

**Regular Meeting of the Mt. Pleasant City Commission**  
**Monday, February 24, 2025**  
**7:00 p.m.**

**AGENDA**

CALL TO ORDER:

PLEDGE OF ALLEGIANCE:

LAND ACKNOWLEDGEMENT STATEMENT:

ROLL CALL:

PROCLAMATIONS AND PRESENTATIONS:

1. Presentation from City Staff on the City Hall parking lot driveway entrance.

ADDITIONS/DELETIONS TO AGENDA:

PUBLIC INPUT ON AGENDA ITEMS:

RECEIPT OF PETITIONS AND COMMUNICATIONS:

2. Report on second 2025 deer cull.

CONSENT ITEMS:

3. Approval of minutes from the regular meeting held February 10, 2025.
4. Approval of a professional services contract with Fishbeck for \$159,000 to design the food waste receiving station at the Water Resource Recovery Facility (WRRF).
5. Approval of Revised Permanent Easement for Consumers Energy Electrical Facilities for City Hall Driveway Entrance Reconfiguration, 320 W. Broadway Street.

*All interested persons may attend and participate. Persons with disabilities who need assistance to participate may call the Human Resources Office at 989-779-5313. A 48-Hour advance notice is necessary for accommodation. Hearing or speech impaired individuals may contact the City via the Michigan Relay Service by dialing 7-1-1. Public Comment and Public Hearings are opportunities for the public to comment on business and non-business items. Questions will not be answered during these times and instead should be directed to City Hall staff during normal business hours.*

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6. Award the 2025 Lime Residuals Removal contract to MAK Enterprises, of Mt. Pleasant, at \$28.00 per cubic yard, and a not-to-exceed contract amount of \$429,000.
7. Award the contract for the 2025 Pavement Marking Project to M & M Pavement Marking, Inc. of Grand Blanc, Michigan for \$42,736.
8. Approve amendment to the professional engineering services agreement with Mead and Hunt for \$8,810 to include procurement of a wheel loader for the Mt. Pleasant Regional Airport, and authorize the city manager to sign the amendment.
9. Approve three-year dumpster service contracts with Granger for DPS, Streets, and the parks.
10. Approval of Payrolls & Warrants.

**PUBLIC HEARINGS:**

**NEW BUSINESS:**

11. Consider Recommendation from the Appointments Committee for the City Commission vacancy.
12. Consider Request For Proposals for City Employee Climate Survey.
13. Discuss Resident Difficulty with Refuse and Recycling Carts During Snow Events.
14. Approve the PC Replacements for the Windows 11 Upgrade for \$100,000 and the approval of a budget amendment of \$69,400.
15. Award the contract for the 2025 Mill & Overlay Project to Central Asphalt, Inc. for \$1,414,545.00, and approval of a budget amendment of \$346,180.00.
16. Distribute City Manager Review Packet.

**ANNOUNCEMENTS ON CITY-RELATED ISSUES AND NEW BUSINESS:**

**PUBLIC COMMENT ON AGENDA AND NON-AGENDA ITEMS:**

*All interested persons may attend and participate. Persons with disabilities who need assistance to participate may call the Human Resources Office at 989-779-5313. A 48-Hour advance notice is necessary for accommodation. Hearing or speech impaired individuals may contact the City via the Michigan Relay Service by dialing 7-1-1. Public Comment and Public Hearings are opportunities for the public to comment on business and non-business items. Questions will not be answered during these times and instead should be directed to City Hall staff during normal business hours.*



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RECESS:

WORK SESSION:

17. TIFA discussion.

RECESS:

CLOSED SESSION:

18. Consider closed session pursuant to subsection 8(c) of the Open Meetings Act for strategy and negotiation sessions connected with the negotiation of a collective bargaining agreement.

ADJOURNMENT:

*All interested persons may attend and participate. Persons with disabilities who need assistance to participate may call the Human Resources Office at 989-779-5313. A 48-Hour advance notice is necessary for accommodation. Hearing or speech impaired individuals may contact the City via the Michigan Relay Service by dialing 7-1-1. Public Comment and Public Hearings are opportunities for the public to comment on business and non-business items. Questions will not be answered during these times and instead should be directed to City Hall staff during normal business hours.*

TO: MAYOR AND CITY COMMISSION

FEBRUARY 24, 2025

FROM: AARON DESENTZ, CITY MANAGER

SUBJECT: CITY MANAGER REPORT ON AGENDA ITEMS

Proclamations and Presentations:

1. Presentation from City Staff on the City Hall parking lot driveway entrance.
  - a. At the upcoming City Commission meeting staff will present a proposed project to reconfigure the entryway to City Hall. The proposed reconfiguration will align the entryway with Oak Street and improve safety and access. The cost of the project would be budget neutral as staff anticipates that savings from the budgeted expense for parking lot repairs vs the actual bids resulted in anticipated savings.

Consent Items:

4. Approval of a professional services contract with Fishbeck for \$159,000 to design the food waste receiving station at the Water Resource Recovery Facility.(WRRF).
  - a. Staff is recommending that the City Commission approve a professional services contract with Fishbeck for \$159,000 to design the food waste receiving station at the Water Resource Recovery Facility (WRRF). Following design and construction, the food waste receiving station will allow the City to accept food waste from the Central Michigan University (CMU) cafeterias. Fishbeck was selected as the engineering consultant for this project due to their successful completion of all engineering work for the WRRF's Phase I and II upgrades. This contract includes design services, preparation of bid documents, and construction administration.
5. Approval of Revised Permanent Easement for Consumers Energy Electrical Facilities for City Hall Driveway Entrance Reconfiguration, 320 W. Broadway Street.
  - a. Following a presentation from the City staff on the City Hall parking lot driveway entrance, staff is recommending that the City Commission approve a revised permanent easement for Consumers Energy electrical facilities at the City Hall driveway entrance. Consumers Energy has agreed to move the electrical pole in the driveway to the east at no cost to the city, allowing the driveway to be reconfigured. The proposed reconfiguration will align the entryway with Oak Street and improve safety and access. The cost of the project would be budget neutral as staff anticipates that savings from the budgeted expense for parking lot repairs vs the actual bids resulted in anticipated savings.
6. Award the 2025 Lime Residuals Removal contract to MAK Enterprises, of Mt. Pleasant, at \$28.00 per cubic yard, and a not-to-exceed contract amount of \$429,000.
  - a. Staff is recommending that the City Commission award the 2025 Lime Residuals Removal contract to MAK Enterprises for \$28.00 per cubic yard and a not-to-exceed contract amount of \$429,000. This year's pricing matches the pricing offered last year. The water treatment plant softens well water using a lime/caustic softening process.

The biproduct of this is spent lime residuals which is annually removed from the plant and typically used as agricultural soil conditioner.

7. Award the contract for the 2025 Pavement Marking Project to M & M Pavement Marking, Inc. of Grand Blanc, Michigan for \$42,736.
  - a. Staff is recommending that the City Commission award the contract for the 2025 Pavement Marking Project to M & M Pavement Marking, Inc. of Grand Blanc, Michigan for \$42,736. A map of the pavement markings to be completed is in the packet which includes crosswalks, edge striping, railroad crossings, shared lanes, bike lanes, and stop bars.
8. Approve amendment to the professional engineering services agreement with Mead and Hunt for \$8,810 to include procurement of a wheel loader for the Mt. Pleasant Regional Airport, and authorize the city manager to sign the amendment.
  - a. In November 2024, the City Commission approved a professional engineering services agreement with Mead and Hunt for \$18,409 for the procurement of a tractor-mounted snow blower for use at the airport. Due to some limits of the equipment in question, a modification will be necessary in order to develop the equipment as a viable and cost-effective option for snow removal. The additional cost for this work is \$8,810, for total contract cost of \$27,219. Reimbursement will occur upon purchase of the equipment. External funding will cover 90% of the total cost. The city's net contract cost will be \$1,361.
9. Approve three -year dumpster service contracts with Granger for DPS, Streets, and the parks. Funds will be included in each department's respective years' operating budget.
  - a. Staff is recommending that the City Commission approve three-year dumpster service contracts with Granger for DPS, Streets, and the parks at the pricing listed in the attached memo. Funds will be included in each department's respective years' operating budget. By transitioning to Granger, the city is expected to save approximately \$12,000 annually. The dumpsters are needed to support City operations in streets and in parks.

#### Public Hearings:

#### New Business:

12. Consider Request For Proposals for City Employee Climate Survey.
  - a. Staff has provided the responses to the Request for Proposal (RFP) for a City Employee Climate Survey. Staff is asking for direction from the City Commission on how they would like to proceed.
    - i. Recommended Action: None at this time.
13. Discuss Resident Difficulty with Refuse and Recycling Carts During Snow Events.
  - a. Staff has provided a memo to the City Commission as a follow-up from a request from the City Commission regarding difficulties that some residents are experiencing with the new trash and recycling containers; particularly in the snow. Staff lists several resources and actions that residents can use/do.
    - i. Recommended Action: None at this time.

14. Approve the PC Replacements for the Windows 11 Upgrade for \$100,000 and the approval of a budget amendment of \$69,400.
  - a. Staff is recommending that the City Commission approve the purchase of several computers within the organization. This is required as Windows 10 operating system will reach its end of life at the beginning of Q4. Allowing the computers to operate beyond this timeline places the City's network at risk to hostile actors. Staff has identified a MI Deal partner which provides the lowest pricing available. Staff estimates the total cost of replacements to be \$100,000.
    - i. Recommended Action: A motion to approve the PC Replacements for the Windows 11 Upgrade for \$100,000 and the approval of an IT budget amendment of \$69,400 to supplies to accommodate these purchases.
15. Award the contract for the 2025 Mill & Overlay Project to Central Asphalt, Inc. for \$1,414,545.00, and approval of a budget amendment of \$346,180.00.
  - a. Staff is recommending that the City Commission award the contract for the 2025 Mill & Overlay Project to Central Asphalt Inc, Mt. Pleasant, Michigan for \$1,414,545.00. This work includes removal and replacement of some existing curbs, gutters and sidewalk ramps for upgrades due to ADA requirements. The project schedule is June 2 to July 18. A list of the proposed road treatments and a map of these projects is included in the packet. The city was awarded an additional \$800,000.00 in road funding from the state, allowing for various streets to be moved ahead in the CIP schedule.
    - i. Recommended Action: A motion to award the contract for the 2025 Mill & Overlay Project to Central Asphalt, Inc. for \$1,414,545.00, and approval of a budget amendment of \$346,180.00 from the Major Street fund and a budget amendment of \$367,390.00 from the Local Street fund, for the additional resurfacing of Major Streets and Local Streets.

Work Session:

17. TIFA discussion.
  - a. In a 2024 work session the City Commission authorized staff to discontinue the Industrial Park North TIFA and to continue the Mission Street DDA TIFA. The City Commission wanted to wait until later to determine the future of the Central Business District (CBD) Tax Increment Finance Authority (TIFA). In the packet, you will find a presentation on the CBD TIFA. The presentation provides information on the basic functions of the TIFA, its current taxable value, where funding would come from to support the TIFA, and what projects and programs the TIFA could support. The City Commission will be asked to provide staff with direction on if the TIFA should capture taxes in the future and for what purpose/programs, or if the TIFA should not be continued.

Closed Session:

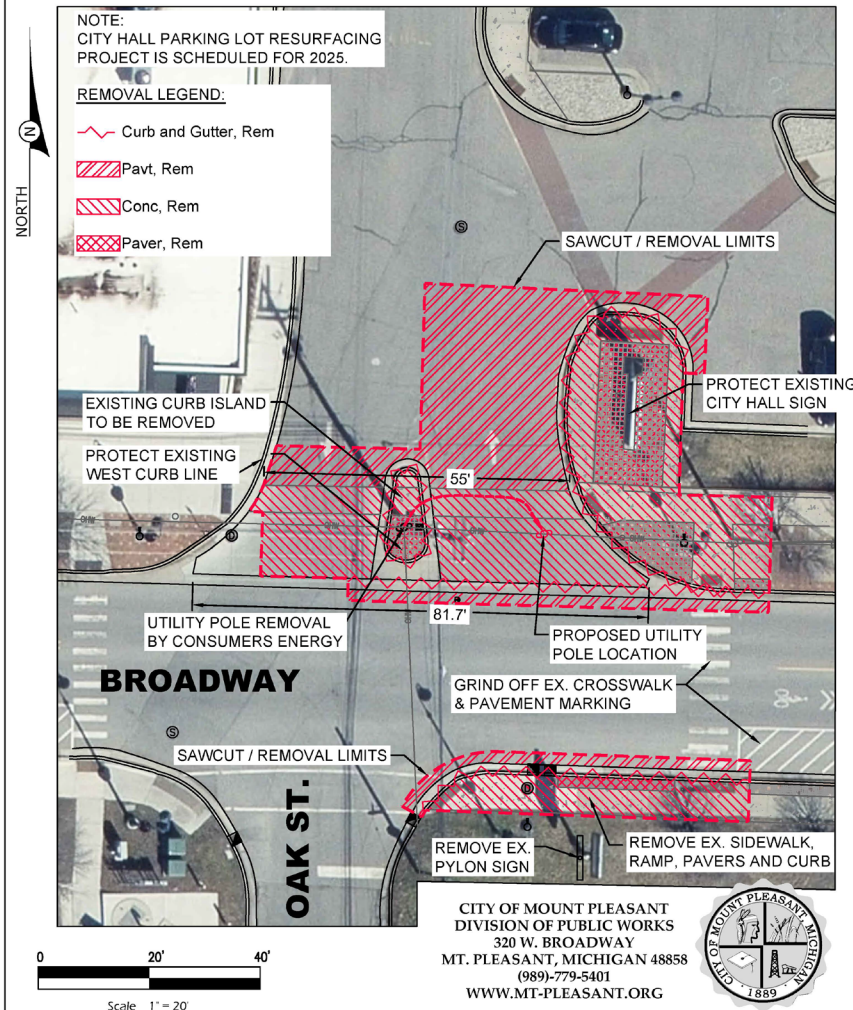
18. Consider closed session pursuant to subsection 8(c) of the Open Meetings Act for strategy and negotiation sessions connected with the negotiation of a collective bargaining agreement.
  - i. Recommended Action: A motion to enter closed session pursuant to subsection 8(c) of the Open Meetings Act for strategy and negotiation sessions connected with the negotiation of a collective bargaining agreement.

# CITY HALL DRIVEWAY RECONFIGURATION

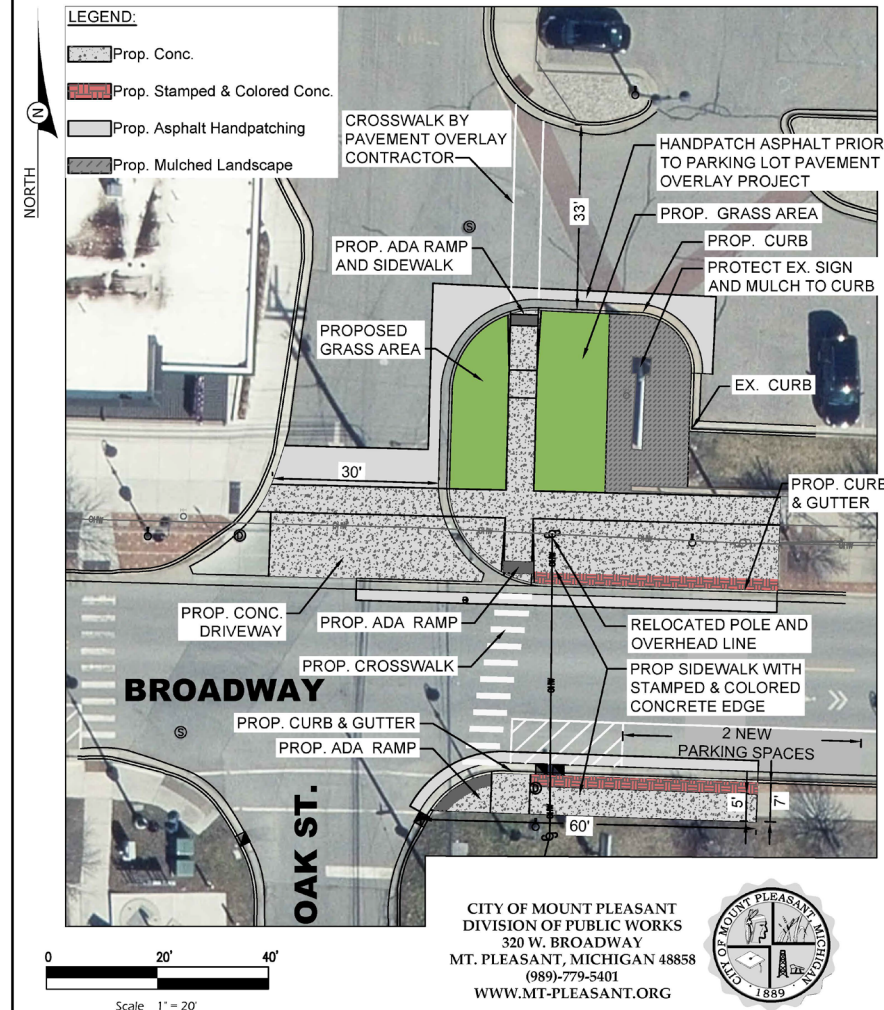
## Project Overview

- Reconfigure City Hall entrance driveway from Broadway Street
- Relocate Consumers Energy power pole in center of drive
- Align City Hall entrance with Oak Street
- Narrow City Hall entrance to shorten pedestrian crossing

EXISTING SITE & REMOVAL PLAN  
CITY HALL DRIVEWAY



PROPOSED SITE PLAN  
CITY HALL DRIVEWAY





# HISTORY

- Consumers Energy power pole in center of driveway
- High cost quoted by Consumers to move during City Hall design and construction in 2006-2008
- Consumers Energy now agrees to move the pole up to 25' east at no cost to city
- Revised Consumers easement required for relocated pole and wires

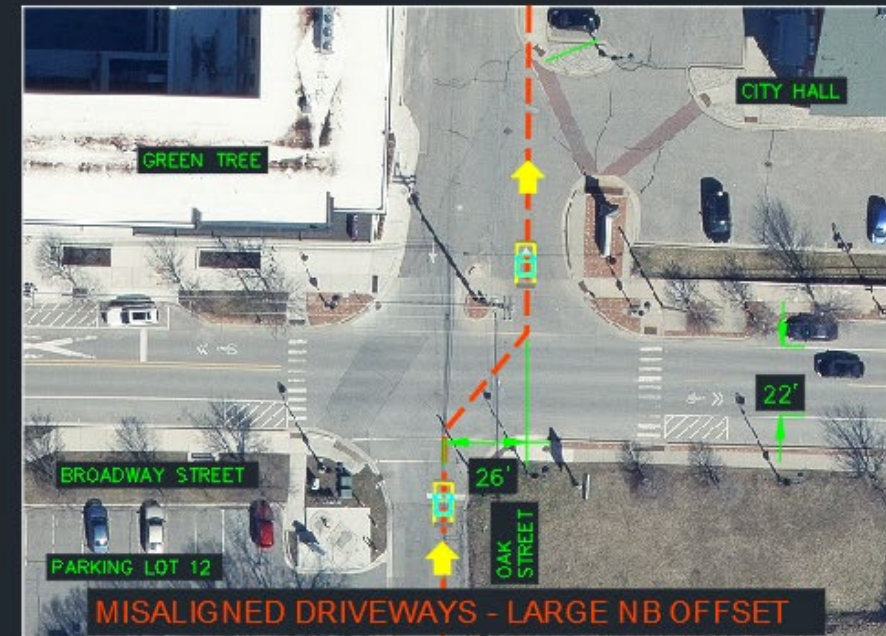
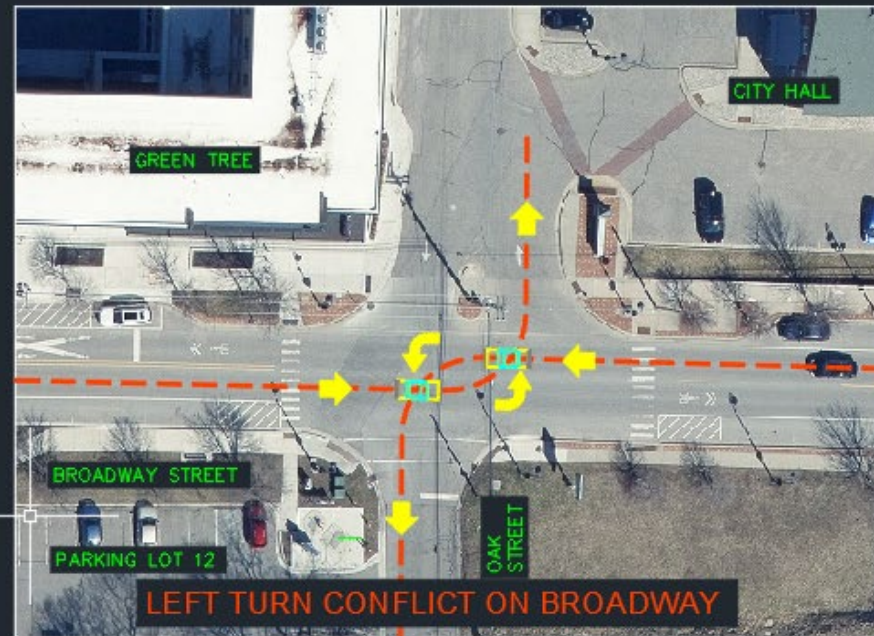


*Mt. Pleasant*  
[meet here]



# SAFETY ISSUES

1. Left turn conflict on Broadway
2. Misalignment of Oak Street with drive
3. Entry/Exit conflict and confusion
4. Large pedestrian crossings
5. Cut-through speeding





# PROPOSED MASTER PLAN UPDATE OAK STREET EXTENSION TO ISLAND PARK

- “Create access between Downtown and Island Park such as through an extension of South Oak Street”





# COSTS

- Engineer's Estimate for Driveway Reconfiguration
  - \$88,000
- Parking Lots 4 and 5
  - Budget - \$783,000
  - Bid - \$598,244
  - Cost Savings - \$184,756
- City Hall Parking Lots and Drives
  - Changed from Mill and Overlay to Thin Overlay Due to Ex. Pavement Thickness from Soil Boring Results
  - Budget - \$125,600
  - Bid - \$65,110
  - Cost Savings - \$60,490



# PROJECT TIMELINE

- ❑ City Commission approval of revised Consumers Energy easement and change order for parking lot contract in February and March 2025
- ❑ Coordinate Consumers Energy pole relocation before June of 2025
- ❑ Reconstruct entrance of parking lot before thin overlay project
  - Estimate 3 weeks to complete
  - Keep half of entrance open during construction
- ❑ City Hall parking lots and driveways to be thin overlaid in June/July of 2025
  - 2 or 3 day project to thin overlay and restripe



*Mt. Pleasant*  
[meet here]

# QUESTIONS



*Mt. Pleasant*  
[meet here]



## **DIVISION OF PUBLIC SAFETY CITY OF MT. PLEASANT**

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804 E. High Street, Mount Pleasant, MI 48858  
Phone: (989) 779-5100 Fax: (989) 773-4020



### **MEMORANDUM**

**DATE:** February 11, 2025  
**TO:** Aaron Desentz, City Manager  
**FROM:** Paul Lauria, Director of Public Safety  
**SUBJECT:** Deer Cull

The second deer cull took place on February 6, 2025 in Chipp-A-Waters Park. Eight (8) deer were harvested and transported to the processor for the packaging of the meat. Once the meat is processed it will be distributed to non-profits like Hunters for Hunger, the Isabella County Soup Kitchen, and the Community Kitchen (7<sup>th</sup> Generation) at the Saginaw Chippewa Indian Tribe.

The only change from the previous cull was that we provided fliers to homes that border the park. This was well received by residents and will be continued in future culls.

Between both culls, we harvested 38 deer from the park. We know there are many more deer in the area that need to be harvested. However, I am recommending that no additional culls be conducted until at least December 2025 through January 2026.

Once final costs are determined I will complete a memorandum to the Commission. If you have any questions or concerns, please let me know.

Minutes of the regular meeting of the City Commission held Monday, February 10, 2025, at 7:00 p.m., in the City Commission Room, 320 W. Broadway St., Mt. Pleasant, Michigan with virtual options.

Mayor Wingard called the meeting to order.

The Pledge of Allegiance was recited.

Land Acknowledgement statement was recited.

Commissioners Present: Mayor Boomer Wingard and Vice Mayor Maureen Eke;  
Commissioners Mary Alsager; Liz Busch; Amy Perschbacher & Grace Rollins

Commissioners Absent: None

Others Present: City Manager Aaron Desentz and Deputy City Clerk Marilyn Wixson

#### Proclamations and Presentations

Mayor Wingard read a Proclamation recognizing February as Black History Month.

Manager Desentz gave a presentation on 2024 and 2025 Goals and Objectives.

#### Additions/Deletions to Agenda

Moved by Vice Mayor Eke and seconded by Commissioner Alsager to approve the Agenda as presented. Motion unanimously adopted.

#### Public Input on Agenda Items

#### Receipt of Petitions and Communications

Received the following petitions and communications:

3. Fourth Quarter Investment Report.
4. Report on 2025 deer cull.
5. Monthly report on police related citizen complaints received.

Moved by Commissioner Busch and seconded by Vice Mayor Eke to approve the following items on the Consent Calendar:

6. Minutes of the regular meeting of the City Commission held January 27, 2025.
7. Minutes of the closed session of the City Commission held January 27, 2025.
8. Bid of H&H Concrete of Clare, Michigan for 2025 Sidewalk Replacement Project in the amount of \$177,223 and a budget amendment of \$11,940 for Division I in the general fund budget and corresponding transfer from the streets funds. The budget amendment is for CMU reimbursement.
9. Payrolls and Warrants dated between January 10, 2025 and February 6, 2025 all totaling \$975,536.03.

Motion unanimously adopted.

Moved by Commissioner Busch and seconded by Commissioner Rollins to approve a budget amendment to allocate \$1,976,000 from the unallocated fund balance for Retaining Wall, Parking Lot 4, and Parking Lot 5 projects, reducing the unassigned fund balance to an estimated \$5,918,840. Motion unanimously adopted.

