Motivation equals Positive Performance
20. Presentation Skills
21. Project Management
22. Providing Effective Feedback
23. R.A.P.I.D. Innovation: Converting Ideas into Results
24. Strategic Planning for Action-Oriented People
25. Supporting Employee Development
26. **Taking Initiative: How to Be a Leader in Your Own Role**
27. What If We Tried It This Way? - Creative Problem Solving
28. Your Leadership Playbook

## 1. The Art of Delegation: Effectively Guiding Direct Reports

Managing has been defined as getting others to do what needs to be done. In delegations that have gone wrong, the delegator usually has omitted one or two critical steps. This module is intended for front-line supervisors and managers who have had experience
delegating assignments or responsibilities to their direct reports. Participants will assess their attitudes and current practices as delegators, and through experiential activities, explore how to delegate effectively.

Learning objectives:

- Self-assess as delegators of responsibility
- Describe the Trust-Delegation Matrix
- Utilize the Six Steps of delegation
- Identify and assign tasks appropriate for delegation
- Augment their strengths and begin working on areas for improvement as a delegator
- Utilize eight important ingredients of effective delegation
- Complete a delegation plan to guide them in the delegation of specific tasks

2. Building Great Work Teams

Work teams inside organizations operate at various levels of effectiveness. Participants at this workshop will immediately enhance their team leadership skills by learning the five keys to building great work teams; techniques to resolve conflict; exercises available to fortify team bonding; beneficial team behaviors; ingredients to start up new teams; and tools necessary to get work done in teams.

Learning objectives:

- Start up new teams
- Appreciate and respect individuals on the team and their collective role
- Recognize the value of team building as a method to coalesce team members
- Strengthen team performance through the application of communication and conflict management styles
- Recognize and encourage beneficial team behaviors among team members
- Utilize strategies for building group consensus

3. Coaching and Counseling

This program is designed to increase a manager's skills as a coach and as a counselor. A coaching relationship is indicated when the employee is open to advice and shows little defensiveness. As a counselor, a manager identifies a problem that interferes with an employee's work performance. A manager needs to switch from coaching to counseling mode when employees are less open to the manager's input. Participants are asked to examine their own beliefs about coaching and counseling, to practice key skills, and to acquire a basic understanding of when and why those skills are necessary.
Learning objectives:

- Identify the value of coaching and counseling in a manager's work
- Recognize and use a coaching matrix
- Determine when to coach and when to counsel
- Recognize how personalities affect coaching/counseling roles
- Develop basic competence in applying coaching and counseling skills

4. Communicating in Teams

The use of teams has increased dramatically in organizations over the last several years. A key ingredient to the team accomplishing its goals is effective communication between members. When teams work well together, ideas flow freely among members and conflicts are surfaced and managed. The goal of this program is to help participants develop their capacity to communicate in a team setting and to develop skills in solving team communication problems.

Learning objectives:

- Increase the match between what people intend to communicate and what their team members perceive
- Learn techniques for giving and receiving feedback
- Uncover important but unspoken issues in a team
- Develop the ability to communicate clearly and directly with different team members

5. Creative Problem Solving

Often, we're limited by the "we've always done it that way" approach. Solving problems in a creative manner can be the key to a more productive and satisfactory work life for employees. Creative problem solving is as much an art form as it is a scientific process. It requires creativity, intuition, and imagination. This program is designed to enable participants to learn and apply concepts and techniques related to an integrated approach to creative problem solving.

Learning objectives:

- Understand problems in new ways
- Create a target for problem-solving efforts
- Acquire skills in developing novel solutions
- Become aware of how groups foster creative problem solving
- Develop an effective action plan for implementing creative solutions
6. Excellence In Customer Service

Excellent service is the key to remaining credible with customers. Good service is the result of focused and intense management attention to a few basic principles, and the strategic and tactical implementation of these principles throughout the organization. This program is intended to build an appreciation of the value of customer service and an awareness of the behaviors that attract and repel customers, to provide practice utilizing effective service behaviors, to give participants the opportunity to assess the organization's current customer readiness, and to introduce participants to the barriers and opportunities of developing an excellent service profile within departments. It addresses the principles involved in attaining an excellent service profile and examines how to implement those principles. Leaders, managers, and front-line employees alike will benefit from the experiences provided.