Moved by Commissioner Busch and seconded by Commissioner Rollins to approve bid of McGuirk Sand & Gravel of Mt. Pleasant, Michigan for Parking Lots 4 & 5 Reconstruction Project in the amount of \$598,245.00. Motion unanimously adopted.

#### Announcements on City-Related Issues and New Business

Vice Mayor Eke commented that CMU will be hosting many events in honor of Black History month. Check out their calendar of events for information. She hopes residents will attend the free events.

Commissioner Perschbacher announced that the fee for recycling will be removed from utility bills with the March billing. She requested that Applications for vacant City Commission seat be placed in the Commissioner's drop boxes for review.

Commissioner Rollins noted that some of the elderly residents have brought to her attention that with the snow and ice outside they are having difficulty getting the new trash bins out to the curb for trash pick up. She requested that the Commission be proactive in finding a solution to this issue. Discussion ensued. Will consider future work session on the topic.

Mayor Wingard announced that Applications will be taken for vacant Commission seat until 4:30 p.m. on Wednesday, February 12<sup>th</sup>. The appointment will run until the August 5, 2025 Special Election. Please see the City website for further details.

Vice Mayor Eke requested an update on the Workplace Climate Survey. Manager Desentz responded that the RFP has been sent out and is posted on bidnet and MML's website.

#### Public Comment on Agenda and Non-Agenda Items

Bill Gerstenlauer, 1514 E. Gaylord, spoke on concerns with getting garbage bins to and from the curb. He indicated that he helps his neighbors in need and hopes others will do the same.

The Commission recessed at 8:06 p.m. and returned at 8:13 p.m.

#### WORK SESSION: City Manager review process.

Mayor Wingard led a discussion on City Manager review process. The Commission discussed many review options and decided to move forward with option two from the three options provided by Mayor Wingard.

Moved by Commissioner Alsager and seconded by Vice Mayor Eke to adjourn the meeting at 8:50 p.m. Motion unanimously adopted.

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Boomer Wingard, Mayor

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Marilyn Wixson, Deputy City Clerk

# Memorandum



TO: Aaron Desentz, City Manager

FROM: Jason Moore, DPW Director

DATE: February 4, 2025

SUBJECT: Approve Professional Services Contract with Fishbeck for Food Waste Process Design – Water Resource Recovery Facility

## Request

The City Commission is requested to approve a professional services contract with Fishbeck for \$159,000 to design the food waste receiving station at the Water Resource Recovery Facility (WRRF).

## Reason

DPW staff has been working with Central Michigan University to accept food waste from the University's cafeterias. Currently, the WRRF does not have the necessary equipment to accept food waste and process it for use in the anaerobic digesters. To support and protect the anaerobic digestion process, a disposal station for haulers will be installed. Haulers will empty totes of food waste into a chute that leads to a grinder. The ground-up waste will be moved by an auger into an old rectangular settling tank that is no longer in use. Liquids will flow back to the settling tank through pipes. The solids will be pumped directly into the anaerobic digester, while the leftover liquid will return to the plant's process flow. A small fiberglass building will be added to cover the grinder and protect it from the weather. Power for the new setup will be connected to the existing electrical system in the digester building. This project has been on hold during the Phase II upgrades at the WRRF. However, we expect construction to begin in the fall of 2025.

Fishbeck was selected as the engineering consultant for this project due to their successful completion of all engineering work for the WRRF's Phase I and II upgrades. This contract includes design services, preparation of bid documents, and construction administration.

The city has secured \$500,000 in grant funding from the Michigan Department of Environment, Great Lakes, and Energy, along with a \$300,000 Tribal 2% grant as matching funds. These grants will fully cover the engineering costs.

## Recommendation

I recommend the City Commission approve a professional services contract with Fishbeck for \$159,000 to design the food waste receiving station at the Water Resource Recovery Facility.



# City of Mt. Pleasant, Michigan

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CITY HALL  
320 W. Broadway • 48858  
(989) 779-5300  
(989) 773-4691 fax

PUBLIC SAFETY  
804 E. High • 48858  
(989) 779-5100  
(989) 773-4020 fax

PUBLIC WORKS  
320 W. Broadway • 48858  
(989) 779-5400  
(989) 772-6250 fax

February 6, 2025

TO: Aaron Desentz, City Manager

FROM: Stacie Tewari, City Engineer

SUBJECT: Approval of Revised Permanent Easement for Consumers Energy Electrical Facilities for City Hall Driveway Entrance Reconfiguration, 320 W. Broadway Street

The existing city hall entrance driveway from Broadway Street is offset from Oak Street due to an existing Consumers Energy power pole in the center of the driveway. This offset creates a left turn conflict on Broadway at Oak Street. In addition, there are frequent conflicts with cars turning from Broadway into the “exit” side of the driveway in conflict with exiting vehicles. This very wide driveway also creates a less safe crossing for pedestrians.

City staff has communicated with Consumers Energy, and Consumers has agreed to move the pole in the driveway 25’ east at no cost to the city, so that the driveway can be reconfigured, as shown in the attached concept sketches. Additionally, the next city master plan update will include a recommendation for a future extension of Oak Street into Island Park. The city hall driveway reconfiguration and alignment of the driveway with Oak Street would accommodate this future Oak Street extension. A separate City Commission memo will be provided for approval of the construction amendment for the city hall entrance driveway construction work. This work will be coordinated with the proposed asphalt overlay project of the city hall drives and parking lots in the summer of 2025. The Consumers Energy easement and pole relocation must be approved first to be able to accommodate the reconfiguration of the driveway.

Consumers Energy requires that the existing permanent easement across the city hall property be revised for the relocated power poles. The revised easement will be 30’ wide, 15’ each side of the relocated electrical line, as installed.

## **Recommended Action:**

I recommend that the City Commission authorize the mayor to sign the revised permanent easement for the Consumers Energy power pole and electrical line relocations at city hall.

4/28/2023

City of Mt. Pleasant  
320 W Broadway St.  
Mt. Pleasant, MI 48858

SAP# 1061781205

Design # 11455954

In order to install Electric for 320 W Broadway St., Mt. Pleasant, Michigan, we must secure permission to cross a portion of your property with our Electric Facilities, as shown in Exhibit B of the easement.

Enclosed is our standard right-of-way easement form. Please sign this instrument **with only black ink** where indicated (**signatures must be notarized**) and return the **original** document at your earliest convenience. Your promptness in having this instrument signed, notarized and returned will enable us to proceed with our construction plans.

If you have any questions concerning the design of this job, please call James Leedy, 989-329-1834. If you have any questions regarding the easement, please contact Patrick Lavery, 989-259-8008.

**This Easement is being sent to you from our Document Preparation Department, please do not reply directly to the sender. For any questions or concerns you may have, please direct them to the Agent with the provided information below.**

**After signed and notarized please mail the original back to:**

**Patrick W. Lavery # CLR-100F  
Consumers Energy Company  
1 Consumers Energy Parkway,  
Clare, MI 48617  
989-259-8008**

Thank you very much for your cooperation in this matter.

## EASEMENT FOR ELECTRIC FACILITIES

Master Tract# ROW000916077849  
SAP# 1061781205  
Design# 11455954  
Agreement# MI00000071120

CITY OF MOUNT PLEASANT, a Michigan municipal corporation, whose address is 320 West Broadway Street, Mount Pleasant, Michigan 48858 (hereinafter "Owner")

for \$1.00 and other good and valuable consideration [exempt from real estate transfer tax pursuant to MCLA 207.505(f) and from State real estate transfer tax pursuant to MCLA 207.526(f)] grants and warrants to

CONSUMERS ENERGY COMPANY, a Michigan corporation, One Energy Plaza, Jackson, Michigan 49201 (hereinafter "Consumers")

a permanent easement to enter Owner's land (hereinafter "Owner's Land") located in the City of Mount Pleasant, County of Isabella, and State of Michigan as more particularly described in the attached Exhibit A to construct, operate, maintain, inspect (including aerial patrol), survey, replace, reconstruct, improve, remove, relocate, change the size of, enlarge, and protect a line or lines of electric facilities in, on, over, under, across, and through a portion of Owner's Land (hereinafter "Easement Area") as more fully described in the attached Exhibit B, together with any pole structures, poles, or any combination of same, wires, cables, conduits, crossarms, braces, guys, anchors, transformers, electric control circuits and devices, location markers and signs, communication systems, utility lines, protective apparatus and all other equipment, appurtenances, associated fixtures, and facilities, whether above or below grade, useful or incidental to or for the operation or protection thereof, and to conduct such other activities as may be convenient in connection therewith as determined by Consumers for the purpose of transmitting and distributing electricity.

Additional Work Space: In addition to the Easement rights granted herein, Owner further grants to Consumers, during initial construction and installation only, the right to temporarily use such additional work space reasonably required to construct said lines. Said temporary work space shall abut the Easement Area, on either side, as required by construction.

Access: Consumers shall have the right to unimpaired access to said line or lines, and the right of ingress and egress on, over, and through Owner's Land for any and all purposes necessary, convenient, or incidental to the exercise by Consumers of the rights granted hereunder.

Trees and Other Vegetation: Owner shall not plant any trees within the Easement Area. Consumers shall have the right from time to time hereafter to enter Owner's Land to trim, cut down, and otherwise remove and control any trees, brush, roots, and other vegetation within the Easement Area. Consumers shall have the right from time to time hereafter to enter Owner's Land to trim, cut down, and otherwise remove and control any trees, brush, or other vegetation located outside of the Easement Area which are of such a height or are of such a species whose mature height that in falling directly to the ground could come into contact with or land directly above Consumers' facilities.

Buildings/Structures: Owner agrees not to build, create, construct, or permit to be built, created, or constructed, any obstruction, building, septic system, drain field, fuel tank, pond, swimming pool, lake, pit, well, foundation, engineering works, installation or any other type of structure over, under, or on said Easement Area, whether temporary or permanent, natural or man-made, without a prior written agreement executed by Consumers' Real Estate Department expressly allowing the aforementioned.

Ground Elevation: Owner shall not materially alter the ground elevation within the Easement Area without a prior written agreement executed by Consumers Real Estate Department allowing said alteration.

Exercise of Easement: Consumers' nonuse or limited use of this Easement shall not preclude Consumers' later use of this Easement to its full extent.

Ownership: Owner covenants with Consumers that they are the lawful fee simple owner of the aforesaid lands, and that they have the right and authority to make this grant, and that they will forever warrant and defend the title thereto against all claims whatsoever.

Successors: This Easement shall bind and benefit Owner's and Consumers' respective heirs, successors, lessees, licensees, and assigns.

Counterparts: This Easement may be executed simultaneously in two or more counterparts, each of which shall be deemed an original and all of which together shall constitute one and the same instrument. It is not necessary that all parties execute any single counterpart if each party executes at least one counterpart.

Date: \_\_\_\_\_

Owner: CITY OF MOUNT PLEasant, a Michigan municipal corporation

\_\_\_\_\_  
Signature

By: \_\_\_\_\_

Print name

Its: \_\_\_\_\_

Print title

Acknowledgment

The foregoing instrument was acknowledged before me in \_\_\_\_\_ County, \_\_\_\_\_

on \_\_\_\_\_ by \_\_\_\_\_ of City of Mount Pleasant, a  
Date Name Title

Michigan municipal corporation, on behalf of the corporation.

\_\_\_\_\_  
Notary Public

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
County, \_\_\_\_\_

Acting in \_\_\_\_\_ County

My Commission expires: \_\_\_\_\_

**PROPERTY OWNERS MAIL  
SIGNED EASEMENT TO:**

Patrick Lavery #CLR-100F  
Consumers Energy Company  
1 Consumers Energy Parkway  
Clare, MI 48617

Prepared By:  
Rebecca Hyatt 04/28/23 P24-720  
Consumers Energy Company  
1945 W Parnall Rd  
Jackson, MI 49201

**REGISTER OF DEEDS OFFICE USE  
ONLY**

Return recorded instrument to:  
Carrie J. Main, P24-720  
Consumers Energy Company  
1945 W Parnall Rd  
Jackson, MI 49201

EXHIBIT A

Owner's Land

Land situated in the City of Mount Pleasant, County of Isabella, State of Michigan:

**Part of the Northwest 1/4 of Section 15, Town 14 North, Range 4 West, described as: An area 60 feet wide, lying 30 feet either side of a line commencing at a point which is North 2° 33' East 33 feet and North 87° 27' West 166.32 feet from the Northwest corner of Lot 6, Block 7, Original Plat, as recorded in Liber 3, Page 143, running thence South 85° 22' West 248.72 feet, thence North 85° 48' West 852.9 feet to a point of ending.**

Also known as: Island Park, Mount Pleasant, Michigan 48858

Parcel ID: 17-000-15-841-00

AND

Owner's Land

**PARCEL C**  
**(W. Broadway)**

Part of the Southeast  $\frac{1}{4}$  of the Northwest  $\frac{1}{4}$  of Section 15, T14N, R4W, City of Mt. Pleasant, Isabella County, Michigan, more particularly described as: Beginning at a point on the Northerly right of way line of Broadway Street, which is N 89 deg 55 min 33 sec W, along the East and West  $\frac{1}{4}$  line of said Section 15, 203.00 feet and N 00 deg 01 min 00 sec E, parallel with the North and South  $\frac{1}{4}$  line of said Section 15, 43.75 feet from the Interior  $\frac{1}{4}$  corner of said Section 15; then continuing N 00 deg 01 min 00 sec E, parallel with said North and South  $\frac{1}{4}$  line, 247.95 feet; then 83.70 feet along a curve to the left having a chord bearing and distance of N 56 deg 48 min 24 sec E, 83.58 feet, a radius of 448.69 feet, a delta angle of 10 deg 41 min 18 sec, and a degree of curve of 12 deg 46 min 10 sec; then N 00 deg 01 min 00 sec E, parallel with said North and South  $\frac{1}{4}$  line, 125.16 feet to a point on a top of bank river traverse line; then along said top of bank traverse line the following two courses: S 70 deg 17 min 25 sec W, 259.53 feet and S 76 deg 38 min 31 sec W 285.37 feet to the end of said top of bank traverse line; then S 00 deg 08 min 30 sec W, 252.85 feet to a point on said Northerly right of way line of Broadway Street; then S 88 deg 24 min 37 sec E (recorded as S 88 deg 17 min 00 sec E) along said Northerly right of way line, 452.75 feet to the point of beginning, EXCEPT that part of the Southeast  $\frac{1}{4}$  of the Northwest  $\frac{1}{4}$  of Section 15, T14N, R4W, City of Mt. Pleasant, Isabella County, Michigan, described as: Beginning at a point which is N 89 deg 55 min 33 sec W. along the East and West  $\frac{1}{4}$  line of said Section 15, 344.61 feet and N 02 deg 28 min 46 sec E, 47.46 feet from the Interior  $\frac{1}{4}$  corner of said Section 15; then S 88 deg 24 min 37 sec E, along the North line of Broadway St., 35 ft., then N 02 deg 28 min 46 sec E, 48.39 feet; then S 87 deg 18 min 34 sec E, 42.88 feet; then N 02 deg 44 min 32 sec E, 88.15 feet; thence N 87 deg 19 min 07 sec W, 292.69 feet; then S 02 deg 37 min 26 sec W, 88.19 feet; then S 87 deg 22 min 51 sec E, 136.84 feet; then S 02 deg 47 min 05 sec W, 50.31 feet to the North line of Broadway St.; then S 88 deg 24 min 37 sec E, 113.86 feet along the North line of Broadway St. to the point of beginning;

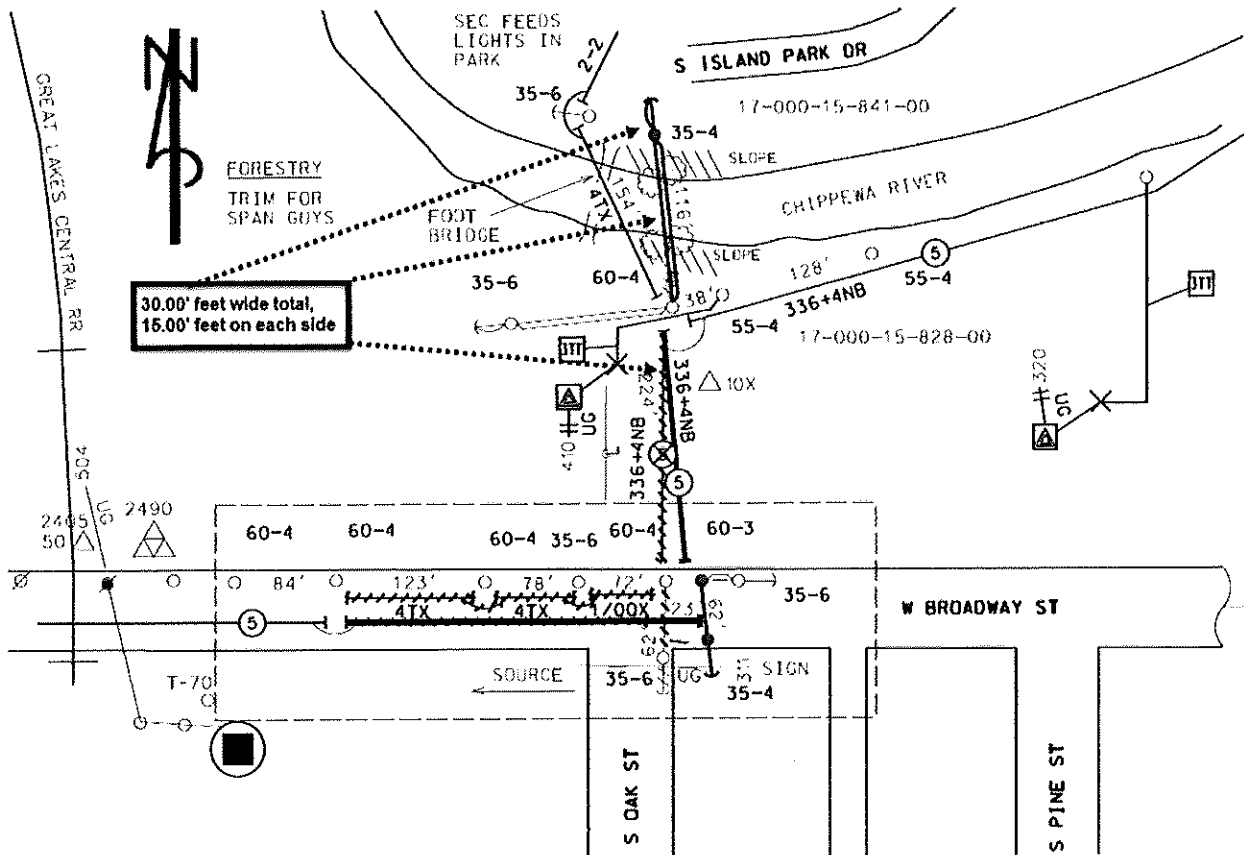
Also known as: 320 West Broadway Street, Mount Pleasant, Michigan 48855

Parcel ID: 17-000-15-828-00

EXHIBIT B

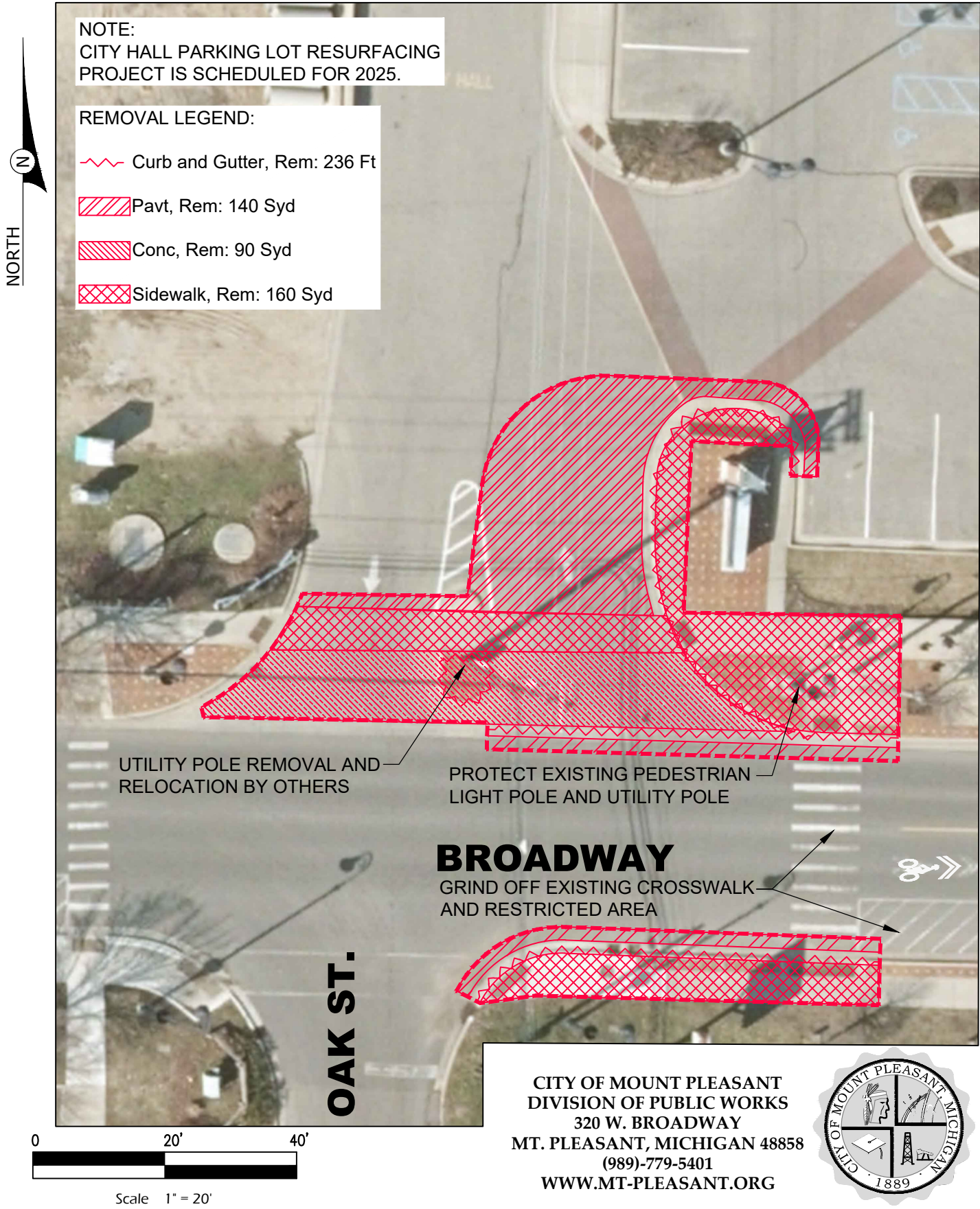
Easement Area

A 30.00-foot-wide strip of land, being 15.00 feet on each side of the centerline of the line constructed on Owner's Land, the centerline to be located approximately as shown in the attached drawing.

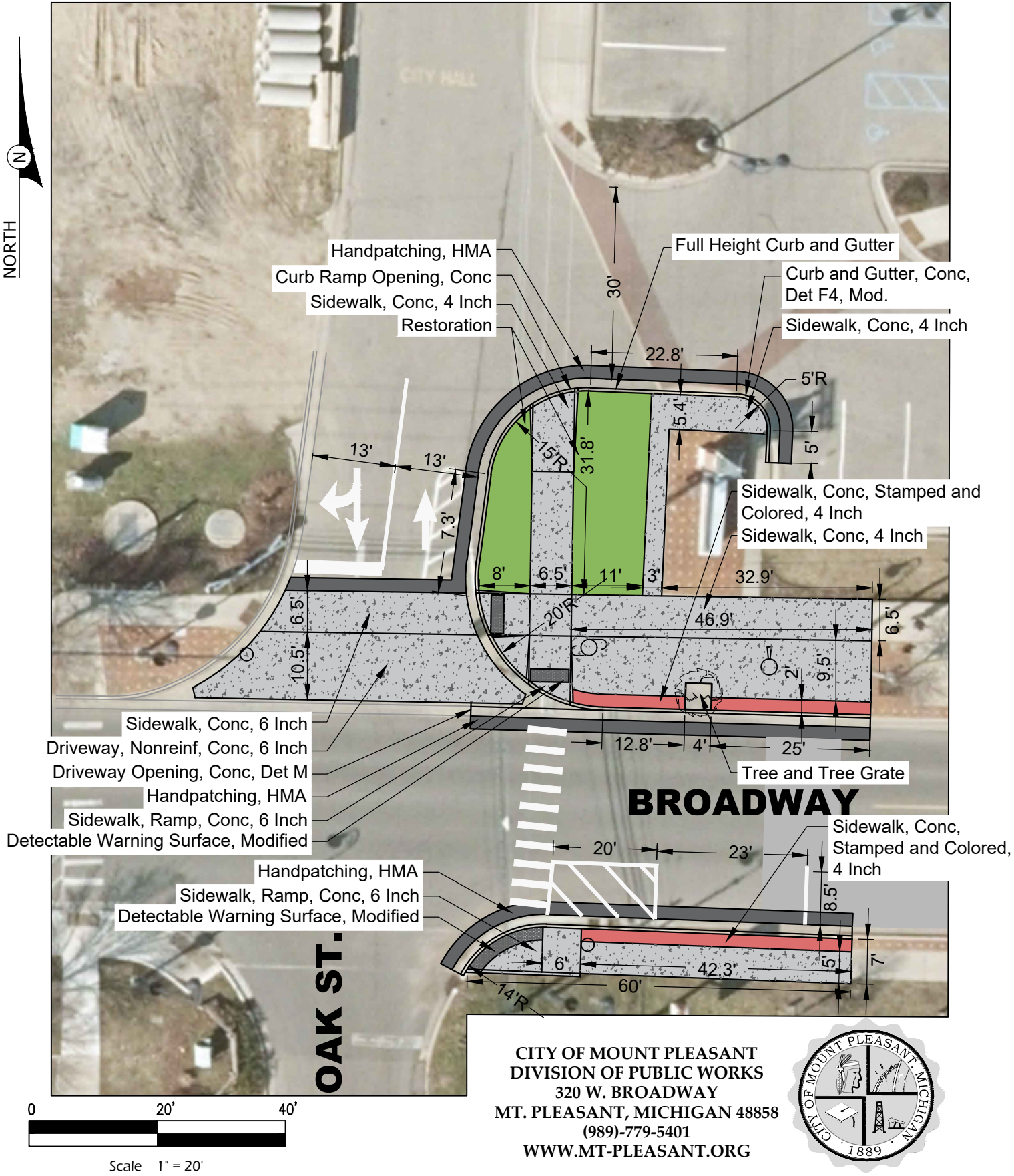




EXISTING SITE & REMOVAL PLAN  
CITY HALL DRIVEWAY



PROPOSED SITE PLAN  
CITY HALL DRIVEWAY





# Memorandum



TO: Aaron Desentz, City Manager

FROM: Jason Moore, DPW Director

DATE: February 12, 2025

SUBJECT: Award Contract for the 2025 Lime Residuals Removal Bid

## Request

The City Commission is requested to award the 2025 Lime Residuals Removal contract to MAK Enterprises, of Mt. Pleasant, at \$28.00 per cubic yard, and a not-to-exceed contract amount of \$429,000.

## Reason

The water treatment plant softens well water using a lime/caustic softening process, which generates spent lime residuals. These residuals are stored in one of two storage lagoons and are periodically removed for various applications, most commonly as an agricultural soil conditioner.

Bids were solicited for the removal of approximately 5,000 to 20,000 cubic yards of residuals, with an anticipated removal of 15,000 cubic yards this year. The following bids were received on February 11, 2025.

<u>Bidder</u>	<u>Price/CYD 15,000CYDS</u>	<u>Total Bid</u>
MAK Enterprises, LLC, Mt. Pleasant, MI	\$28.00	\$420,000
Prolime Corporation, Washington, MI	\$29.00	\$435,000
Rocky Ridge Development, Toledo, OH	\$31.95	\$479,250
Robbin Harsh Excavating, Clare, MI	\$32.00	\$480,000

MAK Enterprises is the low bidder. Their bid matches last year's pricing.

## Recommendation

I recommend the City Commission award the 2025 Lime Residuals Removal contract to MAK Enterprises for \$28.00 per cubic yard and a not-to-exceed contract amount of \$429,000. Funds are available in the Water Reserve Fund.

# Memorandum



TO: Aaron Desentz, City Manager

FROM: Stacie Tewari, City Engineer

DATE: February 12, 2025

SUBJECT: Award Contract for 2025 Pavement Marking Bid and Approve Budget Amendment

## Request:

The City Commission is requested to award the contract for the 2025 Pavement Marking Project to M & M Pavement Marking, Inc. of Grand Blanc, Michigan for \$42,736.

## Reason:

The bid specifications include application of pavement marking on local streets and major streets. These markings include crosswalks, stop bars, edge striping, railroad crossings, shared lanes, bike lanes on designated streets and stop bars and crosswalks at designated intersections. Attached to this memo is a map that indicates the streets and intersections, to be marked.

On February 11, 2025 the following bids were received:

Contractor	Local Streets	Major Streets	Sunnyside Park	Total Bid
M & M Pavement Marking, Grand Blanc, MI	\$6,698.90	\$32,144.74	\$3,892.00	\$42,735.64
P & K Contracting, Troy, MI	\$5,980.00	\$33,366.72	\$7,322.55	\$46,669.27

## Current Budget:

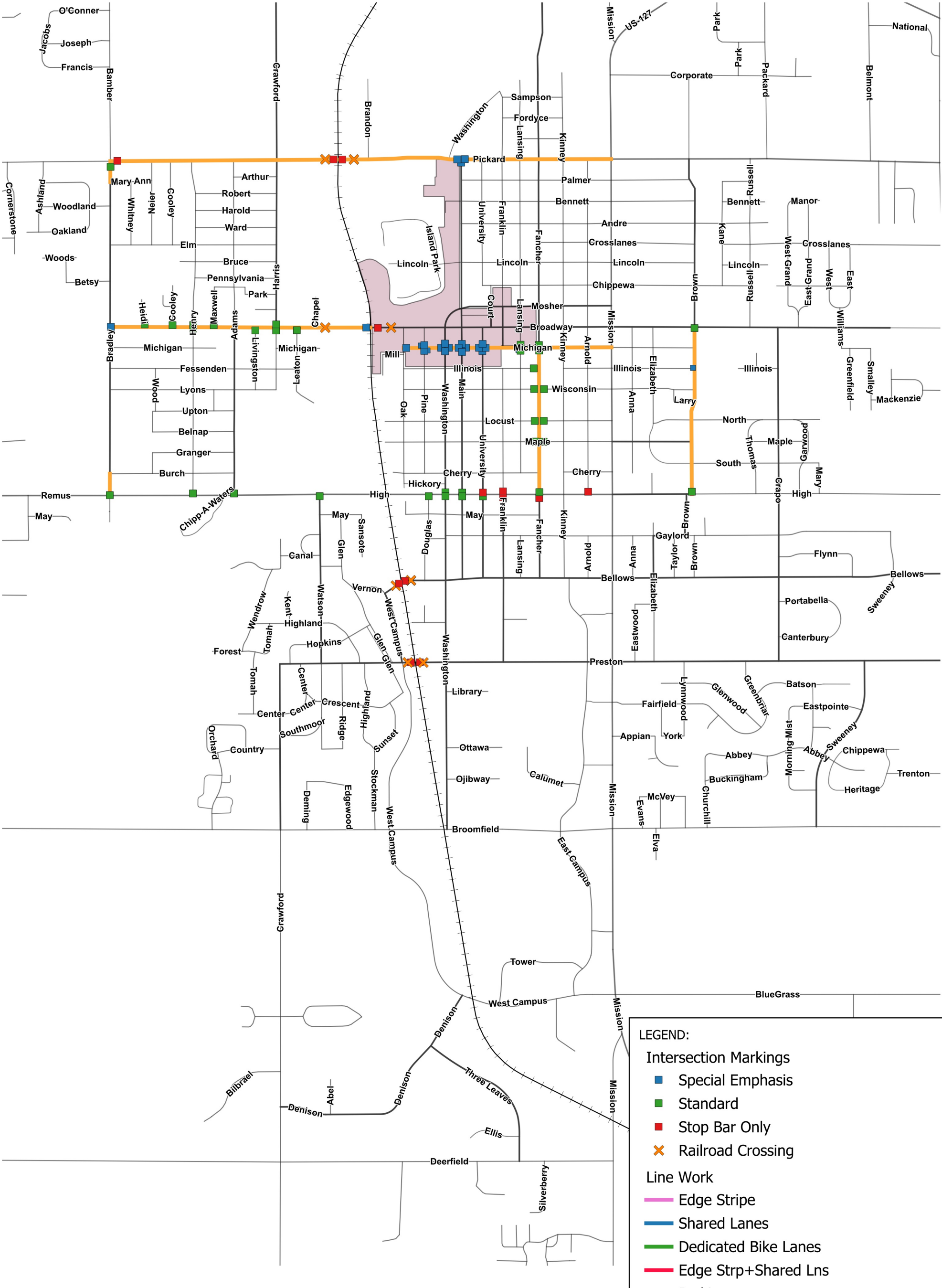
Local Streets	\$4,500.00
Major Streets	\$33,000.00
Sunnyside Park	\$4,000.00
Total	\$41,500.00

## Recommendation:

I recommend award of the 2025 Pavement Marking bid to M & M Pavement Marking for \$42,736, and approval of a budget amendment of \$2,200.00 for Local Streets. Funds are available in the 2025 Major Street, Local Streets and Parks budgets.

# 2025 Pavement Marking

City of Mt.Pleasant



LEGEND:

Intersection Markings

- Special Emphasis
- Standard
- Stop Bar Only
- Railroad Crossing

Line Work

- Edge Stripe
- Shared Lanes
- Dedicated Bike Lanes
- Edge Strp+Shared Lns
- Parking
- Standard CL
- SE Crossing
- Standard CL + Edge Stripe
- Downtown Boundary



Public Works *Mt. Pleasant*  
Engineering [meet here]

City of Mt. Pleasant - 320 West Broadway - Mt. Pleasant, MI 48858 - [www.mt-pleasant.org](http://www.mt-pleasant.org)



# Memorandum



TO: Aaron Desentz, City Manager

FROM: Jason Moore, DPW Director

DATE: February 4, 2025

SUBJECT: Approve Amendment to Engineering Services Agreement with Mead and Hunt

## Request

The City Commission is requested to approve an amendment to the professional services agreement with Mead and Hunt to include procurement of a wheel loader for the Mt. Pleasant Regional Airport, and authorize the city manager to sign the amendment.

## Reason

In November 2024, the City Commission approved a professional engineering services agreement with Mead and Hunt for \$18,409 for the procurement of a tractor-mounted snow blower for use at the airport. The original agreement included development of specifications and bidding documents for the acquisition of a snow blower attachment for the airport's existing tractor. However, due to the limited loading capacity of the tractor, the snow blower cannot be operated safely due to the tractor's insufficient full turn tipping load capacity. Tipping load capacity is the maximum weight a machine can carry without tipping over.

The purpose of the contract amendment is to add the development of specifications required to add a wheel loader to the existing bid documents for the snow blower. Wheel loaders have a higher carrying capacity than tractors.

As a reminder, in order to purchase the snow blower and added wheel loader with Bipartisan Infrastructure Law (BIL) funds in 2025, we must submit a bid to the Federal Aviation Administration by March 1, 2025. It is crucial to approve this contract amendment so that Mead and Hunt can begin work immediately.

The additional cost for this work is \$8,810, for total contract cost of \$27,219. Reimbursement will occur upon purchase of the equipment with 2025 BIL funds, which covers 90% of the contract cost, with the remaining 10% split between the state and city. The city's net contract cost will be \$1,361.

## Recommendation

I recommend the City Commission approve an amendment to the professional engineering services agreement with Mead and Hunt for \$8,810 to include procurement of a wheel loader for the Mt. Pleasant Regional Airport, and authorize the city manager to sign the amendment.

# **Amendment #1**

**Between**

**MEAD & HUNT, INC.**

**and**

**CITY OF MOUNT PLEASANT**

---

**ACQUIRE SRE – CARRIER VEHICLE (LOADER)**

**At the**

**Mt. Pleasant Municipal Airport**

**Mt. Pleasant, Michigan**

**Mead & Hunt Project No.:4069200-243134.01**

Original Agreement Dated:12/02/2024

Original Description: Design for Acquire Snow Removal Equipment

## **Purpose of Amendment**

The original agreement included development of specifications and bidding documents for the acquisition of a new tractor mounted self-powered rotary plow to be utilized with the Airport's existing TVC 145 New Holland Tractor. However, due to the limited loading capacity of the existing tractor, a self-powered rotary plow cannot be safely operated by the existing tractor, primarily due to the insufficient full turn tipping load capacity.

The purpose of this amendment is to add the development of specifications required for a new carrier vehicle (front wheel loaded) to the existing bidding documents for the self-powered rotary plow.

## **Scope of Services**

The SPONSOR desires to include a new carrier vehicle (loaders) in the bidding documents for a self-powered rotary plow. The CONSULTANT shall provide services to include performance specifications and bid proposal documents to meet procurement guidelines associated with the Federal Aviation Administration (FAA) Airport Improvement Program (AIP). Equipment shall meet the requirements and specifications associated with FAA AC 150/5220-20A Airport Snow and Ice Control Equipment and FAA AC 150/5200-30D Airport Field Condition Assessments and Winter Operations Safety

Prior to completion, the CONSULTANT will develop technical specifications and bidding documents for the carrier vehicle to a 90% level and combine them with the previously developed self-powered loader mounted rotary plow documents. The CONSULTANT will participate in a review meeting with the SPONSOR and MDOT. The SPONSOR shall review the performance specifications to be sure that they meet the airport's requirements. Comments received regarding the performance specifications shall be incorporated by the CONSULTANT into final documents.

Bidding services are included in the previous agreement and will be complete in accordance with that agreement.

## **Compensation**

The CONSULTANT shall be compensated a lump sum amount for the services identified in the scope of services. The amount of compensation shall be eight thousand eight hundred nine and 40/100 (\$8,809.40) dollars. A detailed breakdown of these costs is included in Attachment A. The CONSULTANT shall bill the SPONSOR in accordance with the terms and condition of the original agreement.

All other terms and conditions of the original base agreement shall remain in full force and effect.

This amendment and its conditions along with the conditions and requirements of the original agreement are hereby accepted by both parties as witnessed by these signatures:

WITNESS:

\_\_\_\_\_

**CITY OF MOUNT PLEASANT**

By: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

WITNESS:

  
\_\_\_\_\_  
Martha Frary

**MEAD & HUNT, INC.**

By:  \_\_\_\_\_

Name: Robert Leisenring

Title: Vice President

Date: January 31, 2025

# DESIGN SERVICES FEE ESTIMATE - ATTACHMENT A

## SUMMARY SHEET

Airport: Mt. Pleasant Municipal Airport  
 Project Description: Acquire SRE-Carrier Vehicle (Loader)  
 M & H Project No.: 4069200-243134.01  
 90 Calendar days in contract

MEAD & HUNT PROJECT COST BY ELEMENT						
	Direct Labor	Overhead 1.8672	Fixed Fee 11.0%	Total Labor Fee	Direct Costs	Total*
ELEMENT 1.11 - PRE DESIGN CONFERENCE	\$184.00	\$343.56	\$58.03	\$585.59	\$0.00	\$585.59
ELEMENT 1.12 - ENGINEERING SURVEY	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
ELEMENT 1.13 - DETAILED CONSTRUCTION PLANS AND SPECIFICATIONS	\$2,048.00	\$3,824.03	\$645.92	\$6,517.95	\$0.00	\$6,517.95
ELEMENT 1.14 - ESTIMATE OF PROBABLE CONSTRUCTION COST	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
ELEMENT 1.15 - ENGINEERING REPORT	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
ELEMENT 1.16 - USERS CONFERENCE	\$352.00	\$657.25	\$111.02	\$1,120.27	\$0.00	\$1,120.27
ELEMENT 1.18 - CONFERENCES AND MEETINGS	\$184.00	\$343.56	\$58.03	\$585.59	\$0.00	\$585.59
M&H PROJECT COSTS*	\$2,768.00	\$5,168.40	\$873.00	\$8,809.40	\$0.00	\$8,809.40

\*excludes sub consultants

SUBCONSULTANTS	
TOTAL SUBCONSULTANTS	\$0.00

TOTAL PROJECT COSTS	
TOTAL MEAD & HUNT PROJECT COSTS	\$8,809.40
TOTAL SUBCONSULTANTS	\$0.00
TOTAL PROJECT COSTS	\$8,809.40



Airport: Mt. Pleasant Municipal Airport  
Project Description: Acquire SRE-Carrier Vehicle (Loader)  
M & H Project No.: 4069200-243134.01

Employee Classification	SR PROJECT ENGINEER	PROJECT ENGINEER	SENIOR ENGINEER	ENGINEER 2	ENGINEER TECH 4	ENGINEER TECH 2	CLERICAL -	PROJECT PLANNER	
	Hourly Rate	\$79.00	\$64.00	\$56.00	\$46.00	\$47.00	\$37.00	\$28.00	\$64.00
ELEMENT 1.11 - PRE DESIGN CONFERENCE									
Pre design conference call		1	1						
SRE Justification with MDOT		1							
TOTAL HOURS	0	2	1	0	0	0	0	0	
No. of trips at 100 miles/trip									
Meals (days)									
Nights Lodging									
Direct Costs					Labor Costs				
Mileage this element ( \$0.655 /mile)	\$0.00				Total Direct Labor this element			\$184.00	
Meals this element(\$50/day)	\$0.00				Overhead this element			\$343.56	
Meals this element(\$17/trip)	\$0.00				Fixed Fee this element			\$58.03	
Lodging (\$130/night)	\$0.00				TOTAL LABOR FEE THIS ELEMENT			\$585.59	
Materials									
TOTAL DIRECT COSTS THIS ELEMENT		\$0.00				TOTAL COSTS THIS ELEMENT			\$585.59
ELEMENT 1.12 - ENGINEERING SURVEY									
TOTAL HOURS	0	0	0	0	0	0	0	0	
No. of trips at 100 miles/trip									
Meals (days)									
Nights Lodging									
Direct Costs					Labor Costs				
Mileage this element ( \$0.655 /mile)	\$0.00				Total Direct Labor this element			\$0.00	
Meals this element(\$50/day)	\$0.00				Overhead this element			\$0.00	
Meals this element(\$17/trip)	\$0.00				Fixed Fee this element			\$0.00	
Lodging (\$130/night)	\$0.00				TOTAL LABOR FEE THIS ELEMENT			\$0.00	
Materials									
TOTAL DIRECT COSTS THIS ELEMENT		\$0.00				TOTAL COSTS THIS ELEMENT			\$0.00

Airport: Mt. Pleasant Municipal Airport  
Project Description: Acquire SRE-Carrier Vehicle (Loader)  
M & H Project No.: 4069200-243134.01

Employee Classification	SR PROJECT ENGINEER	PROJECT ENGINEER	SENIOR ENGINEER	ENGINEER 2	ENGINEER TECH 4	ENGINEER TECH 2	CLERICAL	PROJECT PLANNER
ELEMENT 1.13 - DETAILED CONSTRUCTION PLANS AND SPECIFICATIONS								
Develop Specification			32					
Combine with existitng Bid Documents		4						
Local letting proposal/bid letting/recc to award								
TOTAL HOURS	0	4	32	0	0	0	0	0
Direct Costs					Labor Costs			
	Total Direct Labor this element				\$2,048.00			
	Overhead this element				\$3,824.03			
Materials	Fixed Fee this element				\$645.92			
	TOTAL LABOR FEE THIS ELEMENT				\$6,517.95			
TOTAL DIRECT COSTS THIS ELEMENT	\$0.00				TOTAL COSTS THIS ELEMENT			
ELEMENT 1.14 - ESTIMATE OF PROBABLE CONSTRUCTION COST								
TOTAL HOURS	0	0	0	0	0	0	0	0
Direct Costs					Labor Costs			
	Total Direct Labor this element				\$0.00			
	Overhead this element				\$0.00			
Materials	Fixed Fee this element				\$0.00			
	TOTAL LABOR FEE THIS ELEMENT				\$0.00			
TOTAL DIRECT COSTS THIS ELEMENT	\$0.00				TOTAL COSTS THIS ELEMENT			

Airport: Mt. Pleasant Municipal Airport  
Project Description: Acquire SRE-Carrier Vehicle (Loader)  
M & H Project No.: 4069200-243134.01

Employee Classification	SR PROJECT ENGINEER	PROJECT ENGINEER	SENIOR ENGINEER	ENGINEER 2	ENGINEER TECH 4	ENGINEER TECH 2	CLERICAL	PROJECT PLANNER
ELEMENT 1.15 - ENGINEERING REPORT								
TOTAL HOURS	0	0	0	0	0	0	0	0
Direct Costs					Labor Costs			
					Total Direct Labor this element		\$0.00	
Materials					Overhead this element		\$0.00	
					Fixed Fee this element		\$0.00	
					TOTAL LABOR FEE THIS ELEMENT		\$0.00	
TOTAL DIRECT COSTS THIS ELEMENT		\$0.00				TOTAL COSTS THIS ELEMENT		\$0.00
ELEMENT 1.16 - USERS CONFERENCE								
90% Review Meeting & Document Revisions		2	4					
TOTAL HOURS	0	2	4	0	0	0	0	0
No. of trips at 100 miles/trip								
Meals (days)								
Lodging (\$130/night)								
Direct Costs					Labor Costs			
Mileage this element ( \$0.655 /mile)					\$0.00	Total Direct Labor this element		\$352.00
Meals this element(\$50/day)					\$0.00	Overhead this element		\$657.25
Meals this element(\$17/trip)					\$0.00	Fixed Fee this element		\$111.02
Lodging (\$130/night)					\$0.00	TOTAL LABOR FEE THIS ELEMENT		\$1,120.27
Materials								
TOTAL DIRECT COSTS THIS ELEMENT		\$0.00				TOTAL COSTS THIS ELEMENT		\$1,120.27

Airport: Mt. Pleasant Municipal Airport  
Project Description: Acquire SRE-Carrier Vehicle (Loader)  
M & H Project No.: 4069200-243134.01

Employee Classification	SR PROJECT ENGINEER	PROJECT ENGINEER	SENIOR ENGINEER	ENGINEER 2	ENGINEER TECH 4	ENGINEER TECH 2	CLERICAL	PROJECT PLANNER
<b>ELEMENT 1.18 - CONFERENCES AND MEETINGS</b>								
Coordination with Sponsor		1						
Coordination with MDOT		1						
							2	
TOTAL HOURS	0	2	0	0	0	0	2	0
No. of trips at 100 miles/trip								
Meals (days)								
Lodging (\$130/night)								
<b>Direct Costs</b>					<b>Labor Costs</b>			
Mileage this element ( \$0.655 /mile)	\$0.00				Total Direct Labor this element			\$184.00
Meals this element(\$50/day)	\$0.00				Overhead this element			\$343.56
Meals this element(\$17/trip)	\$0.00				Fixed Fee this element			\$58.03
Lodging (\$130/night)	\$0.00				<b>TOTAL LABOR FEE THIS ELEMENT</b>			<b>\$585.59</b>
Materials								
<b>TOTAL DIRECT COSTS THIS ELEMENT</b>	<b>\$0.00</b>				<b>TOTAL COSTS THIS ELEMENT</b>			<b>\$585.59</b>

# Memorandum



TO: Aaron Desentz, City Manager

FROM: Jason Moore, DPW Director

DATE: February 10, 2025

SUBJECT: Approve Dumpster Service Contracts for City Buildings and Parks

## Request

The City Commission is requested to approve dumpster service contracts for city buildings and parks as recommended.

## Reason

The upcoming expiration of the dumpster service contract in May 2025 for Chipp-A-Waters, Nelson and Island Park prompted staff to review the annual dumpster service expenses for the parks, DPS and Street Department buildings. Below is a summary of the current service and average monthly cost last year.

Site	Dumpster Size	Current Hauler	Service Frequency	2024 Avg. Monthly Cost
DPS	6 yd.	Republic	1x week	\$704.97
Street	6 yd.	Republic	1x week	\$447.71
Chipp-A-Waters	6 yd.	WM	3x/week (May-Oct only)	\$451.02
Island Park	6 yd.	WM	3x week	\$487.45
Nelson Park	6 yd.	WM	3x week	\$487.45

To identify a more cost-effective provider, staff obtained quotes from Granger, Republic and King's Disposal. Pricing varies depending on dumpster size and service frequency.

	Dumpster Size	Service Frequency	Base Rate/mo.	Admin Fee	Mo. Fuel Fee	Other Fees	Dumpster Delivery Fee
Granger	6 yd.	1x week	\$132.00	None	5%	5% annual rate adjustment	No charge
	6 yd.	3x week	\$389.00	None	5%	Same as above	No charge
	8 yd.	1x week	\$155.00	None	5%	Same as above	No charge
	8 yd.	3x week	\$520.00	None	5%	Same as above	No charge
Republic	6 yd.	1x week	\$132.75	\$5.95	\$54.00	n/a	Existing dumpster
	6 yd.	3x week	\$300.00	\$5.95	\$118.65	n/a	Existing dumpster
	8 yd.	1x week	\$150.00	\$5.95	\$60.00	n/a	\$200+ ea.
	8 yd.	3x week	\$312.75	\$5.95	\$123.59	n/a	
King's	6 yd. only	1x week	\$145.00	None	None	None	None

Republic's quoted monthly fuel fees are estimated. Both Republic and Granger determine fuel fees by applying specific percentage rates to the U.S. Department of Energy's monthly average price for Midwest diesel fuel. They then multiply the resulting amount by the number of times the dumpster is serviced in a given

period. In 2024, the fuel fees significantly increased the monthly cost, though the exact amount varied due to fluctuating diesel prices.

After reviewing the quotes, staff recommends the following:

Parks: Granger, 6 yd. dumpsters serviced 3x weekly, \$389.00/mo.  
ea.  
DPS & Street: Granger, 8 yd. dumpsters serviced 1x week, \$155.00/mo. ea.

By transitioning to Granger, the city is expected to save approximately \$12,000 annually.

Granger requires a three-year contract for each site, subject to auto-renewal for an additional three years. We are seeking approval of an initial three-year contract only. Staff will obtain new quotes well ahead of the contract expiration dates.

#### Recommendation

I recommend the City Commission approve three-year dumpster service contracts with Granger for DPS, Streets, and the parks at the pricing listed above. Funds will be included in each department's respective years' operating budget.