Learning objectives:

- Understand the impacts of service on the organization's credibility with customers
- Examine poor and positive customer service practices
- Determine how to assess the customer's perspectives of service
- Assess the organization's customer-service climate
- Identify the key organizational dynamics underlying good or poor service
- Learn and practice effective customer-service behaviors
- Acquire new ways of creating a real commitment to good service and improving real and perceived service
- Develop personal and organizational customer-service improvement plans

7. Facilitating a Service Culture

Government organizations are in the business of public service. Providing high-quality service is essential to generating credibility with the community-at-large. The level of importance placed on delivering high-quality service is influenced by the organizational culture. When it comes to culture creation and embedding, the behavior of an organization's leaders is extraordinarily influential. "Walking the talk" has special significance in that employees pay far more attention to the walk than the talk. Especially important is what the leaders attend to, measure, become upset about, reward, and punish. In this workshop, leaders learn about the aspects of a customer-centric organization and how to increase their influence on aligning their culture with that of an entrepreneurial approach to service. In entrepreneurial cultures, employees assume that they should improve the organization's efficiency and results, think about and change the way things are done, work together on solving problems and coming up with innovations, and respond flexibly and quickly to feedback from customers.

Learning objectives
• The role culture plays in driving employee and organizational performance
• Elements of a customer-centric strategy
• Aspects of an entrepreneurial public-sector organization and operation
• Techniques and tools available to align the culture with the organization’s mission, vision and values and that of an entrepreneurial culture

8. Facilitating Groups and Teams Effectively

Facilitating is a way of providing leadership without taking the reins. As a facilitator, your role is to get others to assume responsibility and to take the lead. An effective facilitator functions as a catalyst, a coordinator and a coach. Join us and you’ll immediately enhance your facilitation skills by learning the seven facilitation stages, methods to create active participation, the core practices of effective facilitation, and the importance of differentiating between process and content.

Learning objectives

• Recite the ways in which facilitators contribute
• Manage Structure, Not Content
• Identify Core Practices of effective facilitation
• Recite the Seven Stages of facilitation
• Encourage Participation through Questions and Listening Skills
• Techniques to resolve conflict
• Apply six decision-making options


More efficient, more effective, better, faster, smarter. Organizations often hear this about the services, projects, and programs they provide. The ability to improve work processes can dramatically alter an organization’s performance. This module is designed to enable participants to learn and apply concepts and techniques related to process improvement.

Learning objectives:

• Recognize the basic components of processes
• Identify processes in the work environment for improvement
• Locate specific areas of variance and non-value
• Utilize the techniques of process mapping for current and future processes

10. Leadership in the Performance Review

The core of any organization is people working together. The more involved and
worthwhile people feel, the greater the potential for organizational excellence! The
performance appraisal presents an important opportunity to involve people in planning
their future growth. The goal of this module is to demonstrate and practice guidelines for
effective written and verbal communication to be used during a review. Participants learn
how to act as catalysts for their employees’ personal and professional growth. Practice of
written documentation, active listening, constructive feedback, and goal-setting skills
takes place during the module.

**Learning objectives:**

- Recognize the importance of the employee performance review as a leadership
  opportunity
- Define and practice giving constructive feedback and using active listening skills
- Develop clear, written evaluations
- Utilize the steps to co-create an individual development plan that increases
  involvement and motivation

### 11. Leading Change isn’t a Spectator Sport

According to research, after implementing a major change initiative about 30 percent of
any group will be resistant to change; about 20 percent will readily move toward the new
direction; and 50 percent will adopt a wait-and-see attitude. Effective change initiatives
occur when there’s alignment between an organization and its building blocks, such as
people, culture, tasks, organizational structure, and work processes. This program
provides managers and supervisors with tools and techniques to help them successfully
navigate the turbulent and often uncertain path of change.