02/20/2025

CHECK REGISTER FOR CITY OF MT PLEASANT  
CHECK DATE FROM 02/07/2025 - 02/20/2025

Check Date	Vendor Name	Description	Amount
Bank COMM COMMON CASH			
02/11/2025	CHRIS LEONARD	REIMB - TUITION JAN 2025	3,148.00
02/20/2025	CITY TREASURER - UTILITIES	CITY HALL WATER/SEWER DUE	2,506.95
02/20/2025	CONSUMERS ENERGY	UTILITIES DUE FEB 18 25	78,746.00
02/20/2025	WRIGHT EXPRESS FINANCIAL SERVICES	WEX MONTHLY PAYMENT	63,770.30
02/20/2025	AARON DESENTZ	REIMBURSEMENT -MGT 840 AND MGT 881 TUITI	4,520.00
02/20/2025	BILL BRICKNER	REIMBURSEMENT PHONE JAN 25	50.00
02/20/2025	TRAVIS WELSH	REIMBURSEMENT - PHONE	49.99
02/20/2025	TYLER LOOMIS	REIMBURSEMENT CELL PHONE JAN 25	50.00
02/20/2025	21ST CENTURY MEDIA - MICHIGAN	CONTRACT SVCS - 532009 - JAN 2025	2,753.00
02/20/2025	AIRGAS USA, LLC	SUPPLIES- STREETS	95.18
02/20/2025	ALEXANDER MATTHEWS	REIMBURSEMENT - PHONE JAN 2025	50.00
02/20/2025	ALMA BOLT COMPANY	SUPPLIES- STREETS	25.82
02/20/2025	AVFUEL CORPORATION	INVOICES/CREDITS THRU FEB 25	21,487.11
02/20/2025	AXON ENTERPRISE, INC.	SUPPLIES POLICE	42,396.74
02/20/2025	BLUE BAY CAPITAL	UB refund for account: 110-99520-01	60.68
02/20/2025	BLYSTONE & BAILEY	SERVICES THROUGH JAN 2025	2,313.65
02/20/2025	BRENDAN CARRICK	REIMBURSEMENT FOR PROTECTIVE FOOTWEAR	100.00
02/20/2025	BS&A SOFTWARE	ANNUAL SERVICE FEES FEB 25 TO FEB 26	18,677.00
02/20/2025	BURRIS EQUIPMENT	PUMP FOR WASTE WATER PLANT	17,995.00
02/20/2025	CABLE CONSORTIUM	VIDEO PRODUCTION FOR COMMISSIONS AND ZI	450.00
02/20/2025	CDW GOVERNMENT, INC	SUPPLIES POLICE DEPT	794.92
02/20/2025	CENTURYLINK	COMMUNICATIONS DUE MAR 3 2025	21.57
02/20/2025	CINTAS CORP	WRRF CLEANING SUPPLIES/FIRST AID	58.61
02/20/2025	CLAYTON MOLYNEUX	CONTRACT SVCS- K-2ND BASKETBALL THRU FEB	35.00
02/20/2025	COYNE OIL CORPORATION	FUEL FIRE DEPT JAN 25	4,160.87
02/20/2025	DETROIT PUMP & MFG CO - WARREN	SUPPLIES- WASTE WATER PLANT	3,231.56
02/20/2025	DINGES FIRE COMPANY	SUPPLIES-FIRE DEPT	758.04
02/20/2025	FISHBECK - ENGINEERS/ARCHITECTS/	WWRF IMPROVEMENTS	56,969.50
02/20/2025	FLEIS & VANDENBRINK	CONTRACT SVCS - JAN 2025	9,660.00
02/20/2025	FLEX ADMINISTRATORS	FSA ADMINISTRATIVE FEE JAN 25	193.20
02/20/2025	FRONT LINE SERVICES, INC	CONTRACT SVCS FIRE	2,243.74
02/20/2025	GRAYMONT WESTERN LIME INC.	SUPPLIES- WATER TREATMENT PLANT	9,529.42
02/20/2025	GREAT LAKES CENTRAL RAILROAD INC	CONTRACT SVCS - SIGNAL DEVICE MAINT 2025	8,256.07
02/20/2025	HAVILAND PRODUCTS COMPANY	CHEMICALS WRRF	8,060.00
02/20/2025	HYDROCORP, INC.	LABOR (RECURRING)	4,829.50
02/20/2025	INFOSEND, INC	MONTHLY SUPPORT FEE	478.58
02/20/2025	JAMIE FAIR	OVERPAYMENT-HOUSING LICENSE	12.00
02/20/2025	JANEL SHANER	METER READER MILEAGE REIMBURSEMENT	31.08
02/20/2025	JARED BOUMAN	REIMBURSEMENT CELL PHONE JAN 2025	50.00
02/20/2025	KAMDEN WILLIAMS	CONTRACT SVCS- K-2ND BASKETBALL THRU FEB	70.00
02/20/2025	KINGS DISPOSAL	CONTRACT SERVICES-TRASH JAN 25	95.00
02/20/2025	KOPY KORNER	BUSINESS CARDS - ALEX MATTHEWS	42.00
02/20/2025	KRAPOHL FORD LINCOLN MERC	SUPPLIES/VEHICLE MAINT - UNIT # 507	94.27
02/20/2025	LABRENZ PROPERTIES LLC	UB refund for account: 111-10000-88	94.05
02/20/2025	LAKESIDE EQUIPMENT CORPORATION	SUPPLIES- WASTE WATER PLANT	1,264.00
02/20/2025	LANNEN, JESSICA	UB refund for account: 103-70000-00	46.39
02/20/2025	LAURA BIGARD	CONTRACT SVCS- K-2ND BASKETBALL THRU FEB	60.00
02/20/2025	LILLY PIERCE	CONTRACT SVCS- K-2ND BASKETBALL THRU FEB	60.00
02/20/2025	MACALLISTER RENTALS	EQUIP RENTAL SNOW REMOVAL NOV TO FEB 25	5,877.86
02/20/2025	MANER COSTERISAN	SERVICES RELATED TO PREP AND SUB OF 1099	11,935.81
02/20/2025	MCLAREN CENTRAL MICHIGAN	NEW HIRE PHYSICAL AND DRUG SCREEN	88.00
02/20/2025	MEAD & HUNT	CONTRACT SVCS JAN 2025	6,804.00
02/20/2025	MELISSA WANINK	CONTRACT SVCS- K-2ND BASKETBALL THRU FEB	45.00
02/20/2025	MIDLAND DAILY NEWS	CONTRACT SVCS - 00058444 HR	703.92
02/20/2025	MP AREA CHAMBER OF COMMERCE	BASIC MEMBERSHIP	850.00
02/20/2025	MYMICHIGAN HEALTH	CONTRACT SVCS 700002727 HR NEW HIRE JANL	335.00
02/20/2025	NOLAN CASZATT	CONTRACT SVCS- K-2ND BASKETBALL THRU FEB	110.00

02/20/2025	O'NEIL & DUSO PLLC	PROSECUTORIAL SVCS RETAINER FEB 2025	7,941.70
02/20/2025	ODP BUSINESS SOLUTIONS LLC	SUPPLIES- PURCHASING FINANCE	88.98
02/20/2025	OMARI BOOKER	CONTRACT SVCS- K-2ND BASKETBALL THRU FEB	30.00
02/20/2025	PONTEM SOFTWARE	CONTRACT SVCS	26,415.00
02/20/2025	PRINTING SYSTEMS, INC	SUPPLIES- TAX FORMS	1,556.14
02/20/2025	PVS TECHNOLOGIES, INC	CHEMICALS WATER	9,538.85
02/20/2025	RCL CONSTRUCTION CO. INC	CONTRACT SVCS WRRF IMPROVEMENTS THRU 1	2,534,563.39
02/20/2025	RITE AID, SITE #04505-02	UB refund for account: 111-53535-01	110.23
02/20/2025	SARAH MARSHALL	REIMBURSEMENT - TRAINING - MWEA FEB 2025	115.80
02/20/2025	STATE OF MI DEPT OF TECH, MAN AND B	CONTRACT SVCS - ANNUAL PAYMENT	230.00
02/20/2025	STATE OF MICHIGAN	BASE CHARGE-AIRPORT	260.00
02/20/2025	STERICYCLE, INC.	PAPER SHREDDING AT CITY HALL	281.19
02/20/2025	SUNRISE ASSESSING SERVICES, LLC	ASSESSING SVCS MARCH 2025	8,575.00
02/20/2025	T.H. EIFERT, LLC	CONTRACT SVCS CITY HALL	536.00
02/20/2025	THOMAS HOHLBEIN	CONTRACT SVCS- K-2ND BASKETBALL THRU FEB	45.00
02/20/2025	UNIFIRST CORPORATION	MOTOR POOL MATS	240.56

COMM TOTALS:

Total of 92 Checks:	2,987,722.22
Less 19 Void Checks:	0.00
Total of 73 Disbursements:	2,987,722.22

Bank TAX TAX COLLECTION

02/20/2025	I-RIDE	CONTRACT SVCS - TAX DIST 2024	76,282.87
02/20/2025	ISABELLA COUNTY TREASURER	TAX DISTRIBUTION 2024	425,165.96
02/20/2025	MID MICHIGAN COMM COLLEGE	TAX DISTRIBUTION 2024	107,744.30
02/20/2025	MT. PLEASANT PUBLIC SCHOOLS	TAX DISTRIBUTION 2024	757,914.91
02/20/2025	STATE OF MICHIGAN	TAX DISTRIBUTION 2024	3,864.67

TAX TOTALS:

Total of 5 Checks:	1,370,972.71
Less 0 Void Checks:	0.00
Total of 5 Disbursements:	1,370,972.71

REPORT TOTALS:

Total of 97 Checks:	4,358,694.93
Less 19 Void Checks:	0.00
Total of 78 Disbursements:	4,358,694.93





## CITY OF MOUNT PLEASANT

### Application for Board or Commission Appointment

In accordance with the City Charter, Michigan Constitution, and U.S. Constitution, an individual must be a registered voter in the City of Mt. Pleasant. By submitting this application you affirm that you meet this requirement. Limited exceptions for certain boards exist as indicated on the attached listing. For a complete description of each board and commission please see attached listing.

***Applications will be kept on file for three calendar years.***

*Please note that all information submitted in this application is public information and subject to disclosure.*

Name:

Brooke Bradley

Date:\*

02-11-2025

Date



2

Hour



20

Minutes



PM



Residence:

811 Oakland Drive Mt. Pleasant Mi

Mailing Address (if different than above):

Telephone:

9893177935

Cell Phone:

9893177935

E-mail

bradleyb@cooley.edu

Please check all that apply:



I own property



I own a business located within the City of Mt. Pleasant



I rent property

Boards or Commissions in which you are interested. You may list more than one. Please list preferences in order. If your first choice is unavailable we may contact you for service on another board.

Mount Pleasant City Commission

Why are you interested in this particular board or boards?

I am interested in serving my community as a board member because, as a lifetime resident of Mt. Pleasant, I have the experience needed to bring this community together. I would like to give back to my community by helping develop policies that will move us forward together.

Please list any community service and/or prior board or commission service, including the name of the board and term of service.

I served as a member of the Indian Law Board from approximately 2014 to 2018. As part of this board, I helped develop policy and laws regarding the treatment of Native persons under Michigan Law. I also serve as a volunteer instructor and tournament coordinator for Mt. Pleasant Martial Arts. I have worked on a variety of local community service projects, including coordinating a book drive for local foster children and providing free and low-cost legal services to community members in need.

What experience or training do you have which might be of special value on this board or commission (i.e. education, job experience, length of residency, life in another community, etc.)?

I have a law degree from Cooley Law School and passed the bar exam in 2012. I have worked as a low-cost and public service attorney and have experience working with the courts, police, and the Tribe. I am also an alumnus of CMU and a parent of a student who attends Mid Michigan Community College. I have a good understanding of issues that college students face. I have experience in policymaking through my work on the Indian Law board. I also own a business where in addition to my public service work, I manage trust funds and prepare detailed financial reports. I have knowledge of accounting, math skills, and computer skills.

Please list three personal or business references, including contact information. (Please note if applying for the Principal Shopping District Board, one reference should be the name of business nominating/supporting your appointment.)

Tony Moses, Tribal Prosecutor and former public service attorney for Isabella County. 989-953-4304

Michael Hyde, Local Attorney. 1-989-621-0095

Master Ken McQueen, Master Instructor, Taekwondo. 989-289-6063

Based on the board you are applying for, please check the appropriate box or boxes to indicate whether you have the stated experience or professional expertise that may be needed to fill a specific skillset. Please note these are desired qualifications. Some boards and commissions are a mix of citizens with certain qualifications and others are citizens representing the general public. Even if you do not have the desired experience or expertise, you are urged to apply for consideration as the community is well served by citizens with diverse backgrounds.

Enter the message as it's shown\*



9-1-1 Central Dispatch Governing Board -Experience in emergency management response or social services needs.

☐

Emergency response

☐

County-wide coordination

Airport Advisory Board -Experience or knowledge in aviation businesses or pilot.

☐

Pilot

☐

Aviation businesses

☐ Federal Aviation Administration rules

Audit Committee-Accounting knowledge, particularly governmental accounting.

☐ Accounting

☐ Auditing

☐ Municipal Finance

Board of Review -Experience and/or training in matters related to real estate valuation.

☐ Banking/Finance

☐ Property Appraisal/Assessing

☐ Real Estate/Development/Law

Building Authority -Experience and/or training in matters related to real estate.

☐ Banking/Finance

☐ Property Appraisal/Assessing

☐ Real Estate/Development/Law  
(no agents or brokers)

Building, Fire, Housing and Sanitary Sewer Board of Appeals -Experience and/or training in matters relating to construction.

☐ Architecture

☐ Building Construction

☐ Engineering

Chippewa River District Library Board of Trustees -Experience with the management, supervision and oversight of library facilities.

☐ Policy making

☐ Advertising/Marketing/Public Relations

☐ Finance/Budget

☐ Knowledge of libraries

City Commission

☒ Policy making

☒ Finance/Budget

☒ Knowledge of government

City/CMU Student Liaison Committee -Experience with communication and problem solving.

☐ Higher education

☐ Neighborhood preservation

☐ Marketing and promotion

Cultural & Recreational Commission -Experience and/or training in recreation activities.

☐ Fitness/Recreation

☐ Physical Education

☐ Advertising/Marketing/Public Relations

Dog Park Advisory Board -Experience with policy making, implementation of policies, and conflict resolution. A love for dogs.

☐ Own a dog

☐ Policy making

☐ Conflict resolution

Downtown Development Authority (DDA) -Experience with business or methods to increase taxable value within the identified Mission/Pickard District.

☐ Banking/Finance

☐ New business development

☐ Marketing and promotion

☐ Business recruitment and retention

☐ Real estate development

Economic Development Corporation/ Brownfield Redevelopment Authority (EDC/BRA) -Experience with business or methods to increase taxable value within the City.

☐ Banking/Finance

☐ New business development

☐ Real estate development

☐ Business recruitment and retention

Fire & Police Pension Board -Experience in investments or financial planning.

☐ Investments

☐ Accounting/Finance

Historic District Commission -Interest or knowledge in historic preservation.

☐ Architecture

☐ Building  
Construction/Engineering

☐ Historic Preservation

Housing Commission -Experience and/or training in matters related to the housing industry, subsidized housing programs, or property management.

☐ Residential Real Estate

☐ Property Management/Leasing

☐ Building Construction

☐ Low Income or Subsidized Housing

☐ Housing Development/Law

Isabella County Material Recovery Facility Governing Board -Experience with recycling or industrial-type processing.

☐ Recycle markets

☐ Recycle practices

Isabella County Transportation Commission -Experience and/or training in matters related to transportation.

☐ Engineering

☐ Transportation

☐ Transit (bus) user

Local Officers Compensation Commission -Experience in elected local positions, volunteer, or compensation.

☐ Elected local official

☐ Finance/Budget

☐ Public Sector Compensation

Parks and Recreation Commission -Experience and/or training in recreation activities or parks management.

☐ Physical Education

☐ Advertising/Marketing/Public Relations

☐ Fitness/Recreation

☐ Landscape Architecture

Planning Commission -Experience in land use related issues.

☐ Building Construction

☐ Architecture/Landscape  
Architecture

☐ Land Use Planning

☐ Real Estate Development

Principal Shopping District Board

☐ Business recruitment, retention and expansion

☐ New business development

Tax Increment Finance Authority (TIFA) -Experience with business or methods to increase taxable value within the identified two districts (Downtown and Industrial Park North).

☐ New business development

☐ Business recruitment and retention

Zoning Board of Appeals -Interest or knowledge of land use related issues.

☐ Architecture

☐ Building Construction

☐ Land Use Planning

☐ Real Estate Development/Law

#### City of Mt. Pleasant

#### **NOTICE OF BOARD AND COMMISSION VACANCIES**

Applications are now being accepted for the following boards and commissions. Any qualified elector may submit his/her name or the name of another for consideration. An application is available for this purpose at the City Clerk's Office, and on the City's website at [www.mt-pleasant.org](http://www.mt-pleasant.org). Applications should be submitted online or to the City Clerk, 320 W. Broadway Street, Mt. Pleasant, MI 48858.

*City Charter limits service to four full consecutive terms. Most terms of appointment are for three years ending on December 31, staggered by year among the members.*

<b>9-1-1 Central Dispatch Governing Board</b> - Responsible for approval of Center policies, appointment and dismissal of Dispatch Center Director, and recommendation of annual operating budget.
<b>Audit Committee</b> (Terms expire June 30) - Nominate auditors; review scope of audit and results of auditor's examination.
<b>Board of Review</b> (Two-year terms) - Hear appeals on the assessment of real and personal property and determine assessments.
<b>Building Authority</b> (Six-year terms) - Issue revenue bonds to acquire, improve and/or enlarge parking or recreational facilities and equip the same.
<b>Building, Fire, Housing and Sanitary Sewer Board of Appeals</b> - Interpret provisions of the Michigan Building Code, International Fire Code, Sewer Use Ordinance and Housing Licensing Code, and hear appeals as provided by each code.
<b>Chippewa River District Library Board of Trustees</b> (Four-year term)- Provide citizen input concerning the policies, function, and future development of the library and its branches in Shepherd, Winn, Blanchard, and Rosebush.
<b>City/CMU Student Liaison Committee</b> - Serves as a vehicle for ongoing dialogue between students, residents, City officials and University officials. Responsible for offering recommendations and providing feedback on programs and/or activities to enhance the relationship between students and residents
<b>Cultural &amp; Recreational Commission</b> (Term expires April 30) - Working with appointees of other CRC-member governing bodies, develop cultural, educational, and recreational facilities and programs for youth, families, and senior citizens of Isabella County, and promote harmony between Native Americans and other community members.
<b>Dog Park Advisory Board</b> (Two-year terms) - Considers written complaints about use, operation, maintenance, and/or conditions of the Dog Park and provides written recommendation to the Mt. Pleasant Parks and Recreation Commission, Mt. Pleasant City Commission and Township Board for consideration. May also recommend procedural rules
<b>Downtown Development Authority (DDA)*</b> (Four-year terms) - Initiate projects and programs to halt property value deterioration and increase property tax valuation in designated districts.
<b>Economic Development Corporation/Brownfield Redevelopment Authority (EDC/BRA) *</b> (Six-year terms) - Initiate projects and programs to halt property value deterioration and increase property tax valuation in designated districts.
<b>Fire &amp; Police Pension Board</b> (Four-year terms) - Manage and operate the Mt. Pleasant Fire and Police Retirement System in accordance with Act 345, P.A. 1937.
<b>Historic District Commission</b> - Recommend to the City Commission appropriate historic district boundaries, review historic renovation plans, review Secretary of Interior guidelines for historic preservation of properties within an established district, and implement the provisions of Ordinance No. 913. Also, may advise on projects such as awards for renovations, historic guidelines, applications for revolving loan fund applications, review of variance requests on historic properties, and assistance with bronze art.
<b>Housing Commission</b> (Five-year terms expire July 18) - Establish policy for and operate low-income housing programs within the City. (Appointed by City Manager)
<b>Isabella County Material Recovery Facility Governing Board</b> (Two-year terms) - Develop MRF operating guidelines, selection and termination of the contracted service provider, and recommendation of the annual operating budget to the Isabella County Board of Commissioners.
<b>Isabella County Transportation Commission</b> - Formulate and implement policies and procedures for administration and operation of County-wide transportation system.
<b>Local Officers Compensation Commission</b> (7-year term) - Recommend to the City Commission the salary of each elected City Official.
<b>Parks and Recreation Commission</b> - Advise City Commission on leisure time needs of the community, plan for development of park facilities and recreation programs.
<b>Planning Commission</b> - Guide the physical development of the City; advise the City Commission on growth policy
<b>Principal Shopping District Board (PSD) *</b> (Four-year terms) - Oversee activities funded by special assessment for beautification type activities and snow clearing of parking lots and adjacent sidewalks.
<b>Tax Increment Finance Authority (TIFA) *</b> (Four-year terms) - Initiate projects and programs to halt property value deterioration, increase property tax valuation and enhance economic activity in designated districts.
<b>Zoning Board of Appeals</b> - Hear appeals on decisions regarding enforcement of the Zoning Ordinance.

\* Some seats allow business interest as a requirement instead of voting registration.

Submit



Print Form





## CITY OF MOUNT PLEASANT

### Application for Board or Commission Appointment

In accordance with the City Charter, Michigan Constitution, and U.S. Constitution, an individual must be a registered voter in the City of Mt. Pleasant. By submitting this application you affirm that you meet this requirement. Limited exceptions for certain boards exist as indicated on the attached listing. For a complete description of each board and commission please see attached listing.

***Applications will be kept on file for three calendar years.***

*Please note that all information submitted in this application is public information and subject to disclosure.*

Name:

Christopher McGlamery

Date:\*

01-30-2025

Date

9 20 PM  
Hour Minutes

Residence:

1102 Park St  
Mt. Pleasant, MI 48858

Mailing Address (if different than above):

Telephone:

Cell Phone:

616-232-8743

E-mail

cmcxy21@gmail.com

Please check all that apply:

- ☒ I own property
- ☐ I own a business located within the City of Mt. Pleasant
- ☐ I rent property

Boards or Commissions in which you are interested. You may list more than one. Please list preferences in order. If your first choice is unavailable we may contact you for service on another board.

## City Commission

Why are you interested in this particular board or boards?

I'm interested in joining the City Commission to make sure future policies put in place make sense for home owning residents of the City. As a home/property owner on the West Side of town since 2018, I bring with me that experience, and the knowledge of issues and concerns homeowners of the City have. My partner owns a small business in the City, so I am now able to bring that perspective with me as well. I am employed by the largest employer in the county, SCIT, and can offer view points of the many resident workers employed here.

Please list any community service and/or prior board or commission service, including the name of the board and term of service.

What experience or training do you have which might be of special value on this board or commission (i.e. education, job experience, length of residency, life in another community, etc.)?

Homeowner and resident since 2018

Employed by SCIT, as a Security Officer

Completed over 42 credit hours of college coursework in criminal Justice and law

Please list three personal or business references, including contact information. (Please note if applying for the Principal Shopping District Board, one reference should be the name of business nominating/supporting your appointment.)

Daniel Figgins (Former Co-worker)(Tribal Police Dispatcher)

(989) 802-9962

Deb Cook (Co-worker)(Security Officer)

(989) 560-1122

William Johnson (Co-worker)(Surveillance Monitor)

(989) 948-0750

Based on the board you are applying for, please check the appropriate box or boxes to indicate whether you have the stated experience or professional expertise that may be needed to fill a specific skillset. Please note these are desired qualifications. Some boards and commissions are a mix of citizens with certain qualifications and others are citizens representing the general public. Even if you do not have the desired experience or expertise, you are urged to apply for consideration as the community is well served by citizens with diverse backgrounds.

Enter the message as it's shown\*



muscle

9-1-1 Central Dispatch Governing Board -Experience in emergency management response or social services needs.

☐ Emergency response

☐ County-wide coordination

Airport Advisory Board -Experience or knowledge in aviation businesses or pilot.

☐ Pilot

☐ Aviation businesses

☐ Federal Aviation Administration rules

Audit Committee-Accounting knowledge, particularly governmental accounting.

- ☐ Accounting ☐ Auditing  
☐ Municipal Finance

Board of Review -Experience and/or training in matters related to real estate valuation.

- ☐ Banking/Finance ☐ Property Appraisal/Assessing  
☐ Real Estate/Development/Law

Building Authority -Experience and/or training in matters related to real estate.

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☐ Real Estate/Development/Law  
(no agents or brokers)

Building, Fire, Housing and Sanitary Sewer Board of Appeals -Experience and/or training in matters relating to construction.

- ☐ Architecture ☐ Building Construction  
☐ Engineering

Chippewa River District Library Board of Trustees -Experience with the management, supervision and oversight of library facilities.

- ☐ Policy making ☐ Advertising/Marketing/Public Relations  
☐ Finance/Budget ☐ Knowledge of libraries

City Commission

- ☐ Policy making ☐ Finance/Budget  
☒ Knowledge of government

City/CMU Student Liaison Committee -Experience with communication and problem solving.

- ☐ Higher education ☐ Neighborhood preservation  
☐ Marketing and promotion

Cultural & Recreational Commission -Experience and/or training in recreation activities.

- ☐ Fitness/Recreation ☐ Physical Education  
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Dog Park Advisory Board -Experience with policy making, implementation of policies, and conflict resolution. A love for dogs.

- ☐ Own a dog ☐ Policy making  
☐ Conflict resolution

Downtown Development Authority (DDA) -Experience with business or methods to increase taxable value within the identified Mission/Pickard District.

- ☐ Banking/Finance ☐ New business development  
☐ Marketing and promotion ☐ Business recruitment and retention  
☐ Real estate development

Economic Development Corporation/ Brownfield Redevelopment Authority (EDC/BRA) -Experience with business or methods to increase taxable value within the City.

- ☐ Banking/Finance ☐ New business development  
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Fire & Police Pension Board -Experience in investments or financial planning.

- ☐ Investments ☐ Accounting/Finance

Historic District Commission -Interest or knowledge in historic preservation.

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Planning Commission -Experience in land use related issues.

- ☐ Building Construction ☐ Architecture/Landscape  
Architecture
- ☐ Land Use Planning ☐ Real Estate Development

Principal Shopping District Board

- ☐ Business recruitment, retention and expansion ☐ New business development

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- ☐ New business development ☐ Business recruitment and retention

Zoning Board of Appeals -Interest or knowledge of land use related issues.

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## City of Mt. Pleasant

**NOTICE OF BOARD AND COMMISSION VACANCIES**

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<b>Fire &amp; Police Pension Board</b> (Four-year terms) - Manage and operate the Mt. Pleasant Fire and Police Retirement System in accordance with Act 345, P.A. 1937.
<b>Historic District Commission</b> - Recommend to the City Commission appropriate historic district boundaries, review historic renovation plans, review Secretary of Interior guidelines for historic preservation of properties within an established district, and implement the provisions of Ordinance No. 913. Also, may advise on projects such as awards for renovations, historic guidelines, applications for revolving loan fund applications, review of variance requests on historic properties, and assistance with bronze art.
<b>Housing Commission</b> (Five-year terms expire July 18) - Establish policy for and operate low-income housing programs within the City. (Appointed by City Manager)
<b>Isabella County Material Recovery Facility Governing Board</b> (Two-year terms) - Develop MRF operating guidelines, selection and termination of the contracted service provider, and recommendation of the annual operating budget to the Isabella County Board of Commissioners.
<b>Isabella County Transportation Commission</b> - Formulate and implement policies and procedures for administration and operation of County-wide transportation system.
<b>Local Officers Compensation Commission</b> (7-year term) - Recommend to the City Commission the salary of each elected City Official.
<b>Parks and Recreation Commission</b> - Advise City Commission on leisure time needs of the community, plan for development of park facilities and recreation programs.
<b>Planning Commission</b> - Guide the physical development of the City; advise the City Commission on growth policy.
<b>Principal Shopping District Board (PSD)*</b> (Four-year terms) - Oversee activities funded by special assessment for beautification type activities and snow clearing of parking lots and adjacent sidewalks.
<b>Tax Increment Finance Authority (TIFA)*</b> (Four-year terms) - Initiate projects and programs to halt property value deterioration, increase property tax valuation and enhance economic activity in designated districts.
<b>Zoning Board of Appeals</b> - Hear appeals on decisions regarding enforcement of the Zoning Ordinance.

\* Some seats allow business interest as a requirement instead of voting registration.



Tuesday, February 11, 2025

## CITY OF MOUNT PLEASANT

### Application for Board or Commission Appointment

In accordance with the City Charter, Michigan Constitution, and U.S. Constitution, an individual must be a registered voter in the City of Mt. Pleasant. By submitting this application you affirm that you meet this requirement. Limited exceptions for certain boards exist as indicated on the attached listing. For a complete description of each board and commission please see attached listing. **Applications will be kept on file for three calendar years.**

*Please note that all information submitted in this application is public information and subject to disclosure.*

**Name:** Glen P Irwin II

**Date:** Tuesday, February 11, 2025 13:40

**Residence:**

1018 Sweeney St. Unit C.  
Mt. Pleasant Mi.  
48858

**Mailing Address (if different than above):**

Same as above.

**Telephone:** 989-773-3143

**Cell Phone:** 989-560-6708

**E-mail** redironrules@yahoo.com

**Please check all that apply:**

I own property

I own a business located within the City of Mt. Pleasant

**Boards or Commissions in which you are interested. You may list more than one. Please list preferences in order. If your first choice is unavailable we may contact you for service on another board.**

City Commission.

**Why are you interested in this particular board or boards?**

I had a seat on the Airport Advisory board for a long time and I am currently on the Planning Commission and a representative to the Mission Corridor Steering Committee. I feel that I am ready to step up to the



City Commission so I can be of more value to the City in a position of higher responsibility.

Isabella County has the highest poverty rate of all the counties in Michigan. As the focal point of Isabella County, the City of Mt. Pleasant needs to lead the way upward. We need to be more aggressive in finding solutions and working with CMU to reverse the trend of population and income decline. I want to be a part of improving the quality of our community.

**Please list any community service and/or prior board or commission service, including the name of the board and term of service.**

Airport Advisory Board from 2013-2021. Was chairman of that board during my last term.

City of Mt. Pleasant Planning Commission 2015-to present.

For many years I served on one board and one commission concurrently.

**What experience or training do you have which might be of special value on this board or commission (i.e. education, job experience, length of residency, life in another community, etc.)?**

I have lived in Mt. pleasant since the early 1980's. During that time I graduated from CMU with a degree in Biology with a chemistry minor. I worked for two different environmental firms in town, my family business at a hardware store, an electrical supply warehouse, and I now operate my own LLC which owns and operates commercial properties in Mt. Pleasant. I am also the Treasurer of Rosewood East 8 Condominium association.

**Please list three personal or business references, including contact information. (Please note if applying for the Principal Shopping District Board, one reference should be the name of business nominating/supporting your appointment.)**

Paul Lauria - Director of Public Safety/Chief of Police for the City of Mt. Pleasant Mi. 989-330-4378

Jennifer Verleger - Superintendent of Mt. Pleasant Public Schools. 989-621-1802

Donald Tomalia PhD in physical organic chemistry- Founder and operator of NanoSynthos LLC - a dendrimer research facility at 1200 N. Fancher Mt. Pleasant Mi. 989-317-3737

Based on the board you are applying for, please check the appropriate box or boxes to indicate whether you have the stated experience or professional expertise that may be needed to fill a specific skillset. Please note these are desired qualifications. Some boards and commissions are a mix of citizens with certain qualifications and others are citizens representing the general public. Even if you do not have the desired experience or expertise, you are urged to apply for consideration as the community is well served by citizens with diverse backgrounds.

**City Commission**

Policy making	Finance/Budget
Knowledge of government	

List of the Pages	
TABLE OF CONTENTS	
1	Introduction
2	1.1 General description of the project
3	1.2 Objectives and scope of the project
4	1.3 Organization of the project
5	2. Literature review
6	2.1 General description of the literature
7	2.2 Objectives and scope of the literature
8	2.3 Organization of the literature
9	3. Methodology
10	3.1 General description of the methodology
11	3.2 Objectives and scope of the methodology
12	3.3 Organization of the methodology
13	4. Results
14	4.1 General description of the results
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16	4.3 Organization of the results
17	5. Discussion
18	5.1 General description of the discussion
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39	10.2 Objectives and scope of the index
40	10.3 Organization of the index



Saturday, February 1, 2025

## CITY OF MOUNT PLEASANT

### Application for Board or Commission Appointment

In accordance with the City Charter, Michigan Constitution, and U.S. Constitution, an individual must be a registered voter in the City of Mt. Pleasant. By submitting this application you affirm that you meet this requirement. Limited exceptions for certain boards exist as indicated on the attached listing. For a complete description of each board and commission please see attached listing. ***Applications will be kept on file for three calendar years.***

*Please note that all information submitted in this application is public information and subject to disclosure.*

**Name:** Hunter Burlett

**Date:** Friday, January 31, 2025 19:00

**Residence:**  
1105 Bruce St.  
Mount Pleasant, MI 48858

**Telephone:** 989-817-8154

**Cell Phone:** 989-817-8154

**E-mail** huntersebastianburlett@gmail.com

**Boards or Commissions in which you are interested. You may list more than one. Please list preferences in order. If your first choice is unavailable we may contact you for service on another board.**

City Commissioner

**Why are you interested in this particular board or boards?**

I want to be a part of helping our city become more efficient, more strategic, more transparent, and more involved.

**Please list any community service and/or prior board or commission service, including the name of the board and term of service.**

Human Rights Committee at large member 2022 to present  
Phi Theta Kappa member- current

**What experience or training do you have which might be of special value on this board or commission (i.e. education, job experience, length of residency, life in another community, etc.)?**

Currently work for the county transportation.  
Earning an associate's degree from Mid Michigan College in administrative assistant with a focus on paralegal.  
Transferring to Central Michigan University after completion at Mid Michigan College in order to obtain my bachelor's degree in Political Science with several minors including non-profit and public sectors, criminal justice, diversity, and international.

**Please list three personal or business references, including contact information. (Please note if applying for the Principal Shopping District Board, one reference should be the name of business nominating/supporting your appointment.)**

Amber Meade- 989-772-9441. Transportation Coordinator at Isabella County Transportation Commission  
Ashley Burlett- 989-817-1765. Call center operator at I-Ride (Isabella County Transportation Commission), as well as a previous boss at Advanced Inventory Solutions.  
Kelly Crofoot- 989-772-9441. Human Resources Manger at I-Ride (Isabella County Transportation Commission).

Based on the board you are applying for, please check the appropriate box or boxes to indicate whether you have the stated experience or professional expertise that may be needed to fill a specific skillset. Please note these are desired qualifications. Some boards and commissions are a mix of citizens with certain qualifications and others are citizens representing the general public. Even if you do not have the desired experience or expertise, you are urged to apply for consideration as the community is well served by citizens with diverse backgrounds.

A small, low-resolution image of a form, likely a checklist or application form, with multiple rows of text and checkboxes. The text is too small to read, but the layout suggests a series of questions or categories to be marked as 'Yes' or 'No'.



Wednesday, February 12, 2025

## CITY OF MOUNT PLEASANT

### Application for Board or Commission Appointment

In accordance with the City Charter, Michigan Constitution, and U.S. Constitution, an individual must be a registered voter in the City of Mt. Pleasant. By submitting this application you affirm that you meet this requirement. Limited exceptions for certain boards exist as indicated on the attached listing. For a complete description of each board and commission please see attached listing. **Applications will be kept on file for three calendar years.**

*Please note that all information submitted in this application is public information and subject to disclosure.*

**Name:** John Zang

**Date:** Wednesday, February 12, 2025 15:20

**Residence:**  
623 Hopkins Ave  
Mount Pleasant, MI 48858

**Cell Phone:** 810-841-1288

**E-mail** zang810@sbglobal.net

**Please check all that apply:** ☒ I own property

**Boards or Commissions in which you are interested. You may list more than one. Please list preferences in order. If your first choice is unavailable we may contact you for service on another board.**

City Commission

### **Why are you interested in this particular board or boards?**

I want to help the City I live in. I am highly qualified and have the knowledge and experience of city functions and operations with the ability to have immediate positive impact when working with other City Commissioners

### **Please list any community service and/or prior board or commission service, including the name of the board and term of service.**

I have served on Mt Pleasant Airport Advisory Board, Isabella County Materials Recovery Facility Board, Isabella County Commission on Aging Advisory Board, In other places I've lived I served on Lexington Township Board of Review, Grand Haven Area Public Schools Board of Education (School Board), Scott County, VA., FFA advisory Board. I also served on Board of Directors for private corporations.

**What experience or training do you have which might be of special value on this board or commission (i.e. education, job experience, length of residency, life in another community, etc.)?**

I have training and experience with Contract Negotiations, conflict resolution, waste water treatment, Accounting/finance, facilities management, Human Resources. I have a bachelors degree from Michigan State University,with graduate work in Economics. Work experience includes Director of Public Works, for the city of Mount Pleasant MI responsible for Airport, City Engineering, Street Department, Water and Water Distribution, Water Resource Recovery, and trash and recycling, and as member of senior staff I am familiar with, and have had working relationship, with all other city of Mount Pleasant Divisions/Departments.

**Please list three personal or business references, including contact information. (Please note if applying for the Principal Shopping District Board, one reference should be the name of business nominating/supporting your appointment.)**

Jim Kridler 989-842-0870  
Kathy Ling 989-400-3529  
Steve Swaney 734-276-8009

Based on the board you are applying for, please check the appropriate box or boxes to indicate whether you have the stated experience or professional expertise that may be needed to fill a specific skillset. Please note these are desired qualifications. Some boards and commissions are a mix of citizens with certain qualifications and others are citizens representing the general public. Even if you do not have the desired experience or expertise, you are urged to apply for consideration as the community is well served by citizens with diverse backgrounds.

The image shows a small, low-resolution scan of a form titled "City of Mount Pleasant". The form appears to be a checklist or questionnaire for a board or commission application. It contains several rows of text, each followed by a checkbox, likely corresponding to the "desired qualifications" mentioned in the text above. The text is too small to read clearly, but the structure suggests a list of skills or experiences to be marked as "yes" or "no".



## CITY OF MOUNT PLEASANT

### Application for Board or Commission Appointment

In accordance with the City Charter, Michigan Constitution, and U.S. Constitution, an individual must be a registered voter in the City of Mt. Pleasant. By submitting this application you affirm that you meet this requirement. Limited exceptions for certain boards exist as indicated on the attached listing. For a complete description of each board and commission please see attached listing.

***Applications will be kept on file for three calendar years.***

*Please note that all information submitted in this application is public information and subject to disclosure.*

Name:

Nathan Gaca

Date:\*

01-24-2025

Date



8

Hour



30

Minutes

AM



Residence:

615 North Harris Street Mount Pleasant MI 48858

Mailing Address (if different than above):

Telephone:

6166105690

Cell Phone:

6166105690

E-mail

nathanialgaca@outlook.com

Please check all that apply:



I own property



I own a business located within the City of Mt. Pleasant



I rent property

Boards or Commissions in which you are interested. You may list more than one. Please list preferences in order. If your first choice is unavailable we may contact you for service on another board.



City Commission

Why are you interested in this particular board or boards?

I've always had an interest in local government. I watch all of the city commission and planning commission meetings, and have been looking for a time to attempt to join. I feel Mount Pleasant does an outstanding job and love to be a part of it. I have experience in leadership/management, and feel those skills could also be beneficial to the city. I'm very interested in government. I believe local government is much more important than whatever is happening in Washington or Lansing on any given day, as the decisions have a greater impact on everyone's day to day lives. I'm also raising a family here in MP, and would love to see the continued success of the city.

Please list any community service and/or prior board or commission service, including the name of the board and term of service.

Every year I am on our team from American Mitsuba that volunteers at the Special Olympics. I also worked/volunteered to get the amended Elliott-Larson Civil Rights Act passed which we were successful with in 2023.

What experience or training do you have which might be of special value on this board or commission (i.e. education, job experience, length of residency, life in another community, etc.)?

I'm currently a Team Leader at American Mitsuba. I have been in leadership for several years at several different jobs. I primally have a manufacturing background, but have also managed some retail locations.

Please list three personal or business references, including contact information. (Please note if applying for the Principal Shopping District Board, one reference should be the name of business nominating/supporting your appointment.)

Marian Wells - Current member of my team- 989-400-0210  
Karen McKenney - Former Colleague- 616-589-5920  
Chase Hoffman - Lifelong family friend - 616-490-4608

Based on the board you are applying for, please check the appropriate box or boxes to indicate whether you have the stated experience or professional expertise that may be needed to fill a specific skillset. Please note these are desired qualifications. Some boards and commissions are a mix of citizens with certain qualifications and others are citizens representing the general public. Even if you do not have the desired experience or expertise, you are urged to apply for consideration as the community is well served by citizens with diverse backgrounds.

Enter the message as it's shown\*



9-1-1 Central Dispatch Governing Board -Experience in emergency management response or social services needs.

- ☐ Emergency response ☐ County-wide coordination

Airport Advisory Board -Experience or knowledge in aviation businesses or pilot.

- ☐ Pilot ☐ Aviation businesses  
☐ Federal Aviation Administration rules

Audit Committee-Accounting knowledge, particularly governmental accounting.

- ☐ Accounting ☐ Auditing  
☐ Municipal Finance

Board of Review -Experience and/or training in matters related to real estate valuation.

- ☐ Banking/Finance ☐ Property Appraisal/Assessing  
☐ Real Estate/Development/Law

Building Authority -Experience and/or training in matters related to real estate.

- ☐ Banking/Finance ☐ Property Appraisal/Assessing  
☐ Real Estate/Development/Law  
(no agents or brokers)

Building, Fire, Housing and Sanitary Sewer Board of Appeals -Experience and/or training in matters relating to construction.

- ☐ Architecture ☐ Building Construction  
☐ Engineering

Chippewa River District Library Board of Trustees -Experience with the management, supervision and oversight of library facilities.

- ☐ Policy making ☐ Advertising/Marketing/Public Relations  
☐ Finance/Budget ☐ Knowledge of libraries

City Commission

- ☐ Policy making ☐ Finance/Budget  
☒ Knowledge of government

City/CMU Student Liaison Committee -Experience with communication and problem solving.

- ☐ Higher education ☐ Neighborhood preservation  
☐ Marketing and promotion

Cultural & Recreational Commission -Experience and/or training in recreation activities.

- ☐ Fitness/Recreation ☐ Physical Education  
☐ Advertising/Marketing/Public Relations

Dog Park Advisory Board -Experience with policy making, implementation of policies, and conflict resolution. A love for dogs.

- ☐ Own a dog ☐ Policy making  
☐ Conflict resolution

Downtown Development Authority (DDA) -Experience with business or methods to increase taxable value within the identified Mission/Pickard District.

- ☐ Banking/Finance ☐ New business development  
☐ Marketing and promotion ☐ Business recruitment and retention  
☐ Real estate development

Economic Development Corporation/ Brownfield Redevelopment Authority (EDC/BRA) -Experience with business or methods to increase taxable value within the City.

- ☐ Banking/Finance ☐ New business development  
☐ Real estate development ☐ Business recruitment and retention

Fire & Police Pension Board -Experience in investments or financial planning.

- ☐ Investments ☐ Accounting/Finance

Historic District Commission -Interest or knowledge in historic preservation.

- ☐ Architecture ☐ Building Construction/Engineering  
☐ Historic Preservation

Housing Commission -Experience and/or training in matters related to the housing industry, subsidized housing programs, or property management.

- ☐ Residential Real Estate ☐ Property Management/Leasing  
☐ Building Construction ☐ Low Income or Subsidized Housing  
☐ Housing Development/Law

Isabella County Material Recovery Facility Governing Board -Experience with recycling or industrial-type processing.

- ☐ Recycle markets ☐ Recycle practices

Isabella County Transportation Commission -Experience and/or training in matters related to transportation.

- ☐ Engineering ☐ Transportation  
☐ Transit (bus) user

Local Officers Compensation Commission -Experience in elected local positions, volunteer, or compensation.

- ☐ Elected local official ☐ Finance/Budget  
☐ Public Sector Compensation

Parks and Recreation Commission -Experience and/or training in recreation activities or parks management.

- ☐ Physical Education ☐ Advertising/Marketing/Public Relations  
☐ Fitness/Recreation ☐ Landscape Architecture

Planning Commission -Experience in land use related issues.

- ☐ Building Construction ☐ Architecture/Landscape Architecture  
☐ Land Use Planning ☐ Real Estate Development

Principal Shopping District Board

- ☐ Business recruitment, retention and expansion ☐ New business development

Tax Increment Finance Authority (TIFA) -Experience with business or methods to increase taxable value within the identified two districts (Downtown and Industrial Park North).

- ☐ New business development ☐ Business recruitment and retention

Zoning Board of Appeals -Interest or knowledge of land use related issues.

- ☐ Architecture ☐ Building Construction  
☐ Land Use Planning ☐ Real Estate Development/Law

## City of Mt. Pleasant

**NOTICE OF BOARD AND COMMISSION VACANCIES**

Applications are now being accepted for the following boards and commissions. Any qualified elector may submit his/her name or the name of another for consideration. An application is available for this purpose at the City Clerk's Office, and on the City's website at [www.mt-pleasant.org](http://www.mt-pleasant.org). Applications should be submitted online or to the City Clerk, 320 W. Broadway Street, Mt. Pleasant, MI 48858.

*City Charter limits service to four full consecutive terms. Most terms of appointment are for three years ending on December 31, staggered by year among the members.*

<b>9-1-1 Central Dispatch Governing Board</b> - Responsible for approval of Center policies, appointment and dismissal of Dispatch Center Director, and recommendation of annual operating budget.
<b>Audit Committee</b> (Terms expire June 30) - Nominate auditors; review scope of audit and results of auditor's examination.
<b>Board of Review</b> (Two-year terms) - Hear appeals on the assessment of real and personal property and determine assessments.
<b>Building Authority</b> (Six-year terms) - Issue revenue bonds to acquire, improve and/or enlarge parking or recreational facilities and equip the same.
<b>Building, Fire, Housing and Sanitary Sewer Board of Appeals</b> - Interpret provisions of the Michigan Building Code, International Fire Code, Sewer Use Ordinance and Housing Licensing Code, and hear appeals as provided by each code.
<b>Chippewa River District Library Board of Trustees</b> (Four-year term)- Provide citizen input concerning the policies, function, and future development of the library and its branches in Shepherd, Winn, Blanchard, and Rosebush.
<b>City/CMU Student Liaison Committee</b> - Serves as a vehicle for ongoing dialogue between students, residents, City officials and University officials. Responsible for offering recommendations and providing feedback on programs and/or activities to enhance the relationship between students and residents
<b>Cultural &amp; Recreational Commission</b> (Term expires April 30) - Working with appointees of other CRC-member governing bodies, develop cultural, educational, and recreational facilities and programs for youth, families, and senior citizens of Isabella County, and promote harmony between Native Americans and other community members.
<b>Dog Park Advisory Board</b> (Two-year terms) - Considers written complaints about use, operation, maintenance, and/or conditions of the Dog Park and provides written recommendation to the Mt. Pleasant Parks and Recreation Commission, Mt. Pleasant City Commission and Township Board for consideration. May also recommend procedural rules
<b>Downtown Development Authority (DDA)*</b> (Four-year terms) - Initiate projects and programs to halt property value deterioration and increase property tax valuation in designated districts.
<b>Economic Development Corporation/Brownfield Redevelopment Authority (EDC/BRA) *</b> (Six-year terms) - Initiate projects and programs to halt property value deterioration and increase property tax valuation in designated districts.
<b>Fire &amp; Police Pension Board</b> (Four-year terms) - Manage and operate the Mt. Pleasant Fire and Police Retirement System in accordance with Act 345, P.A. 1937.
<b>Historic District Commission</b> - Recommend to the City Commission appropriate historic district boundaries, review historic renovation plans, review Secretary of interior guidelines for historic preservation of properties within an established district, and implement the provisions of Ordinance No. 913. Also, may advise on projects such as awards for renovations, historic guidelines, applications for revolving loan fund applications, review of variance requests on historic properties, and assistance with bronze art.
<b>Housing Commission</b> (Five-year terms expire July 18) - Establish policy for and operate low-income housing programs within the City. (Appointed by City Manager)
<b>Isabella County Material Recovery Facility Governing Board</b> (Two-year terms) - Develop MRF operating guidelines, selection and termination of the contracted service provider, and recommendation of the annual operating budget to the Isabella County Board of Commissioners.
<b>Isabella County Transportation Commission</b> - Formulate and implement policies and procedures for administration and operation of County-wide transportation system.
<b>Local Officers Compensation Commission</b> (7-year term) - Recommend to the City Commission the salary of each elected City Official.
<b>Parks and Recreation Commission</b> - Advise City Commission on leisure time needs of the community, plan for development of park facilities and recreation programs.
<b>Planning Commission</b> - Guide the physical development of the City; advise the City Commission on growth policy
<b>Principal Shopping District Board (PSD) *</b> (Four-year terms) - Oversee activities funded by special assessment for beautification type activities and snow clearing of parking lots and adjacent sidewalks.
<b>Tax Increment Finance Authority (TIFA) *</b> (Four-year terms) - Initiate projects and programs to halt property value deterioration, increase property tax valuation and enhance economic activity in designated districts.
<b>Zoning Board of Appeals</b> - Hear appeals on decisions regarding enforcement of the Zoning Ordinance.

\* Some seats allow business interest as a requirement instead of voting registration.

# Nathan Gaca

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## Personal Info

📍 615 North Harris Street,  
Mount Pleasant, MI, 48858,  
United States

📞 6166105690

✉ [nathanialgaca@outlook.com](mailto:nathanialgaca@outlook.com)

---

## Skills

- Leadership
- Communication
- Teamwork
- Work ethic
- Time management
- Problem-solving

## Summary

Experienced leader with a proven track record of managing production teams to achieve and exceed goals. Skilled at troubleshooting, resolving operational issues, and fostering a positive work environment. Adept at improving efficiency, ensuring quality standards, and managing team performance in fast-paced environments.

---

## Work Experience

Team Leader, American Mitsuba, Mount Pleasant MI  
January 2023 - Present

- Lead a team of 7 production employees, ensuring timely completion of daily production goals.
- Troubleshoot and resolve issues and minimize downtime and keep up with production demands.
- Address employee concerns and conflicts, ensuring a positive work environment.
- Work with other departments to meet production deadlines while maintaining quality.

Team Member Support, Gentex Corporation, Zeeland MI  
January 2017 - November 2022

- Lead a team of 4 production employees.
- Focus on continuous improvement, finding ways to increase cycle time and increase efficiencies.
- Worked with various engineering departments to bring different teams together to find new solutions to problems we had on the manufacturing floor.

Canvasser, K2K Consulting (Freelance), Grand Rapids MI  
September 2019 - March 2020

- Canvased public locations and door to door to find support to amend the Elliott-Larson Civil Rights act.
- 

## Education

Grand Rapids Community College

I took various classes out of my own interest and curiosity. I have never been full-time, and I hope to continue my education throughout my life.

West Michigan Aviation Academy  
August 2011 - June 2015

Specialty high school with an emphasis on professional skills and leadership.

---

## Volunteering

### Elliott-Larson Civil Rights Act Support

September 2019 - March 2020

Volunteered at local events in support of amending the Elliott-Larson Civil Rights act.

### Special Olympics

The past few years, I have gone with a team from American Mitsuba to volunteer at the Special Olympics.

**From:** [Rachel Putnam-Farley](#)  
**To:** [Lemorie, Katy](#)  
**Subject:** New submission: Board & Commission Application  
**Date:** Wednesday, February 12, 2025 10:39:24 AM

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**STOP. THINK. READ. THINK AGAIN. EXTERNAL Message Warning**

This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.



**Board & Commission Application**

Name:	Rachel Putnam-Farley
Date:	02-12-2025 10:00 AM
Residence:	902 Elizabeth CT Mount Pleasant MI 48858
Cell Phone:	9895508386
E-mail	rpfarley16@gmail.com
Please check all that apply:	I own property
Boards or Commissions in which you are interested. You may list more than one. Please list preferences in order. If your first choice is unavailable we may contact you for service on another board.	City Commission empty seat
Why are you interested in this particular board or boards?	want to serve on the City Commission because I am passionate about helping our city grow and thrive. I believe in building a community that meets the needs of all residents—ensuring strong infrastructure, responsible development, and quality services that enhance our daily lives. My goal is to work collaboratively to create a city that is not only vibrant and prosperous but also welcoming and inclusive for everyone. I am committed to listening to our community and making thoughtful, forward-thinking decisions that support both current and future generations.



Please list any community service and/or prior board or commission service, including the name of the board and term of service.	I am an active member of my children's school PTO working to make the school the best it can be for both students and teachers. In the past I have served on the Genesee County March of Dimes and the state grant review committee for March of Dimes. I served on the Board of the Saginaw County Continuum of Care (CoC) as well as on two committees for the CoC.
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What experience or training do you have which might be of special value on this board or commission (i.e. education, job experience, length of residency, life in another community, etc.)?	I have a Masters degree in Public Administration and a Masters of Public Health. I have worked for large nonprofit organizations managing and developing programs, providing training and technical assistance across the state. I have worked for the Division of Victim Services within MDHHS for the past three years doing quality assurance, project management and technical assistance. We moved to Mount Pleasant 3 years ago from Bay City and we absolutely loved Bay City's riverfront district. I have five years of experience in directly overseeing multiple HUD, ESG and City Block grants for emergency shelter, transitional supportive housing, rapid rehousing, and permanent supportive housing. I am currently the recognized expert in housing within my Division within MDHHS. I feel that my combination of experience and education could be an asset to the commission and to the community.
---	---

Please list three personal or business references, including contact information. (Please note if applying for the Principal Shopping District Board, one reference should be the name of business nominating/supporting your appointment.)	Vicki Wakeman - +1 (989) 330-5728 vickikrcmarik@yahoo.com Lauren Adams (989) 859-7164 , ladams1832@gmail.com Brienne Glaser +1 (989) 330-1041 brie.glaser@gmail.com
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Type a question	County-wide coordination
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Audit Committee - Accounting knowledge, particularly governmental accounting. Accounting knowledge, particularly	Auditing
--	----------

governmental accounting.