**Learning objectives:**

- Identify internal and external forces imposing change
- Define roles and responsibilities in managing change
- Develop strategies for coping with and managing change
- Identify ways to involve employees in the change process
- Use a model to introduce change to employees

### 12. Manager-Led Team Building: Developing Teams With
Vision

This module is designed for a manager or supervisor and his or her team. Two central
considerations underlie team building: 1) people must have a common purpose or
objective in order to coordinate their actions continuously. This purpose includes
understanding the relevance of the team’s work to the larger organization; 2) healthy and
effective teams reaffirm all team members as caring, respected individuals who matter
and make contributions to others.
Learning objectives:

- Recognize a shared vision of the team's work
- Recognize how team members must conduct themselves in coordinating with others
- Understand the team's work in achieving its vision

13. Managing Priorities through Time Management

Time management is a process of constantly setting and arranging priorities. When we struggle to manage our time, our ability to complete assignments on schedule can be made more difficult. Between the influx of meetings, voice-mail, and e-mail, the ability to manage our time effectively can be an arduous process. Yet it feels totally different when we're using time in a way we choose for ourselves than it feels when our time seems to loom out of control. A strong motivation to use one's time to accomplish what one truly wants is necessary to bring about behavioral changes. This program is for anyone who wants more out of life, at work and at home.

Learning objectives:

- Increase awareness of attitudes toward time
- Understand the seven competency areas associated with Time Management Effectiveness
- Identify individual tendencies in each of the seven competency areas
- Begin working on improving those areas identified for each competency where opportunity exists
- Recognize procrastination habits and techniques to overcome them
- Prepare a comprehensive and effective To-Do List to guide daily work
- Assess priorities and categorize to either Dump, Do, Delay, or Delegate
- Utilize techniques on managing interruptions
- Learn to plan time by setting priorities and developing action plans

14. Managers Role in Succession Planning

Many organizations are facing the retirement of a significant number of their workforce. Succession planning ensures that replacements have been prepared to fill key vacancies on short notice, that individuals have the development to assume greater responsibilities, and that individuals are prepared for exercising increased technical proficiency in their work. Without succession planning, an organization may operate in a crisis mode whenever key workers are unexpectedly absent from critical positions due to illness, retirement, resignation, or termination.

Learning objectives:

- Identify the manager's role in succession planning.
- Identify and analyze critical positions requiring backups on a temporary or
permanent basis.

- Compare individual appraisals of past and present performance with assessments of future individual potential.
- Utilize a variety of methods to prepare high-potential employees for advancement by narrowing the developmental gaps between present performance and future potential.

### 15. Voila - New Manager/New Supervisor

Voila—you're now responsible for achieving results through others. Now what? The focus of this workshop is on answering that question and helping both those who are new and seasoned in managing their people more effectively. Several skill-practices are included to provide sufficient opportunities for participants to practice new skills and techniques on coaching, delivering feedback, and leading a team.

**Learning objectives:**

- Understand the role of the Supervisor
- Identify an operational definition of coaching
- Understand the value of coaching in a supervisor’s work
- Use the Coaching Matrix and the four approaches of coaching it features
- Use interaction skills that help you achieve critical business objectives while satisfying people’s personal needs
- Deliver two types of feedback
- Identify the 7 Keys to Building Great Work Teams
- Prepare team development goals for current teams

### 16. Optimize Performance: My Role as a Leader

Shifting priorities, reduced budgets, do more with less! Equip your Supervisors, Managers and Leaders with the latest tools and techniques to accelerate employee performance and organizational effectiveness.

**Learning objectives**

- Reinforce the trends impacting local government operations, specifically Aviation operations.
- The Leadership Equation: Believability + Credibility = Trust
- Increase awareness of the external and internal factors that affect employee performance
- The Power of Workplace Culture: What's ours?
- Raise knowledge of the proven approaches to employee motivation and apply these approaches to the workplace
- Expand skills that encourage both the achievement of organizational and employee goals
• Balance telling and seeking and interaction skills to provide support, encourage involvement, and share responsibility.
• Utilize the Six Steps of Delegation;
• Deliver two types of feedback – Positive and Feedback for Improvement.

17. People Management: The Fundamentals

As employees make the transition from Individual Contributor to Supervisor or Manager, different skills and abilities are required. This module is designed to enable participants to negotiate the transition and “hit the ground running” in their new role.