Chippewa River District  
Library Board of Trustees  
-Experience with the  
management, supervision  
and oversight of library  
facilities.

Policy making  
Finance/Budget

city

Policy making  
Finance/Budget  
Knowledge of government

City/CMU Student  
Liaison Committee -  
Experience with  
communication and  
problem solving.

Higher education

Type a question

Policy making  
Conflict resolution

Fire & Police Pension  
Board -Experience in  
investments or financial  
planning.

Accounting/Finance

Type a question

Low Income or Subsidized Housing  
Housing Development/Law

Local Officers  
Compensation  
Commission -Experience  
in elected local positions,  
volunteer, or  
compensation.

Finance/Budget

You can [edit this submission](#) and [view all your submissions](#) easily.



Tuesday, February 4, 2025

## CITY OF MOUNT PLEASANT

### Application for Board or Commission Appointment

In accordance with the City Charter, Michigan Constitution, and U.S. Constitution, an individual must be a registered voter in the City of Mt. Pleasant. By submitting this application you affirm that you meet this requirement. Limited exceptions for certain boards exist as indicated on the attached listing. For a complete description of each board and commission please see attached listing. ***Applications will be kept on file for three calendar years.***

*Please note that all information submitted in this application is public information and subject to disclosure.*

**Name:** Ryon Skalitzky

**Date:** Monday, February 3, 2025 21:40

**Residence:**

714 Eastlawn St

**Mailing Address (if different than above):**

714 Eastlawn St

**Telephone:** 9899444985

**Cell Phone:** 9899444985

**Please check all that apply:**

☒ I own property

**Boards or Commissions in which you are interested. You may list more than one. Please list preferences in order. If your first choice is unavailable we may contact you for service on another board.**

I am interested in the open city commission position. Additionally, the board of parks & rec, as well as public works, and building authority.

**Why are you interested in this particular board or boards?**

I recently moved back to Mt. Pleasant and want to give back to the community I grew up in. I feel like there is a lack of empathy in our government. I have a diverse background and experience that can provide a unique perspective. I want to use these skills and insights to help navigate through these times and find a place where the community can thrive.

**Please list any community service and/or prior board or commission service, including the name of the board and term of service.**

Current Vice Chair of the ICDP. I have organized volunteer efforts during natural disasters. I volunteer in various community events like Market for the Arts. Am currently working with members of Friends of the Broadway to setup fundraising concerts. Recently, I have been recruiting help to start a fundraiser for the ACLU.

**What experience or training do you have which might be of special value on this board or commission (i.e. education, job experience, length of residency, life in another community, etc.)?**

A lot of empathy, an equal amount of energy, creative thinking, and enough heart to pump the Panama.

Honestly though, I've worked in numerous industries and have been able to apply the things I've learned throughout. It's provided me a practical understanding of how things work together. From sales to manufacturing, insurance to construction, we all have our part to play to make things work. Knowing where we fit is how we become of most value. This is my place, I want to be of value. .

**Please list three personal or business references, including contact information. (Please note if applying for the Principal Shopping District Board, one reference should be the name of business nominating/supporting your appointment.)**

Jessica Jernigan, School Board, 989-572-2260  
Anthony Feig, CMU Professor, 989-289-5535  
Jeff Prout, ICTC retiree and community activist, 989-621-9832

Based on the board you are applying for, please check the appropriate box or boxes to indicate whether you have the stated experience or professional expertise that may be needed to fill a specific skillset. Please note these are desired qualifications. Some boards and commissions are a mix of citizens with certain qualifications and others are citizens representing the general public. Even if you do not have the desired experience or expertise, you are urged to apply for consideration as the community is well served by citizens with diverse backgrounds.

**9-1-1 Central Dispatch Governing Board -Experience in emergency management response or social services needs.**

County-wide coordination

**Building Authority -Experience and/or training in matters related to real estate.**

Property Appraisal/Assessing

**Building, Fire, Housing and Sanitary Sewer Board of Appeals -Experience and/or training in matters relating to construction.**

Building Construction

**Chippewa River District Library Board of Trustees -Experience with the management, supervision and oversight of library facilities.**

Advertising/Marketing/Public Relations

**City Commission**

Knowledge of government

**City/CMU Student Liaison Committee -Experience with communication and problem solving.**

Marketing and promotion

<b>Cultural &amp; Recreational Commission - Experience and/or training in recreation activities.</b>	Advertising/Marketing/Public Relations
<b>Dog Park Advisory Board -Experience with policy making, implementation of policies, and conflict resolution. A love for dogs.</b>	Own a dog
<b>Economic Development Corporation/ Brownfield Redevelopment Authority (EDC/BRA) -Experience with business or methods to increase taxable value within the City.</b>	Business recruitment and retention
<b>Historic District Commission -Interest or knowledge in historic preservation.</b>	Building Construction/Engineering
<b>Housing Commission -Experience and/or training in matters related to the housing industry, subsidized housing programs, or property management.</b>	Property Management/Leasing Building Construction
<b>Isabella County Transportation Commission -Experience and/or training in matters related to transportation.</b>	Transportation
<b>Parks and Recreation Commission - Experience and/or training in recreation activities or parks management.</b>	Advertising/Marketing/Public Relations Landscape Architecture
<b>Planning Commission -Experience in land use related issues.</b>	Building Construction Architecture/Landscape Architecture
<b>Zoning Board of Appeals -Interest or knowledge of land use related issues.</b>	Building Construction





Wednesday, February 12, 2025

## CITY OF MOUNT PLEASANT

### Application for Board or Commission Appointment

In accordance with the City Charter, Michigan Constitution, and U.S. Constitution, an individual must be a registered voter in the City of Mt. Pleasant. By submitting this application you affirm that you meet this requirement. Limited exceptions for certain boards exist as indicated on the attached listing. For a complete description of each board and commission please see attached listing. ***Applications will be kept on file for three calendar years.***

*Please note that all information submitted in this application is public information and subject to disclosure.*

**Name:** Seth T Blackey

**Date:** Tuesday, February 11, 2025 22:00

**Residence:**  
404 Kane Street  
Mt. Pleasant, MI 48858

**Telephone:** 6034812419

**Cell Phone:** 6034812419

**E-mail** black2st@cmich.edu

**Please check all that apply:** ☒ I own property

**Boards or Commissions in which you are interested. You may list more than one. Please list preferences in order. If your first choice is unavailable we may contact you for service on another board.**

Mt. Pleasant City Commission board

**Why are you interested in this particular board or boards?**

I am interested in the Mt. Pleasant City Commission board to make a difference in the community. I have played a part in community activism and would like to continue doing so. I feel very strongly about the success and long term growth of this city that provided so much to me.

**Please list any community service and/or prior board or commission service, including the name of the board and term of service.**

Currently I serve as the chair for the Mount Pleasant Discovery Museum as well as the serving for the finance committee of the Mount Pleasant Community Foundation.

**What experience or training do you have which might be of special value on this board or commission (i.e. education, job experience, length of residency, life in another community, etc.)?**

I have extensive, hands on experience with financial statements from my tenure at the dealership, the Community Foundation as well as the Discovery Museum. My job experience has provided me the skills and talent to be a listening ear to the community and make decisions in the best interest of the community. Furthermore, being a longstanding community member I have a sincere passion for this community and the residents it holds.

**Please list three personal or business references, including contact information. (Please note if applying for the Principal Shopping District Board, one reference should be the name of business nominating/supporting your appointment.)**

Julie Rush - Keller Williams Signature Group  
Broker  
989-506-6664  
Julierush74@gmail.com

Lizzie Dilg - Mt. Pleasant Discovery Museum  
Executive Director  
248-707-4076  
Mpdmdirector@gmail.com

Dylan Wright - Graff Mt. Pleasant  
Business Manager  
989-721-2882  
Wrightdc@myyahoo.com

Based on the board you are applying for, please check the appropriate box or boxes to indicate whether you have the stated experience or professional expertise that may be needed to fill a specific skillset. Please note these are desired qualifications. Some boards and commissions are a mix of citizens with certain qualifications and others are citizens representing the general public. Even if you do not have the desired experience or expertise, you are urged to apply for consideration as the community is well served by citizens with diverse backgrounds.

**Audit Committee-Accounting knowledge, particularly governmental accounting.**

## Accounting

## Auditing

## City Commission

## Policy making

Finance/Budget

## Knowledge of government

**City/CMU Student Liaison Committee**  
**-Experience with communication and problem solving.**

## Higher education

## Marketing and promotion

**Cultural & Recreational Commission - Experience and/or training in recreation activities.**

Advertising/Marketing/Public Relations

**Dog Park Advisory Board -Experience with policy making, implementation of policies, and conflict resolution. A love for dogs.**

## Policy making

## Conflict resolution



**Downtown Development Authority (DDA) -Experience with business or methods to increase taxable value within the identified Mission/Pickard District.**

- Banking/Finance
- New business development
- Marketing and promotion
- Real estate development

**Economic Development Corporation/ Brownfield Redevelopment Authority (EDC/BRA) -Experience with business or methods to increase taxable value within the City.**

- Banking/Finance
- New business development
- Business recruitment and retention

**Fire & Police Pension Board - Experience in investments or financial planning.**

- Investments
- Accounting/Finance

**Historic District Commission -Interest or knowledge in historic preservation.**

- Historic Preservation

**Housing Commission -Experience and/or training in matters related to the housing industry, subsidized housing programs, or property management.**

- Residential Real Estate
- Property Management/Leasing

**Principal Shopping District Board**

- Business recruitment, retention and expansion
- New business development

**Zoning Board of Appeals -Interest or knowledge of land use related issues.**

- Architecture
- Building Construction
- Land Use Planning
- Real Estate Development/Law



## **EDUCATION –**

### **Northwood University - May 2017**

*Masters of Business Administration*

- General Motors Executive MBA

### **Central Michigan University - December 2013**

*Bachelor of Applied Arts*

- Entrepreneurship
- Professional Sales

### **Carew Sales Training – Top 10 Sales Training Companies**

- Dimensions of Professional Selling, Advanced Professional Selling, Pathway to Negotiation, Building Customer Equity (Enterprise Selling)

## **PROFESSIONAL EXPERIENCE–**

### **Graff Chevrolet, Graff Buick GMC Cadillac**

*General Sales Manager*

Mount Pleasant, MI. May 2013 – current

- Manage a team of 8-12 individuals in various roles
- Review and analyze monthly financial statements
- Create, monitor and review dealership goals, monthly and yearly
- Develop pay plans
- Develop buyers by maintaining rapport with previous customers
- Promote/sell finance and insurance products to all customers
- Promote dealership reputation by working with clients after the sales closes to ensure the customer experience is above expectations creating opportunity for returning customers
- Maintain Customer Satisfaction and Standard For Excellence scores

### **Central Michigan University**

*Student employee - PeopleBot*

Mount Pleasant, MI. November 2010 - May 2013

- Implemented technology into the College of Medicine (Conference rooms, tablet applications, labs)
- Conducted training sessions and created training materials for collaboration sites along with all current technology (iPads, smartphones, WebEx Meeting Center, WebEx Connect, Basecamp)
- Maintained technology for optimum functionality
- Maintained website functionality for College of Health Professions
- Coordinate all new staff and faculty technology set-up

**WalMart Store, Inc.***Customer Service Manager*

Mount Pleasant, MI/Plymouth, NH. July 2008 - February 2011

- Opened and closed the store numerous times
- Completed transactions with customers totaling over \$3,000 per day
- Managed all cashiers lunch breaks
- Balanced cash drawers totaling over \$8,000 in sales each

**Professional Automotive Detailing***Entrepreneur*

Mount Pleasant, MI/ Plymouth, NH. 2006 - 2010

- Managed all business funds (started and manage a \$10,000 per year automotive detailing business)
- Developed and executed all marketing and advertising campaigns to increase market penetration
- Supervised and managed 3 employees activities

**PERSONAL/PROFESSIONAL DEVELOPMENT-**

- Mount Pleasant Community Foundation - finance committee
- Mount Pleasant Discovery Museum - Board Chair
- Engineers Without Borders; Central Michigan University - Vice President, Secretary, Fundraising Chair, Workshop Coordinator (October 2012)
- GSA (Gay Straight Alliance) – Former President - created agendas, increased membership by 8 people per semester
- Pi Sigma Epsilon – Professional Business Fraternity Alumni
- El Salvador Community Development trip (EWB, March 2011)
- Guest lecturer, Personal Finance at Central Michigan University

**SCHOLARSHIPS/AWARDS/RECOGNITIONS -**

- President's Awards - Central Michigan University (Academic award)
- Premier Project Award - Engineers Without Borders
- Top performing sales consultant 7/12 months in 2016
- General Motors Mark of Excellence award 2016

CALIFORNIA  
TEXAS  
COLORADO

CPS HR  CONSULTING



## PROPOSAL

# City of Mount Pleasant

Consultant Services for Workplace Climate Survey

RFP 2025CSWCS

**Due: February 20, 2025**

**7:30 A.M. ET**

Submitted by:

**Vicki Quintero Brashear**

Chief of Client Services

CPS HR Consulting, 2450 Del Paso Road, Suite 220, Sacramento, CA 95834

P: (916) 471-3481, [vbrashear@cpshr.us](mailto:vbrashear@cpshr.us)

Tax ID: 68-0067209

[www.cpshr.us](http://www.cpshr.us)

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# Cover Letter

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February 20, 2025

City of Mt. Pleasant  
320 W. Broadway  
Mt. Pleasant, MI 48858

***Submitted by email to: [clerk@mt-pleasant.org](mailto:clerk@mt-pleasant.org)***

CPS HR Consulting is pleased to submit this proposal to the City of Mt. Pleasant to provide employee engagement survey services. CPS HR is a self-supporting government agency (joint powers authority) that specializes in addressing the unique challenges faced by other government agencies. We understand the context and environment of government and have been a trusted advisor to our public-sector clients for 40 years.

The Institute for Public Sector Employee Engagement™, a division of CPS HR, has worked with hundreds of government agencies to design, administer, analyze the results of – and take action on – employee surveys. We recognize the importance of supporting the City’s vision, mission, values and strategic planning. Our process creates actionable data to attract and retain talent and to enhance your ability to deliver consistently high-quality services to your community.

Contact Information	
Project Lead	Janelle Callahan, Principal Consultant, (916) 471-3381 or <a href="mailto:jcallahan@cpsshr.us">jcallahan@cpsshr.us</a>
Authorized Contract Representative	Vicki Quintero Brashear, Chief of Client Services (916) 471-3481; <a href="mailto:vbrashear@cpsshr.us">vbrashear@cpsshr.us</a>
Contracts	Dimple Patel, Contracts Manager, (916) 471-3363, <a href="mailto:dpatel@cpsshr.us">dpatel@cpsshr.us</a>

## **CPS HR offers:**

A singular focus on the public sector, including an understanding of how to drive change in the unique environment of government;

- Team members with deep expertise in employee engagement;
- A proven model for measuring engagement and acting on the results;
- Engagement questions specifically designed for government;
- A customized survey to meet the needs of the City;
- National benchmark data from our survey of public- and private-sector employees; and
- A range of other services beyond the those covered in this proposal, including classification/compensation studies, training, workload assessments, and more.

On the following pages, we have outlined our general approaches and methodologies in our service areas and provided pricing in accordance with the RFP requirements. Should you have questions about the information presented in our proposal, please contact Janelle Callahan.

Sincerely,

A handwritten signature in blue ink, appearing to read "Vicki D. Brashear".

Vicki Quintero Brashear, Chief of Client Services



# Business Information and Background

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## About CPS HR Consulting

CPS HR is a client-focused human resources and management consulting firm, dedicated to addressing the unique challenges faced by government and non-profit organizations. Founded in 1985, we have earned a reputation as a trusted advisor by leveraging our in-depth public sector expertise to deliver practical, results-driven solutions. As a Joint Powers Authority, we are a self-supporting government agency exclusively serving public entities. This gives us a distinct advantage in understanding and meeting the specific needs of clients across all levels of government, including Federal, State, Local, Special Districts, Higher Education and Non-Profit organizations.

Our unwavering commitment to delivering an unparalleled client experience is built on our comprehensive knowledge of the complexities within the public and non-profit sectors. We assist organizations in attracting, hiring, retaining, and motivating top talent, essential for driving organizational excellence in alignment with their vision.

With more than 100 full-time employees and a network of 200+ project consultants and technical experts across the nation, CPS HR has partnered with more than 2,700 public and non-profit clients throughout the United States. Headquartered in Sacramento, CA, with regional offices in Texas, Colorado, and Southern California, we are strategically positioned to support your organization's growth and help your employees fulfill the promise of public service.

## Client Focused

We help clients succeed by:

- **Understanding Their Goals:** We listen to your needs, understand your business, and focus on achieving your desired outcomes.
- **Unlocking New Perspectives:** Together we explore new ideas, expand possibilities, and consider the broader impact on those you serve.
- **Bringing Solutions to Life:** We put plans into action, making strategies operational and effective.
- **Empowering Their Growth:** Provide you with the tools and knowledge to elevate performance and expand capabilities for your organization and those you serve.

# Project Approach

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We believe employee engagement can – and should – be measured. Government organizations should survey their employees to measure engagement levels, to understand what drives engagement, and to improve retention. While there is no one-size-fits-all solution to building a high level of engagement, CPS HR will leverage decades of research, experience, and insights to help guide the City on a path to improved engagement and retention.

## Step 1 – Plan

After we have a solid understanding of the City’s goals and critical issues, we will work with you to finalize the survey instrument and administration process. Our starting point will be the CPS HR Institute for Public Sector Employee Engagement Survey, carefully constructed questions to measure engagement specifically in the unique environment of the public sector. We developed the standard survey questions based on national public sector surveys (U.S., U.K., Canada, Australia) and decades of research on employee engagement. We can also help develop questions of interest to the City. We will work with the City to finalize the survey, including the demographic questions you decide to include. We will also develop and include up to three open-ended questions.

We also provide a range of benchmarks, including from our online national survey of the U.S. workforce that represents a wide range of industries/occupations and geographic locations. This dataset, available exclusively to our clients, will allow the City to compare its survey results (overall levels of engagement and question-by-question results) to the public sector as a whole; as well as to local government employees, the state and federal government workforces, and private-sector employees. Unlike many other engagement survey providers, we do not use our client data for benchmarks, and instead provide these high-quality benchmarks from our national poll.

In addition to our national benchmarks, we will create benchmarks specifically for the City. We provide an easy-to-use reporting tool for exploring your own trends for any surveys conducted by CPS HR, including engagement, climate, benefits satisfaction, or other topical “pulse” surveys. In the section below, we describe the steps CPS HR’s Institute will take to work with you to plan and conduct the survey and take action on the results.

### To design the survey, the Institute will:

- Provide our recommended survey questions as a starting point.
- Agree with the City on the questions to include in the survey, including demographic questions (e.g., age, tenure), as well as any information tracked in the contact file. The contact file may include up to 10 organizational or demographic variables tracked on the backend. Agree on up to three open-ended narrative questions to include in the survey.
- Provide our communication guide and template, which includes suggestions and FAQs, to serve as a basis for a comprehensive communication strategy. **Please note** that the City will need to finalize any communications.

- Provide instructions for IT to “allow-list” our email invitations to ensure they are not diverted due to SPAM filters.
- Program the survey. **Please note** that this proposal assumes an English-only survey. **Optional:** We can provide survey translations in languages other than English. We collaborate with a professional language translation service to provide the highest quality translations.

**The City will:**

- Identify a single point-of-contact for the Institute who can make, or coordinate, decisions on this project.
- Work collaboratively with the Institute to finalize the survey, including deciding which demographic questions to include, as well as the open-ended questions to include.
- Decide on question-level breakout reports (e.g., departments/divisions). **Please note:** All report needs must be identified at this initial stage. Results reports cannot be combined or changed after the survey is conducted.
- Provide an Excel file with accurate employee contact information (name, email address and organizational/work unit) for each employee.
- Communicate to employees the cut-off date and who will be included in the survey (e.g., employees who started after the final contact file was submitted will not be included in the survey). Communicate about the upcoming survey by all-staff email and other forums (e.g., meetings, posters).
- Work with the City’s IT to “allow-list” our email domain to ensure our email survey invitations with survey links are not rejected. Allow-listing is critical our process, and we rely on City IT to advise us if there are any special limitations on emails. Delivery of emails may take some time depending on City IT security.

**Conduct the survey kickoff presentations to leaders and employees:**

We will conduct a survey kickoff presentation with employees and any stakeholders you designate. We will also brief City leaders in advance of the employee kickoff presentation. Any live presentations may be recorded and shared by the City. If requested, the Institute may provide a brief (5-minute) recording in lieu of a live presentation.

During the leadership kickoff presentation, we will discuss the survey process. We will cover what engagement is, why it matters, and actions that other public-sector organizations have taken to improve engagement. For the employee kickoff presentation, we will explain the process and emphasize that individual employee survey responses will be confidential. For both presentations, we will communicate the importance of achieving a high response rate.

**The Institute will:**

- Review background information (e.g., strategic plan/goals) and collaborate on the meeting agenda.
- Conduct one leadership kickoff presentation and one employee presentation.

**The City will:**

- Schedule the meetings, including inviting key leaders and other critical staff.
- Provide background information and feedback to help finalize the agenda.

## **Step 2 – Survey Employees**

**To administer the survey, the Institute will:**

- Program and test the survey in Alchemer, our online survey administration platform. **Please note:** if required, we can aim to provide a 508-compliant accessible survey. CPS HR will use testing tools within Alchemer to determine the level of accessibility. Should any accessibility issues arise, CPS HR will assist the respondent with an alternative way to complete the survey.
- Send an email invitation with the survey link and reminders to all City employees. We assume all employees have access to their City email and computers or mobile devices. **Please note:** This proposal does not include a paper survey option. If paper surveys or other options are needed, please let us know. We are happy to explore alternatives with you.
- Provide an email address for employees to contact CPS HR's Institute with questions or technical problems.
- Send reminder emails and report on response rates during the survey period.

**The City will:**

- Encourage employees to participate and, if necessary, answer any non-technical employee questions.
- If necessary, make arrangements (e.g., laptops or kiosks) for employees to complete the survey online.

## **Step 3 – Analysis and Recommendations**

Our analytical approach applies a range of methods to identify strengths, opportunities for improvement and recommended actions. The CPS HR Institute will deliver a summary of findings report that includes City-wide summary scores for level of engagement (i.e., percent of employees who are fully engaged, somewhat engaged, and not engaged).

The Institute will also provide our proprietary benchmarks for overall engagement levels as well as for the individual questions in our survey. These benchmarks are for internal City use, to compare the views of City employees to other public- and private-sector employees, including in local government.

We will also provide more detailed question-by-question results (i.e., percent positive, neutral and negative) for the City overall, and for the breakouts (e.g., departments) through our online tool. The tool will allow you to review, sort and drill down on questions, compare results with various benchmarks, and download the results to Excel or PDF. **Please see Appendix A for report samples.**

**Optional Comments** - For any open-ended questions, we will compile and report on the responses from the open-ended (verbatim) survey questions. **Please note** that we will report these open-ended responses un-edited, except we will redact names/self-identification only. Our reporting will not include qualitative or content analysis of the written responses.

**Recommendations** - The Institute will also offer City-wide recommendations to take action on key questions from our resource library. These will range from no-cost quick wins to more comprehensive solutions. Our recommendations will be supplemented by lists of resources that include tools, templates, checklists, guides, videos, articles and even books on each key issue.

**Key Driver Analysis** - The Institute will use regression analysis to identify the questions that have the largest impact (i.e., the key drivers) on the City's engagement score, provided there are at least 100 responses. We will provide one key driver analysis for the entire City.

**The Institute will:**

- Prepare an Executive Summary with the main findings and recommendations.
- Provide access to our dynamic, online reporting tool that will allow the City to conduct deep dives into question-level results for the City overall, and for each of the breakout groups.
- Produce a City-wide overview PowerPoint report.
- Conduct one key driver analysis to determine which survey factors and questions have the largest impact on the City-wide employee engagement score.
- Recommend specific actions to improve employee engagement from our recommendations library, linked to City overall survey results.
- **Optional:** Report the raw open-ended survey question comments with only names redacted.

**The City will:**

- Share the overall results and describe next steps to employees.
- Help protect the Institute's proprietary benchmarks.
- Complete our report access file to identify leaders who need access to the survey results reports.
- **Please note:** if any 508-compliant reports are required, the City will be responsible for converting any PowerPoint or PDF deliverables to meet its specific needs. The online reporting tool is not 508-compliant because it is dynamic and interactive.

## Step 4 – Discuss Results

We believe it is important to share results with employees as soon as possible after the survey closes. We will present the City's overall results in a webcast. On request, we will brief City leaders in advance of a presentation to all employees. Any presentations may be recorded by the City and shared with employees. If requested, the Institute may provide a brief recording in lieu of a live presentation.

**The Institute will:**

- Present results in a webcast.

**The City will:**

- Schedule any presentations or meetings, including inviting key leaders and other critical staff.
- Designate any participants for optional services, if held, coordinate scheduling and resources, and provide information and instructions to prepare for the sessions.

**Optional Focus Groups:** Employee focus groups allow small groups of employees to provide candid feedback on key areas highlighted in the survey results as important to the engagement of City employees. We will conduct the sessions, sort the responses into categories and summarize the results in a PowerPoint slide deck. Focus groups provide a deep level of information and connection since they are conducted in a confidential manner with small groups of 6 to 8 employees.

**The Institute will:**

- Plan and conduct up to 3 remote focus groups (90-minute sessions each, with 6 to 8 employees per group) to drill down on the results and develop recommendations from employees. We will then submit a summary PowerPoint report on these discussions with recommended next steps.
- Provide scheduling support for focus groups.

**The City will:**

- Identify any implementation concerns and how the Institute may help.
- Schedule any presentations, meetings, or focus groups including inviting key leaders, employees, and other critical staff.
- Designate any participants for optional services, if held, coordinate scheduling and resources, and provide information and instructions to prepare for the sessions.

## **Step 5 – Take Action**

We encourage the City to take action on at least one survey finding. Communicate progress and let employees know that it was their feedback that led to the change. Most organizations we work with take action on one or two organization-wide issues, and then also ask each department leader to take action on one or two issues in their department.

**Action Planning Workshop:** This structured workshop will help your leaders discuss key survey results and begin to develop action plans. We will provide templates and discuss common challenges. Following the workshop, leaders will need to finalize their own action plans.

**The Institute will:**

- Plan and conduct one remote action planning workshop (2 hours, with up to 20 participants) with designated by City leaders and implementation teams to learn how to identify and develop specific actions to address issues identified in the survey.

**The City will:**

- Decide on the actions to improve employee engagement.
- Identify any implementation concerns and how the Institute may help.
- Schedule any presentations or meetings, including inviting key leaders and other critical staff.

Pulse Surveys: **Please note** that we have also included a quote for pulse surveys. Pulse surveys are shorter in length than the standard surveys and may include perceptions of changes made since the last survey, follow-up questions of interest to the City, or customized topical questions. The content for either the standard or pulse survey is assumed to be employee-focused with all participants receiving the same questions. This proposal does not include different questions for different groups of employees (e.g., branching/customized logic, or 360 assessments).



## Experience and Qualifications

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CPS HR has worked with hundreds of government agencies to design, administer, analyze the results of – and take action on – employee surveys. We recognize the importance of supporting the City of Mt. Pleasant’s vision, mission, values and strategic planning. Our process creates actionable data to attract and retain talent and to enhance your ability to deliver consistently high-quality services to your community.

Some of the ways we will meet and exceed the City’s requirements are as follows:

- CPS HR has been and is regularly and continuously engaged in the business of providing organizational assessment and development services since 1985.
- CPS HR has broad and diverse experiences working with people of various educational, generational, and multicultural backgrounds.
- As a public agency ourselves, we understand the organizational challenges that cities and counties face. Our experience is focused on serving the HR/organizational needs of public sector clients.

### Employee Engagement Projects:

The following is a partial list of recent clients for which we have provided similar surveys, focus groups and/or action planning services.

- City of Houston, TX (2024) – survey and 25 results discussions with department leadership teams
- City of Memphis, TN (2017-present) – City-wide surveys and focus groups
- City of Norfolk, VA (2021-present) – surveys, 10 focus groups, and 2 action planning sessions
- City of Rochester, MN (2019-present) – surveys and results discussions with leadership teams
- City of Rohnert Park, CA (2024) – survey and one feedback session (world-café style with employees)
- City of San Antonio, TX (2018-present) – surveys and 30 results discussions with leadership teams
- County of San Diego, CA (2022-present) – surveys and 10+ action planning sessions
- County of Roanoke, VA (2018-2023) – surveys, 6 focus groups, and 1 action planning session
- Daniel Boone Regional Library, MO (2024-present) – survey and 9 focus groups

# Staffing

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## Key Staff Expertise

### Janelle Callahan, Principal Consultant and Project Manager

Janelle Callahan has her M.A. in Human Services Psychology and helped start the Institute for Public Sector Employee Engagement at CPS HR in 2017. Prior to joining CPS HR, she worked for the Partnership for Public Service, where she led the *Best Places to Work in the Federal Government* research. She also worked for the newspaper *Education Week*, and the Institute for Learning Innovation, and has more than **20 years** of experience conducting research and working with leaders to support the effectiveness of public institutions.

Janelle is a Certified Human Capital Strategist and has published several articles on employee engagement and served as a Planning Commissioner for the City of Shoreline, Washington. She currently lives in Deerfield, Massachusetts.

### Jose Gonzalez, Senior Consultant

Jose Gonzalez is a dedicated public servant with over **seven years** of public service. Jose has an M.P.A. with a specialization in Employee-Employer Relations from California State University, Long Beach and holds a SHRM-CP designation from the Society of Human Resource Management. Before joining CPS HR, Jose held several human resource positions in both municipal government and school districts where he performed recruitment, selections, and employee-employer relations, interpreted collective bargaining agreements, performed reasonable accommodations and managed leaves, and led various projects in employee engagement and employee training. Jose currently resides in San Diego, California.

### Dr. Angela Love, Executive Coach

Dr. Angela Love has more than 15 years of experience in human resources, organizational development, coaching, mentorship, and trauma-informed practices. She holds a doctorate in Organizational Development and has worked in various leadership roles within the nonprofit sector and California Community College District. Dr. Love is the Executive Director of an educational nonprofit organization that provides enrichment, learning, and leadership opportunities to diverse student populations in socioeconomically disadvantaged neighborhoods. She also hosts a weekly mentorship group for women in her community. At CPS HR, she provides expertise on projects to turn research results and recommendations into actionable solutions through facilitation, coaching, and training. Dr. Love is based in Marysville, California.

# Cost Proposal

## Recommended Total

The following section presents a comprehensive set of services recommended by CPS HR. If possible, it is advantageous to include a follow-up survey and additional services. The City is under no obligation to use all services in a contract with CPS HR. **The City may choose any options, including the lowest-cost service of one pulse survey (\$7,760).**

Service	Fee
2025 Employee Survey - Standard (Fixed Fee)	\$12,370
2026 Employee Survey - Pulse (Fixed Fee)	\$7,760
2025 or 2026 Survey Options (e.g., comments and/or extra reports)	\$2,000
Additional Services (Time & Materials)	\$4,000
Reimbursable Expenses	\$2,500
<b>Recommended Not-to-Exceed Total</b>	<b>\$28,360</b>

## Standard Survey and Pulse Survey Packages

The standard survey package includes kickoff and results presentations, approximately 70 questions in the survey, one key driver analysis, one recommendations report, and up to 10 breakout reports. The pulse survey package includes approximately 20 questions in the survey and up to 10 breakout reports. Pulse surveys typically include perceptions of changes made since the last survey, follow-up questions of interest to the City, or customized topical questions. The pulse survey package does not include kickoff or results presentations or a key driver analysis

Phase	Standard Survey Included Services	Optional Services	Optional Services Costs
1. Plan (Weeks 1 – 6)	<ul style="list-style-type: none"> <li>Tailor and finalize the survey (<b>about 70 questions</b>) and process</li> <li>Develop survey plan and milestones</li> <li>Provide communication guide</li> <li>Conduct one webcast kickoff presentation for leaders</li> <li>Conduct one webcast kickoff presentation for employees</li> </ul>	<ul style="list-style-type: none"> <li>Conduct additional kickoff presentations (webcast)</li> <li>Conduct in-person kickoff presentation</li> </ul>	<p>\$450/meeting</p> <p>See Additional Services</p>

Phase	Standard Survey Included Services	Optional Services	Optional Services Costs
		(instead of webcast)  • Provide translation of survey in a language other than English  • Include up to 3 open-ended questions	\$1,200/per language  \$570
2. Survey Administration (Weeks 6 – 8)	• Launch survey by sending email invitations with individual survey links to 125 employees • Monitor response rates and send 3 response rate reports • Send email reminders to employees • Answer employee technical questions via email	N/A	N/A
3. Analysis and Recommendations (Weeks 9 – 14)	• Provide an Executive Summary with the main findings and recommendations • Provide results reports (and summary of findings PowerPoint and <u>up to 10</u> question-level reports) • Provide 1 City-wide key driver analysis • Provide recommendations for action for the City overall	• Additional key driver analysis  • Additional question-level results reports  • Additional recommendations reports	\$650/each  \$100*/report  \$150/report

Phase	Standard Survey Included Services	Optional Services	Optional Services Costs
4. Discuss Results (Week 15)	<ul style="list-style-type: none"> <li>Present results via webcast</li> </ul>	<ul style="list-style-type: none"> <li>Conduct additional results presentations (webcast)</li> <li>Present results in person (instead of webcast)</li> <li>Conduct and report on <b>focus groups</b> (<i>confidential with small groups</i>) and deliver summary PowerPoint report</li> <li>Conduct and report on <b>feedback sessions</b> (<i>large group in an open forum</i>) and deliver summary PowerPoint report</li> </ul>	<p>\$450/meeting</p> <p>See Additional Services</p> <p>See Additional Services</p>
5. Take Action (Weeks 16 – 24)	N/A	<ul style="list-style-type: none"> <li>Conduct one action planning workshop</li> <li>Implementation support for an individual leader</li> <li>Follow-up Interviews</li> </ul>	See Additional Services
<b>Total</b>	<b>\$12,370</b>	<b>Total</b>	<b>TBD**</b>

\* Additional analysis (e.g., new combinations of results) after the survey is conducted is not included.

\*\*All services listed are “Optional Services” and the City may determine from the list which items they desire to include as priced accordingly. The City is under no obligation to use the optional services shown here.

Phase	Pulse Survey Included Services	Optional Services	Optional Services Costs
1. Plan (Weeks 1 – 6)	<ul style="list-style-type: none"> <li>Tailor and finalize the survey (<b>about 20 questions</b>) and process</li> <li>Develop survey plan and milestones</li> <li>Provide communication guide</li> </ul>	<ul style="list-style-type: none"> <li>Include up to 3 open-ended questions</li> <li>Provide translation of survey in a language other than English</li> </ul>	<p>\$570</p> <p>\$1,200</p>
2. Survey Administration (Weeks 6 – 8)	<ul style="list-style-type: none"> <li>Launch survey by sending email invitations with individual survey links to 125 employees</li> <li>Monitor response rates and send 3 response rate reports</li> <li>Send email reminders to employees</li> <li>Answer employee technical questions via email</li> </ul>	N/A	N/A
3. Analysis and Recommendations (Weeks 9 – 14)	<ul style="list-style-type: none"> <li>Provide an Executive Summary with the main findings and recommendations</li> <li>Provide results reports (summary of findings PowerPoint and <u>up to 10</u> question-level reports)</li> <li>Provide recommendations for action for the City overall</li> </ul>	<ul style="list-style-type: none"> <li>Deliver additional breakout reports*</li> <li>Deliver additional recommendations reports</li> </ul>	<p>\$100/report *</p> <p>\$150/report</p>
4. Discuss Results (Week 15)	N/A	<ul style="list-style-type: none"> <li>Conduct and report on <b>focus groups</b> (<i>confidential with small groups</i>) and deliver summary PowerPoint report</li> <li>Conduct and report on <b>feedback sessions</b> (<i>large group in an open forum</i>) and deliver summary PowerPoint report</li> </ul>	See Additional Services
5. Take Action (Weeks 16 – 24)	N/A	<ul style="list-style-type: none"> <li>Conduct one action planning workshop</li> </ul>	See Additional Services

Phase	Pulse Survey Included Services	Optional Services	Optional Services Costs
		<ul style="list-style-type: none"> <li>• Implementation support for an individual leader</li> <li>• Follow-up Interviews</li> </ul>	
<b>Total</b>	<b>\$7,760</b>	<b>Total</b>	<b>TBD**</b>

\* Additional analysis (e.g., new combinations of results) after the survey is conducted is not included.

\*\*All services listed are “Optional Services” and the City may determine from the list which items they desire to include as priced accordingly. The City is under no obligation to use the optional services shown here.

## Additional Services – Time & Materials

For any Additional Follow-up Support Services, CPS HR will bill the City on a time and materials basis each month for work completed and reimbursable fees for travel expenses. A time and materials cost structure affords the greatest flexibility to the City in determining the number of sessions, focus areas, and level of support. Below you will find tables that outline estimated hours and costs.

Service	Estimated Hours*	Approximate Consulting Cost**
One individual follow-up interview	2 hours (30 minutes for preparation, <u>one hour (or less)</u> to conduct the interview, 30 minutes to document themes)	\$300
In-person Kickoff or Results Presentations or Meetings	4 hours for one presentation (2 hours preparation, 1 hour delivery, 1 hour follow-up meeting on-site)	\$780
Employee Focus Groups	30 hours for three focus groups	\$5,850
Employee Feedback Session <i>Two consultants may be needed for large groups or multiple sessions. Must be in-person.</i>	20 hours for one session – up to 40 attendees (10 hours preparation, 2-hour delivery, 8 hours for notes and follow-up meetings)	\$3,900
Employee Sign-up Support	10 hours	\$1,310**
Action Planning Workshop for Leaders	15 hours for one session (On-site or remote)	\$2,925
Action Planning Implementation Support Services for Leaders	10 hours for a series of meetings (On-site or remote)	\$1,950

Service	Estimated Hours*	Approximate Consulting Cost**
Results Discussion and Customized Recommendations Report for a Leader	2 hours (1-hour meeting and 1 hour for prep and follow-up) (On-site or remote)	\$390

*\*Final number of estimated hours depends on the City's specific needs, such as number of planning or follow-up meetings required, number of focus groups or sessions, or number of presentations.*

*\*\*Assumes minimum hours with a Senior Project Consultant unless otherwise noted. Actual cost will depend on specific needs and staffing.*

Staff Member	Hourly Rate
Executive Coach	\$195
Principal Consultant/Project Manager	\$151
Senior Consultant	\$135
HR Consultant/Program Coordinator	\$115
Administrative Technician/Associate HR Consultant	\$100
Office Assistant	\$95

The City may alternatively desire to encumber a maximum spending amount (for example, \$4,000) and draw down on the cap for various tasks on an ad hoc basis based on the City's priorities.

### Reimbursable Expenses

Most work is expected to be delivered mostly remotely, but if travel is necessary, the City will reimburse CPS HR at cost to include air travel, ground transportation, lodging, and meals per government rates. Travel time from door-to-door would be billed at 75% of the consulting rate. CPS HR recommends adding **\$2,500 in expenses**, as needed and the City will only be billed monthly after an expenditure has been incurred.



## Timeline

To deliver exceptional service and successfully conduct the engagement survey, we propose the timeline of activities listed in the table below. Our schedule will enable us to work with the City to conduct the survey, deliver results reports, support you to develop an action plan and implementation strategy, act on the plan, and evaluate progress. This schedule will require close communication between the City and CPS HR, as well as timely City feedback and approval on survey stages and products. After we have a signed contract, our Project Lead will provide a list of potential project timelines available and agree on a target survey launch date. Next, once we agree on the survey questions, and receive the City's list of employees with valid email addresses, we can launch the survey in approximately four weeks. The timeline also incorporates a three-week period for employees to complete the survey, and approximately four weeks to analyze results and prepare reports.

*Possible timelines for 2025 include:*

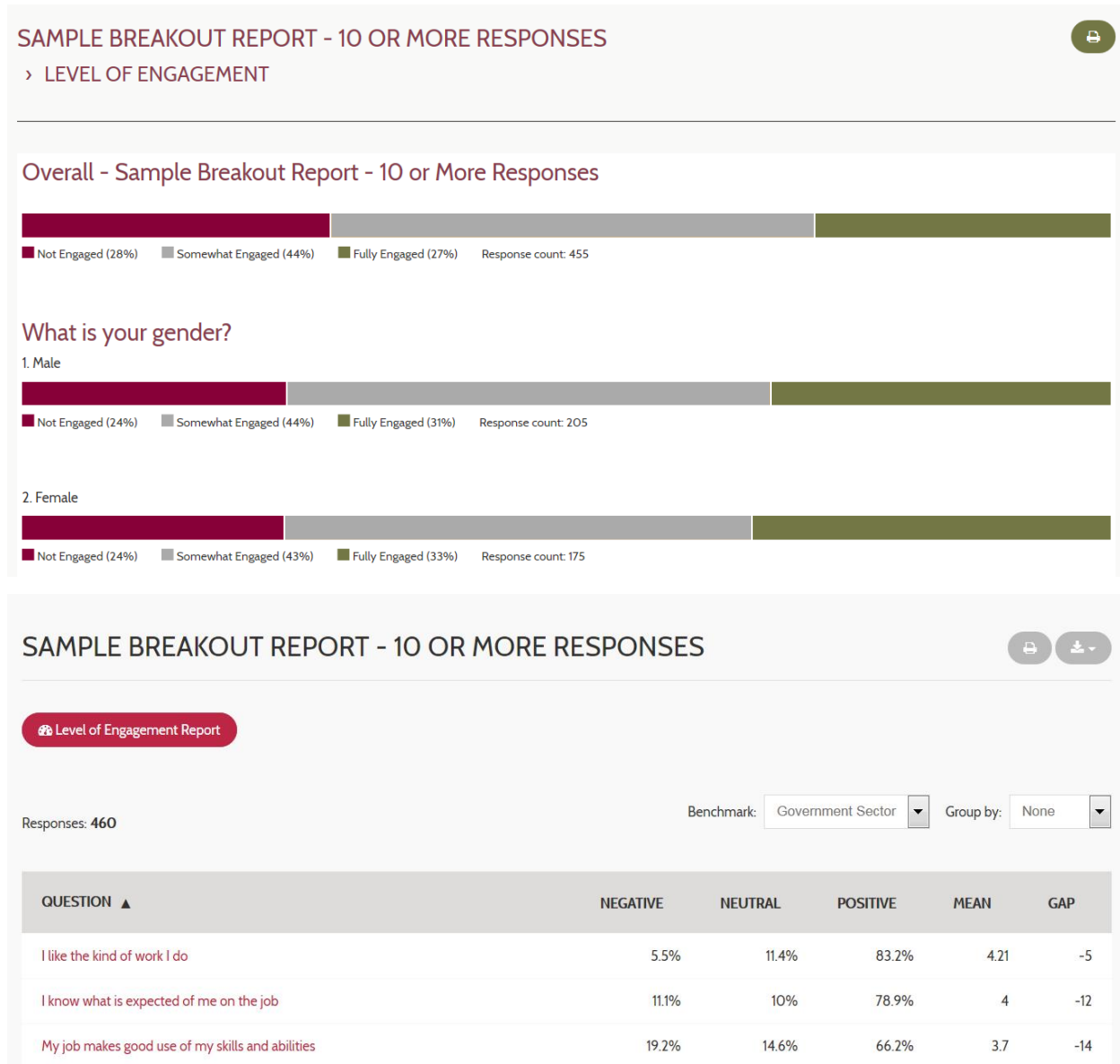
Final Files Due to CPS HR	Survey Launch Date	Survey Close Date	Report Due Date
3/14/2025	4/14/2025	5/2/2025	6/2/2025
3/21/2025	4/21/2025	5/9/2025	6/9/2025
3/28/2025	4/28/2025	5/16/2025	6/16/2025
4/4/2025	5/5/2025	5/23/2025	6/23/2025
4/11/2025	5/12/2025	5/30/2025	6/30/2025
4/18/2025	5/19/2025	6/6/2025	7/8/2025
4/25/2025	5/27/2025	6/13/2025	7/14/2025
5/2/2025	6/2/2025	6/20/2025	7/21/2025
5/9/2025	6/9/2025	6/27/2025	7/28/2025
5/16/2025	6/16/2025	7/7/2025	8/5/2025
5/23/2025	6/23/2025	7/11/2025	8/11/2025
6/6/2025	7/7/2025	7/25/2025	8/25/2025
6/13/2025	7/14/2025	8/1/2025	9/2/2025
6/20/2025	7/21/2025	8/8/2025	9/8/2025
6/27/2025	7/28/2025	8/15/2025	9/15/2025
7/3/2025	8/4/2025	8/22/2025	9/22/2025
7/11/2025	8/11/2025	8/29/2025	9/29/2025
7/18/2025	8/18/2025	9/5/2025	10/6/2025
7/25/2025	8/25/2025	9/12/2025	10/13/2025
8/1/2025	9/2/2025	9/19/2025	10/20/2025
8/8/2025	9/8/2025	9/26/2025	10/27/2025
8/15/2025	9/15/2025	10/3/2025	11/3/2025
8/22/2025	9/29/2025	10/10/2025	11/10/2025
8/29/2025	10/6/2025	10/17/2025	11/17/2025
9/5/2025	10/13/2025	10/24/2025	11/24/2025
9/12/2025	10/20/2025	10/31/2025	12/2/2025
9/19/2025	10/20/2025	11/7/2025	12/8/2025
9/26/2025	10/27/2025	11/14/2025	12/15/2025

## Appendix – Report Samples

Our online tool will allow you to compare your results with our national benchmarks, plus a benchmark we will create for the City overall and pulse survey results (i.e., to allow departments/supervisors to analyze their results compared to the overall City-wide results). This tool will allow you to easily select and view any benchmark gap, defined as the difference in the percentage of positive responses, and download results to PDF or Excel.

### Sample Breakout Report Views with 10 or More Responses

This could be a report for a department or supervisor with 10 or more responses – includes levels of engagement and demographic drill-down expansions.





Sample Breakout Report with 5 to 9 Responses

This could be a report for a small department with 5 to 9 responses. This report does not include levels of engagement and demographic expansions.

PDF and Excel Download Samples

The example below also shows how question-by-question results appear when downloaded into PDF or Excel. The gap column shows the difference in the percentage of positive responses for this organization compared to our benchmarks for government overall (federal, state and local government employees combined).

Survey Report: **Sample Report**

Responses: 460

Benchmark: Government Sector

Question	Negative	Neutral	Positive	Mean	Gap
I like the kind of work I do	5.5%	11.4%	83.2%	4.21	-5
I know what is expected of me on the job	11.1%	10%	78.9%	4	-12
My job makes good use of my skills and abilities	19.2%	14.6%	66.2%	3.7	-14

	A	B	C	D	E	F	G
1	Sample Report						
2	Benchmark: Government Sector						
3	Printed: 12/12/2019						
4							
5	Question	Negative	Neutral	Positive	Mean	Gap from	Category
6	I like the kind of work I do	5.50%	11.40%	83.20%	4.21	-5	My Work
7	I know what is expected of me on the job	11.10%	10%	78.90%	4	-12	My Work
8	My job makes good use of my skills and abilities	19.20%	14.60%	66.20%	3.7	-14	My Work
9	I am sufficiently challenged by my work	20.30%	13.50%	66.20%	3.68	-4	My Work

## Action Plan Recommendations Reports

Our reports will also enable the City and its departments to identify the specific questions to focus on in action planning. We will provide customized recommendations reports for the City overall and for any of the breakouts (as an option). Our recommendations are based on 1) the questions identified as most important in the key driver and stay/leave analyses; or 2) the questions with the largest negative benchmark gaps (i.e., between the department/unit breakout and the City overall). Our online tool also allows users to enter, save and share notes.

Here is an example of recommendations and resources from our recommendations library for a survey question in the “Leadership and Managing Change” survey category.

### Survey Question:

*“When changes are made in my organization, they are usually for the better”*

#### Understanding the Question

Change can create uncertainty and anxiety for employees. This can be particularly true if employees don't feel changes are communicated or managed well, or don't understand why the change is good for them or the organization. Employees will be less apprehensive about change if they believe that changes are positive.

#### Thought Starters

- Have there been recent changes that employees may be responding to?
- What approaches does the organization use to manage and communicate about changes?
- Do managers/supervisors understand their role in communicating about, and help employees adapt to, changes?
- Was there a recent change initiative that went well? What did you learn?
- Was there a recent change initiative that didn't go well? What did you learn?

#### Action Plan Steps

- Develop, communicate and implement a standard change management process.
- Ensure that managers/supervisors understand their key role in communicating about, and implementing, change.
- Help managers/supervisors develop (e.g., through training, coaching, and feedback) develop communication skills.
- Organizations can't over-communicate. Create a communication plan for major changes and then communicate early and often about the changes. Emphasize the reasons for the change.
- Because different employees respond to different forms of communication, use a variety of communication media (e.g., email, meetings, forums, FAQs, posters, website).
- Pay particular attention to reaching out to employees who are more difficult to reach (e.g., who work in the field or on different shifts).
- As much as possible, involve employees in the change process (e.g., solicit their opinions before making changes). If employees feel that their opinions are heard they may be less likely to resist change.

#### Take Action

#### Add Notes:

 Save Notes

## Sample Resources

# Recommendation Library Sample – Leadership and Managing Change

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### *Guides, Templates, Checklists, and Other Resources*

- Prosci. “Resource Center: Explore Our Change Management Resources.” Retrieved from <https://www.prosci.com/resources>
- Society for Human Resource Management. “Managing Organizational Change.” Retrieved from <https://www.shrm.org/resourcesandtools/tools-and-samples/toolkits/pages/managingorganizationalchange.aspx>
- Ramos, D. (2016, December). “Free Change Management Templates.” *Smartsheet*. Retrieved from <https://www.smartsheet.com/free-change-management-templates>
- Template. “Communication Strategy Template - 11+ Word, PDF, Documents Download.” Retrieved from <https://www.template.net/business/word-templates/communication-strategy-template/>

### *Videos*

- TED (2010, May 10). “How great leaders inspire action | Simon Sinek.” *YouTube*. Retrieved from <https://www.youtube.com/watch?v=qp0HIF3Sfl4>
- Kauffman Founders School (2014, July 23). “Leadership and Motivation: Motivating by Autonomy.” *YouTube*. Retrieved from <https://www.youtube.com/watch?v=nnc1hmZLwOY>
- Lyon, A. (2017, May 30). “Leading by Example.” *YouTube*. Retrieved from <https://www.youtube.com/watch?v=WtfnP0c5uPo>
- McKinsey LD (2014, May 20). “McKinsey on Change Management.” *YouTube*. Retrieved from [https://www.youtube.com/watch?v=k69i\\_yAhEcQ](https://www.youtube.com/watch?v=k69i_yAhEcQ)

### *Articles*

- Lavigna, R. (2017, January). “Political Transitions - A Unique Opportunity to Focus on Employee Engagement.” *PA Times*. Retrieved from <http://patimes.org/political-transitions-a-unique-opportunity-focus-employee-engagement/>
- Checinski, M., Dillon, R., Hieronimus, S., & Klier, J. (2019, March). “Putting people at the heart of public-sector transformations.” *McKinsey & Company*. Retrieved from <https://www.mckinsey.com/industries/public-and-social-sector/our-insights/putting-people-at-the-heart-of-public-sector-transformations>
- De Smet, A., Rubenstein, K., Schrah, G., Vierow, M., & Edmondson, A. (2021, February). “Psychological safety and the critical role of leadership development.” *McKinsey & Company*. Retrieved from

<https://www.mckinsey.com/business-functions/organization/our-insights/psychological-safety-and-the-critical-role-of-leadership-development>

- Basford, T. & Schaninger, B. (2016, April). "The four building blocks of change." *McKinsey Quarterly*. Retrieved from <https://www.mckinsey.com/business-functions/organization/our-insights/the-four-building-blocks-of-change>
- Fernandez, S. & Rainey, H. G. (2006, April). "Managing Successful Organizational Change in the Public Sector." *Public Administration Review*. Retrieved from <http://johnjay.ijay.cuny.edu/files/ManagingChange.pdf>
- Ibarra, P. (2017, June). "Curating a Healthy Workplace Culture in Government." *Governing*. Retrieved from <https://www.governing.com/archive/col-curating-healthy-high-performing-culture-government-workforce.html>

## Books

- Kotter, J. P. (2008). *Leading Change*. Harvard Business Review Press. (<https://www.amazon.com/Leading-Change-New-Preface-Author/dp/1422186431>)
- Hiatt, J. M. (2006). *ADKAR: A Model for Change in Business, Government and Our Community*. Prosci Learning Center Publications. (<https://www.amazon.com/ADKAR-Change-Business-Government-Community/dp/1930885504>)
- Kouzes, J. M. & Posner, B. Z. (2017). *The Leadership Challenge: How to Make Extraordinary Things Happen in Organizations*. Jossey-Bass. ([https://www.amazon.com/gp/product/B06XYZR8LZ/ref=dbs\\_a\\_def\\_rwt\\_bibl\\_vppl\\_i0](https://www.amazon.com/gp/product/B06XYZR8LZ/ref=dbs_a_def_rwt_bibl_vppl_i0))
- Ibarra, H. (2015). *Act Like a Leader, Think Like a Leader*. Harvard Business Review Press. ([https://www.amazon.com/Act-Like-Leader-Think/dp/1422184129/ref=tmm\\_hrd\\_swatch\\_0?encoding=UTF8&qid=&sr=](https://www.amazon.com/Act-Like-Leader-Think/dp/1422184129/ref=tmm_hrd_swatch_0?encoding=UTF8&qid=&sr=))
- Whitter, B. (2019). *Employee Experience: Develop a Happy, Productive and Supported Workforce for Exceptional Individual and Business Performance*. Kogan Page. (<https://www.amazon.com/Employee-Experience-Productive-Exceptional-Performance/dp/0749491728>)

# Executive Summary Template

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CPS HR administered the <Client> Employee Engagement Survey online from <DATE> through <DATE>. In total, ###% (###) of employees responded to the survey.