Learning objectives:

• Identify the similarities, differences, and overall value of coaching and counseling
• Understand the components of effective feedback
• Identify methods used to resolve conflict in a professional manner
• Understand the impact on employee behavior of effective listening
• Utilize eight important ingredients of effective delegation
• Recognize the importance of employee performance review as a leadership opportunity

18. Performance Management

An effective performance management system helps employees succeed—so they can help the organization succeed. It provides enough guidance, so people understand what’s expected of them and enough flexibility and wiggle room so that individual creativity and strengths are nurtured. It provides enough control so that people understand what the organization is trying to accomplish. This module focuses on performance management as an integrated process of defining, assessing, and reinforcing employee work behaviors and outcomes. This includes translating the traditional performance management approach, which sees managing performance as an event (i.e. the performance review/appraisal), to a more effective approach in which performance is viewed as a process. As a process, several critical steps are involved to address performance deficiencies and augment successes.

Learning objectives:

• Recognize the Performance Management Process
• Summarize employee performance on the appraisal form
• Summarize performance in discussion with the employee
• Set behavioral objectives for the next performance cycle
• Identify tools to enhance the Performance Management Process
19. Positive Motivation Equals Positive Performance

Many of us believe that the difference between what employees can do and will do depends on the level of motivation. People in managerial and supervisory positions struggle with the fact that some people use more of their skills and talents than others do. While no individual alone can motivate another, they can provide the environment, relationship, and situations that make it possible for people to motivate themselves. This program is designed to help participants identify the factors that affect employee performance and those that influence the employees’ own internal motivation needs. Role play, problem solving, and goal setting are utilized to encourage creative ways of providing recognition, growth, and the development of employees for the achievement of personal and organizational goals.

Learning objectives:

- Become aware of the external and internal factors that affect employee performance
- Increase knowledge of the major theories of employee motivation
- Apply these theories to the workplace
- Expand skills that encourage both the achievement of organizational and employee goals

20. Presentation Skills

Speaking in front of others can be a confusing and even terrifying experience for many people. This training course helps participants take the mystery out of designing and delivering high-impact presentations. It will increase their confidence and effectiveness in making presentations to a wide variety of audiences. Participants will give one or more brief presentations while being videotaped and receive a critique.

Learning objectives:

- Understanding the Two Key Roles of Effective Presenters
- Overcome presentation fear
- Calm nerves using relaxation and breathing techniques
- Develop Your Voice
- Use Eye Contact, Gestures, Posture, and Movement for Maximum Impact
- Prepare Concise, Hard-Hitting, and Memorable Presentations
- Define Meaningful Objectives for Presenter and Audiences Alike
- Create Opening Statements that Grab the Audience
- Design the Body to Support Your Objectives and Opening Statements
- Use Power Point, Flip Charts, Overhead Projectors, and Podiums Effectively
- Successfully Close the Presentation
- Effectively handle the Q&A period
21. Project Management

In organizations, much of our time and effort is devoted to managing services and providing programs. Increasingly, we're spending more time managing projects, which require a different skill set. Projects have a definite beginning and end, which makes them distinct from the normal, ongoing work which requires special management skills related to providing deliverables, achieving milestones, and satisfying deadlines. This workshop is designed to help participants identify critical issues associated with project-management stages, understand how to use appropriate tools in managing a project, and learn and practice a variety of techniques required to manage projects successfully.

Learning objectives:

- Understand the difference between Projects and Operations
- Identify appropriate project-management behaviors
- Recognize how prepared your organization is to use project management skills to achieve results
- Determine steps to address strengths and areas for improvement in your organization's project-management capabilities
- Learn how to coalesce a team
- Prepare team development goals for your organization's existing teams
- How to develop a project plan
- Implement tools for executing a project
- Identify critical components needed for successful project management
- Utilize an enlarged repertoire of formats and scheduling methods

22. Providing Effective Feedback

Feedback is information shared in the here and now about how an individual or group is performing and how that performance impacts the organization. Without this information, people operate in a vacuum. Appropriate feedback can help us feel confident, build our trust in those giving us the feedback, and move us toward success. Knowing how we're performing on the job, at home, and in life is something everyone needs—and in most cases wants to know.

Learning objectives:

- Examine the importance of skillful communication in leading effectively
- Learn interaction skills that help you achieve critical business objectives while satisfying a person's individual needs
- Identify two types of feedback—Positive Feedback and Feedback for Learning
- Use the STAR Approach for delivering feedback
- Recognize the core elements of effective feedback
City of Menlo Park Employee Development Training Proposal

- Provide effective written and verbal feedback
- Decrease the chances of negative reaction to feedback for improvement

23. **R.A.P.I.D. Innovation: Converting Ideas into Results**

Governments are in business...in the business of public service. Whether in lean times or flush times, playing it safe is no longer playing it smart. Dramatic change is necessary today and using RAPID Innovation, leaders can inject a booster rocket into their organizational mind-set of problem-solving. Based on extensive research, RAPID Innovation is a fresh, problem solving tool designed to generate immediate dividends all through the directed efforts of your workforce.

RAPID is an acronym for:

- Ramp up the Idea Generator
- Analyze the Impact
- Prepare the solution
- Implement the solution
- D – do it again

The intent is for participants, upon returning to work, to take actions that enlist their workforce and encourage an 'innovative' style of solving problems needed during today’s unprecedented challenges.

**Learning Objectives**

- How to use the five-step approach of RAPID Innovation
- The three areas in your organization that should be the target of innovative solutions
- Techniques that many governments are using to foster an innovative culture
- How to get leaders to start accepting new ideas and discard past solutions
- Steps you can take immediately to strengthen your own innovation muscles.

24. **Strategic Planning for Action-Oriented People**

Strategic planning is a method of efficiently pursuing a single set of goals. This program is designed around a strategic planning procedure that can be used by individuals or teams to achieve desired results. Participants work in small groups that work together throughout the entire module. Utilizing group feedback and support, they work on developing a strategic plan as the module progresses.

**Learning objectives:**

- Utilize tools to identify manageable components of a problem
- Utilize skills to use in achieving successful planning outcomes
• Create an internal barometer to determine if planning is on-target
• Seek and accept verbal feedback regarding planning efforts

25. Supporting Employee Development

Employee skill development encompasses several competencies: how to teach skills, conduct skill practice, coach on-the-job performance, and adjust to the learning style of trainees. This workshop is intended for any manager, trainer, or supervisor who is responsible for initially teaching skills to employees and then providing ongoing support. The focus in this module is on interpersonal (versus technical) skills (e.g., interviewing, customer service, selling, making presentations, supervising, and telephone reception).

Learning objectives:

• Observe trainee performance
• Promote the trainee's use of problem-solving skills
• Give effective developmental performance feedback
• Set effective performance goals
• Recognize and adjust to the learning style of trainees

26. Taking Initiative: How to Be a Leader in Your Own Role

In today's workplace, it is essential that all members of the workforce, at all levels, take the lead in improving productivity. When workers take initiative, speak up, share ideas, and make input into how a job can be done more effectively and efficiently, the entire organization benefits. This program, developed specifically for administrative support staff and others who do not have the title of leader or manager, is designed to broaden understanding of what leadership is and to raise awareness of how anyone can take the lead in their own role.

Learning objectives:

• Recognize leadership behaviors and how to apply them in many situations
• Be familiar with functional leadership theory
• Utilize task and maintenance leadership actions
• Plan ways to develop leadership behaviors

27. What If We Tried It This Way? - Creative Problem Solving

Often, we're limited by the "we've always done it that way" approach. Solving problems in a creative manner can be the key to a more productive and satisfactory work life for employees. Creative problem solving is as much an art form as it is a scientific process. It requires creativity, intuition, and imagination. This program is designed to enable
participants to learn and apply concepts and techniques related to an integrated approach to creative problem solving.

Learning objectives:

- Understand problems in new ways
- Create a target for problem-solving efforts
- Acquire skills in developing novel solutions
- Become aware of how groups foster creative problem solving
- Develop an effective action plan for implementing creative solutions

28. Your Leadership Playbook

As catalysts for continuous improvement, government leaders are facing significant challenges during these uncertain times and are searching for a simple, powerful and productive approach to leadership in the 21st Century. In this workshop, football is utilized as the platform to outline a series of forward-thinking leadership practices guaranteed to help achieve improved performance.

Learning Objectives:

- Apply the principles of a forward-thinking strategy (Game Plan);
- To identify and use the Five Practices of Great Leaders (Offense);
- Utilize proven approaches to leading change (Defense);
- Implement leading edge practices for effective execution of services (Xs and Os);
- Successfully use methods of managing employee performance (Play Calling);
- Utilize techniques to develop future leaders (Team Players);
- Foster a leadership culture (the Field);
- Pursue a leadership competency (Touchdown);
- Digitally engage the public (Fans);
- Celebrate success (Tailgating).