The survey included: ## questions in ## categories, # demographic questions, # questions asking if the employee plans to stay or leave in the next year and their reason why, and # open-ended questions.

Questions and categories included in the survey are based on decades of research on employee engagement, and national public sector employee surveys (U.S., U.K., Canada, Australia). The questions and categories included in the survey aim to explore the factors that contribute to engagement. Some customizations were made to the survey content to meet the <Client>'s needs.

## Engagement

CPS HR designates 6 questions out of the ## questions as an index to calculate and measure engagement. Engagement is defined by CPS HR as the connection between the employee and their organization. Engagement goes beyond job satisfaction. Engaged employees are proud to work for their organization, recommend it as a good place to work, and are deeply committed to its success.

Based on the responses to the six index questions, we calculated a mean engagement score (between 1 and 5) for each employee. We then calculated the percentage of employees at each engagement level: fully engaged (mean score above 4), somewhat engaged (mean score between 3 and 4), or not engaged (mean score of 3 or below).

- ### of <Client> employees are “fully engaged,” ##% are “somewhat engaged” and ##% are “not engaged.”
- The overall percentage of fully engaged employees in the <Client> (##%) is <<above/below>> CPS HR’s national benchmarks<sup>1</sup> for the government sector overall (##%) and private sector (##%).
- The <Client>’s percentage of fully engaged employees (##%) is << above/below>> CPS HR’s local government<sup>2</sup> (##%) benchmark.

## Drivers of Engagement

It is also important to understand which survey categories and questions most influence the employee engagement score. CPS HR uses a combination of “weights” through a statistical analysis<sup>3</sup> of the <Client>’s results, and the percentage of positive scores (percentage of agree or strongly agree) to determine the “drivers” of engagement. The “key drivers” of engagement are the categories and questions that, if improved or maintained, are likely to have the greatest impact on employee engagement.

### Key Drivers of Engagement – Categories

<LIST>

### Key Drivers of Engagement – Questions – Areas for Improvement

The following questions have a high weight (strong relationship with engagement) yet a relatively low score based on survey responses (below 65% positive):

- “QUESTION” - ##% agree or strongly agree
- “QUESTION” - ##% agree or strongly agree
- “QUESTION” - ##% agree or strongly agree

### Key Drivers of Engagement – Questions – Areas to Maintain

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<sup>1</sup> CPS HR’s benchmarks are from a national poll designed to represent employees in the private sector, government sector, and each level of government (federal, state, and local) in a wide variety of industries. The most recent biennial poll was conducted in November 2023.

<sup>2</sup> CPS HR’s local government benchmark includes employees from across the U.S. in municipal government (cities/counties) and special districts (such as water and fire districts). Employees in this benchmark hold a range of occupations (e.g., public administration, public health, social services, courts, transportation, corrections).

<sup>3</sup> CPS HR used a type of regression analysis called relative weights or relative importance analysis.



The following questions have a high weight (strong relationship with engagement) and a relatively high score based on survey responses (above 65% positive):

- “QUESTION” - ##% agree or strongly agree
- “QUESTION” - ##% agree or strongly agree
- “QUESTION” - ##% agree or strongly agree

### Stay/Leave Differentiators

The following questions revealed large differences between those who plan to stay and those who plan to leave.

<LIST>

### CPS HR Recommendations

<LIST>



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

6/25/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must have **ADDITIONAL INSURED** provisions or be endorsed. If **SUBROGATION IS WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Edgewood Partners Ins. Center 10877 White Rock Road Suite 300 Sacramento - P&C Lic #0B29370 Rancho Cordova CA 95670	<b>CONTACT</b> NAME: Brianna Orzechowski PHONE (A/C, No. Ext): E-MAIL: brianna.orzechowski@epicbrokers.com ADDRESS:	<b>FAX</b> (A/C, No):
<b>INSURER(S) AFFORDING COVERAGE</b>		<b>NAIC #</b>
INSURER A: Hartford Fire Insurance Company		19682
INSURER B: Sentinel Insurance Company, Ltd.		11000
INSURER C: Hartford Casualty Insurance Company		29424
INSURER D: Trumbull Insurance Company		27120
INSURER E: Lloyd's of London		85202
INSURER F:		

**COVERAGES**

CERTIFICATE NUMBER: 1418989

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	Y	Y	57UUNBE6937	7/1/2024	7/1/2025	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
D	<input type="checkbox"/> <b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY	Y	Y	57UENBE6965	7/1/2024	7/1/2025	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
C	<input checked="" type="checkbox"/> <b>UMBRELLA LIAB</b> <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ \$10,000			57RHUBE7777	7/1/2024	7/1/2025	EACH OCCURRENCE \$ 6,000,000 AGGREGATE \$ 6,000,000 \$
B	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N <input checked="" type="checkbox"/> N	N/A	57WEBF5WNL	7/1/2024	7/1/2025	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER Stop Gap Applies E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
E	Errors & Omissions Claims Made/Retro Date 10/13/1989			PSN0239993974	7/1/2024	7/1/2025	Each Claim/Agg Deductible/Each Claim \$3,000,000 \$50,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Re: Evidence of Coverage.

**CERTIFICATE HOLDER****CANCELLATION**

\*\*Evidence of Coverage\*\*  
For Insured's Use

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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with respect to duties as such. That representative will have all your rights and duties under this Coverage Part.

**e. Unnamed Subsidiary**

Any subsidiary, and subsidiary thereof, of yours which is a legally incorporated entity of which you own a financial interest of more than 50% of the voting stock on the effective date of the Coverage Part.

The insurance afforded herein for any subsidiary not named in this Coverage Part as a named insured does not apply to injury or damage with respect to which such insured is also a named insured under another policy or would be a named insured under such policy but for its termination or the exhaustion of its limits of insurance.

**3. Newly Acquired Or Formed Organization**

Any organization you newly acquire or form, other than a partnership, joint venture or limited liability company, and over which you maintain financial interest of more than 50% of the voting stock, will qualify as a Named Insured if there is no other similar insurance available to that organization. However:

- a. Coverage under this provision is afforded only until the 180th day after you acquire or form the organization or the end of the policy period, whichever is earlier;
- b. Coverage **A** does not apply to "bodily injury" or "property damage" that occurred before you acquired or formed the organization; and
- c. Coverage **B** does not apply to "personal and advertising injury" arising out of an offense committed before you acquired or formed the organization.

**4. Nonowned Watercraft**

With respect to watercraft you do not own that is less than 51 feet long and is not being used to carry persons for a charge, any person is an insured while operating such watercraft with your permission. Any other person or organization responsible for the conduct of such person is also an insured, but only with respect to liability arising out of the operation of the watercraft, and only if no other insurance of any kind is available to that person or organization for this liability.

However, no person or organization is an insured with respect to:

- a. "Bodily injury" to a co-"employee" of the person operating the watercraft; or
- b. "Property damage" to property owned by, rented to, in the charge of or occupied by you or the employer of any person who is an insured under this provision.

**5. Additional Insureds When Required By Written Contract, Written Agreement Or Permit**

The following person(s) or organization(s) are an additional insured when you have agreed, in a written contract, written agreement or because of a permit issued by a state or political subdivision, that such person or organization be added as an additional insured on your policy, provided the injury or damage occurs subsequent to the execution of the contract or agreement.

A person or organization is an additional insured under this provision only for that period of time required by the contract or agreement.

However, no such person or organization is an insured under this provision if such person or organization is included as an insured by an endorsement issued by us and made a part of this Coverage Part.

**a. Vendors**

Any person(s) or organization(s) (referred to below as vendor), but only with respect to "bodily injury" or "property damage" arising out of "your products" which are distributed or sold in the regular course of the vendor's business and only if this Coverage Part provides coverage for "bodily injury" or "property damage" included within the "products-completed operations hazard".

- (1) The insurance afforded the vendor is subject to the following additional exclusions:

This insurance does not apply to:

- (a) "Bodily injury" or "property damage" for which the vendor is obligated to pay damages by reason of the assumption of liability in a contract or agreement. This exclusion does not apply to liability for damages that the vendor would have in the absence of the contract or agreement;
- (b) Any express warranty unauthorized by you;
- (c) Any physical or chemical change in the product made intentionally by the vendor;
- (d) Repackaging, except when unpacked solely for the purpose of inspection, demonstration, testing, or the substitution of parts under instructions from the manufacturer, and then repackaged in the original container;
- (e) Any failure to make such inspections, adjustments, tests or servicing as the vendor has agreed to make or normally

undertakes to make in the usual course of business, in connection with the distribution or sale of the products;

- (f) Demonstration, installation, servicing or repair operations, except such operations performed at the vendor's premises in connection with the sale of the product;
  - (g) Products which, after distribution or sale by you, have been labeled or relabeled or used as a container, part or ingredient of any other thing or substance by or for the vendor; or
  - (h) "Bodily injury" or "property damage" arising out of the sole negligence of the vendor for its own acts or omissions or those of its employees or anyone else acting on its behalf. However, this exclusion does not apply to:
    - (i) The exceptions contained in Sub-paragraphs (d) or (f); or
    - (ii) Such inspections, adjustments, tests or servicing as the vendor has agreed to make or normally undertakes to make in the usual course of business, in connection with the distribution or sale of the products.
- (2) This insurance does not apply to any insured person or organization, from whom you have acquired such products, or any ingredient, part or container, entering into, accompanying or containing such products.

#### **b. Lessors Of Equipment**

- (1) Any person(s) or organization(s) from whom you lease equipment; but only with respect to their liability for "bodily injury", "property damage" or "personal and advertising injury" caused, in whole or in part, by your maintenance, operation or use of equipment leased to you by such person(s) or organization(s).
- (2) With respect to the insurance afforded to these additional insureds this insurance does not apply to any "occurrence" which takes place after the equipment lease expires.

#### **c. Lessors Of Land Or Premises**

Any person or organization from whom you lease land or premises, but only with respect to liability arising out of the ownership, maintenance or use of that part of the land or premises leased to you.

With respect to the insurance afforded these additional insureds the following additional exclusions apply:

This insurance does not apply to:

- 1. Any "occurrence" which takes place after you cease to lease that land; or
- 2. Structural alterations, new construction or demolition operations performed by or on behalf of such person or organization.

#### **d. Architects, Engineers Or Surveyors**

Any architect, engineer, or surveyor, but only with respect to liability for "bodily injury", "property damage" or "personal and advertising injury" caused, in whole or in part, by your acts or omissions or the acts or omissions of those acting on your behalf:

- (1) In connection with your premises; or
- (2) In the performance of your ongoing operations performed by you or on your behalf.

With respect to the insurance afforded these additional insureds, the following additional exclusion applies:

This insurance does not apply to "bodily injury", "property damage" or "personal and advertising injury" arising out of the rendering of or the failure to render any professional services by or for you, including:

- 1. The preparing, approving, or failing to prepare or approve, maps, shop drawings, opinions, reports, surveys, field orders, change orders or drawings and specifications; or
- 2. Supervisory, inspection, architectural or engineering activities.

This exclusion applies even if the claims against any insured allege negligence or other wrongdoing in the supervision, hiring, employment, training or monitoring of others by that insured, if the "occurrence" which caused the "bodily injury" or "property damage", or the offense which caused the "personal and advertising injury", involved the rendering of or the failure to render any professional services by or for you.

#### **e. Permits Issued By State Or Political Subdivisions**

Any state or political subdivision, but only with respect to operations performed by you or on your behalf for which the state or political subdivision has issued a permit.

With respect to the insurance afforded these additional insureds, this insurance does not apply to:

- (1) "Bodily injury", "property damage" or "personal and advertising injury" arising out of operations performed for the state or municipality; or

- (2) "Bodily injury" or "property damage" included within the "products-completed operations hazard".

**f. Any Other Party**

Any other person or organization who is not an additional insured under Paragraphs **a.** through **e.** above, but only with respect to liability for "bodily injury", "property damage" or "personal and advertising injury" caused, in whole or in part, by your acts or omissions or the acts or omissions of those acting on your behalf:

- (1) In the performance of your ongoing operations;
- (2) In connection with your premises owned by or rented to you; or
- (3) In connection with "your work" and included within the "products-completed operations hazard", but only if
  - (a) The written contract or agreement requires you to provide such coverage to such additional insured; and
  - (b) This Coverage Part provides coverage for "bodily injury" or "property damage" included within the "products-completed operations hazard".

However:

- (1) The insurance afforded to such additional insured only applies to the extent permitted by law; and
- (2) If coverage provided to the additional insured is required by a contract or agreement, the insurance afforded to such additional insured will not be broader than that which you are required by the contract or agreement to provide for such additional insured.

With respect to the insurance afforded to these additional insureds, this insurance does not apply to:

"Bodily injury", "property damage" or "personal and advertising injury" arising out of the rendering of, or the failure to render, any professional architectural, engineering or surveying services, including:

- (1) The preparing, approving, or failing to prepare or approve, maps, shop drawings, opinions, reports, surveys, field orders, change orders or drawings and specifications; or
- (2) Supervisory, inspection, architectural or engineering activities.

This exclusion applies even if the claims against any insured allege negligence or other wrongdoing in the supervision, hiring, employment, training or monitoring of others

by that insured, if the "occurrence" which caused the "bodily injury" or "property damage", or the offense which caused the "personal and advertising injury", involved the rendering of or the failure to render any professional services by or for you.

The limits of insurance that apply to additional insureds is described in Section **III** – Limits Of Insurance.

How this insurance applies when other insurance is available to the additional insured is described in the Other Insurance Condition in Section **IV** – Commercial General Liability Conditions.

No person or organization is an insured with respect to the conduct of any current or past partnership, joint venture or limited liability company that is not shown as a Named Insured in the Declarations.

**SECTION III – LIMITS OF INSURANCE**

**1. The Most We Will Pay**

The Limits of Insurance shown in the Declarations and the rules below fix the most we will pay regardless of the number of:

- a. Insureds;
- b. Claims made or "suits" brought; or
- c. Persons or organizations making claims or bringing "suits".

**2. General Aggregate Limit**

The General Aggregate Limit is the most we will pay for the sum of:

- a. Medical expenses under Coverage **C**;
- b. Damages under Coverage **A**, except damages because of "bodily injury" or "property damage" included in the "products-completed operations hazard"; and
- c. Damages under Coverage **B**.

**3. Products-Completed Operations Aggregate Limit**

The Products-Completed Operations Aggregate Limit is the most we will pay under Coverage **A** for damages because of "bodily injury" and "property damage" included in the "products-completed operations hazard".

**4. Personal And Advertising Injury Limit**

Subject to **2.** above, the Personal and Advertising Injury Limit is the most we will pay under Coverage **B** for the sum of all damages because of all "personal and advertising injury" sustained by any one person or organization.

**5. Each Occurrence Limit**

Subject to **2.** or **3.** above, whichever applies, the Each Occurrence Limit is the most we will pay for the sum of:

- a. Damages under Coverage **A**; and



contract or written agreement that this insurance is primary and non-contributory with the additional insured's own insurance.

**f. Knowledge Of An Occurrence, Offense, Claim Or Suit**

Paragraphs **a.** and **b.** apply to you or to any additional insured only when such "occurrence", offense, claim or "suit" is known to:

- (1) You or any additional insured that is an individual;
- (2) Any partner, if you or the additional insured is a partnership;
- (3) Any manager, if you or the additional insured is a limited liability company;
- (4) Any "executive officer" or insurance manager, if you or the additional insured is a corporation;
- (5) Any trustee, if you or the additional insured is a trust; or
- (6) Any elected or appointed official, if you or the additional insured is a political subdivision or public entity.

This duty applies separately to you and any additional insured.

**3. Legal Action Against Us**

No person or organization has a right under this Coverage Part:

- a.** To join us as a party or otherwise bring us into a "suit" asking for damages from an insured; or
- b.** To sue us on this Coverage Part unless all of its terms have been fully complied with.

A person or organization may sue us to recover on an agreed settlement or on a final judgment against an insured; but we will not be liable for damages that are not payable under the terms of this Coverage Part or that are in excess of the applicable limit of insurance. An agreed settlement means a settlement and release of liability signed by us, the insured and the claimant or the claimant's legal representative.

**4. Other Insurance**

If other valid and collectible insurance is available to the insured for a loss we cover under Coverages **A** or **B** of this Coverage Part, our obligations are limited as follows:

**a. Primary Insurance**

This insurance is primary except when **b.** below applies. If other insurance is also primary, we will share with all that other insurance by the method described in **c.** below.

**b. Excess Insurance**

This insurance is excess over any of the other insurance, whether primary, excess, contingent or on any other basis:

**(1) Your Work**

That is Fire, Extended Coverage, Builder's Risk, Installation Risk or similar coverage for "your work";

**(2) Premises Rented To You**

That is fire, lightning or explosion insurance for premises rented to you or temporarily occupied by you with permission of the owner;

**(3) Tenant Liability**

That is insurance purchased by you to cover your liability as a tenant for "property damage" to premises rented to you or temporarily occupied by you with permission of the owner;

**(4) Aircraft, Auto Or Watercraft**

If the loss arises out of the maintenance or use of aircraft, "autos" or watercraft to the extent not subject to Exclusion g. of Section **I** – Coverage **A** – Bodily Injury And Property Damage Liability;

**(5) Property Damage To Borrowed Equipment Or Use Of Elevators**

If the loss arises out of "property damage" to borrowed equipment or the use of elevators to the extent not subject to Exclusion j. of Section **I** - Coverage **A** - Bodily Injury And Property Damage Liability;

**(6) When You Are Added As An Additional Insured To Other Insurance**

Any other insurance available to you covering liability for damages arising out of the premises or operations, or products and completed operations, for which you have been added as an additional insured by that insurance; or

**(7) When You Add Others As An Additional Insured To This Insurance**

Any other insurance available to an additional insured.

However, the following provisions apply to other insurance available to any person or organization who is an additional insured under this coverage part.

**(a) Primary Insurance When Required By Contract**

This insurance is primary if you have agreed in a written contract or written agreement that this insurance be primary. If other insurance is also

primary, we will share with all that other insurance by the method described in c. below.

**(b) Primary And Non-Contributory To Other Insurance When Required By Contract**

If you have agreed in a written contract, written agreement, or permit that this insurance is primary and non-contributory with the additional insured's own insurance, this insurance is primary and we will not seek contribution from that other insurance.

Paragraphs (a) and (b) do not apply to other insurance to which the additional insured has been added as an additional insured.

When this insurance is excess, we will have no duty under Coverages A or B to defend the insured against any "suit" if any other insurer has a duty to defend the insured against that "suit". If no other insurer defends, we will undertake to do so, but we will be entitled to the insured's rights against all those other insurers.

When this insurance is excess over other insurance, we will pay only our share of the amount of the loss, if any, that exceeds the sum of:

- (1) The total amount that all such other insurance would pay for the loss in the absence of this insurance; and
- (2) The total of all deductible and self-insured amounts under all that other insurance.

We will share the remaining loss, if any, with any other insurance that is not described in this Excess Insurance provision and was not bought specifically to apply in excess of the Limits of Insurance shown in the Declarations of this Coverage Part.

**c. Method Of Sharing**

If all of the other insurance permits contribution by equal shares, we will follow this method also. Under this approach each insurer contributes equal amounts until it has paid its applicable limit of insurance or none of the loss remains, whichever comes first.

If any of the other insurance does not permit contribution by equal shares, we will contribute by limits. Under this method, each insurer's share is based on the ratio of its applicable limit of insurance to the total applicable limits of insurance of all insurers.

**5. Premium Audit**

- a. We will compute all premiums for this Coverage Part in accordance with our rules and rates.
- b. Premium shown in this Coverage Part as advance premium is a deposit premium only. At the close of each audit period we will compute the earned premium for that period and send notice to the first Named Insured. The due date for audit and retrospective premiums is the date shown as the due date on the bill. If the sum of the advance and audit premiums paid for the policy period is greater than the earned premium, we will return the excess to the first Named Insured.
- c. The first Named Insured must keep records of the information we need for premium computation, and send us copies at such times as we may request.

**6. Representations**

**a. When You Accept This Policy**

By accepting this policy, you agree:

- (1) The statements in the Declarations are accurate and complete;
- (2) Those statements are based upon representations you made to us; and
- (3) We have issued this policy in reliance upon your representations.

**b. Unintentional Failure To Disclose Hazards**

If unintentionally you should fail to disclose all hazards relating to the conduct of your business that exist at the inception date of this Coverage Part, we shall not deny coverage under this Coverage Part because of such failure.

**7. Separation Of Insureds**

Except with respect to the Limits of Insurance, and any rights or duties specifically assigned in this Coverage Part to the first Named Insured, this insurance applies:

- a. As if each Named Insured were the only Named Insured; and
- b. Separately to each insured against whom claim is made or "suit" is brought.

**8. Transfer Of Rights Of Recovery Against Others To Us**

**a. Transfer Of Rights Of Recovery**

If the insured has rights to recover all or part of any payment, including Supplementary Payments, we have made under this Coverage Part, those rights are transferred to us. The insured must do nothing after loss to

impair them. At our request, the insured will bring "suit" or transfer those rights to us and help us enforce them.

**b. Waiver Of Rights Of Recovery (Waiver Of Subrogation)**

If the insured has waived any rights of recovery against any person or organization for all or part of any payment, including Supplementary Payments, we have made under this Coverage Part, we also waive that right, provided the insured waived their rights of recovery against such person or organization in a contract, agreement or permit that was executed prior to the injury or damage.

**9. When We Do Not Renew**

If we decide not to renew this Coverage Part, we will mail or deliver to the first Named Insured shown in the Declarations written notice of the nonrenewal not less than 30 days before the expiration date.

If notice is mailed, proof of mailing will be sufficient proof of notice.

**SECTION V – DEFINITIONS**

**1. "Advertisement"** means the widespread public dissemination of information or images that has the purpose of inducing the sale of goods, products or services through:

- a. (1) Radio;
- (2) Television;
- (3) Billboard;
- (4) Magazine;
- (5) Newspaper; or
- b. Any other publication that is given widespread public distribution.

However, "advertisement" does not include:

- a. The design, printed material, information or images contained in, on or upon the packaging or labeling of any goods or products; or
- b. An interactive conversation between or among persons through a computer network.

**2. "Advertising idea"** means any idea for an "advertisement".

**3. "Asbestos hazard"** means an exposure or threat of exposure to the actual or alleged properties of asbestos and includes the mere presence of asbestos in any form.

**4. "Auto"** means:

- a. A land motor vehicle, trailer or semitrailer designed for travel on public roads, including any attached machinery or equipment; or
- b. Any other land vehicle that is subject to a compulsory or financial responsibility law or

other motor vehicle insurance law where it is licensed or principally garaged.

However, "auto" does not include "mobile equipment".

**5. "Bodily injury"** means physical:

- a. Injury;
- b. Sickness; or
- c. Disease

sustained by a person and, if arising out of the above, mental anguish or death at any time.

**6. "Coverage territory"** means:

- a. The United States of America (including its territories and possessions), Puerto Rico and Canada;
- b. International waters or airspace, but only if the injury or damage occurs in the course of travel or transportation between any places included in a. above; or
- c. All other parts of the world if the injury or damage arises out of:
  - (1) Goods or products made or sold by you in the territory described in a. above;
  - (2) The activities of a person whose home is in the territory described in a. above, but is away for a short time on your business; or
  - (3) "Personal and advertising injury" offenses that take place through the Internet or similar electronic means of communication

provided the insured's responsibility to pay damages is determined in the United States of America (including its territories and possessions), Puerto Rico or Canada, in a "suit" on the merits according to the substantive law in such territory or in a settlement we agree to.

**7. "Employee"** includes a "leased worker". "Employee" does not include a "temporary worker".

**8. "Employment-Related Practices"** means:

- a. Refusal to employ that person;
- b. Termination of that person's employment; or
- c. Employment-related practices, policies, acts or omissions, such as coercion, demotion, evaluation, reassignment, discipline, defamation, harassment, humiliation, discrimination or malicious prosecution directed at that person.

**9. "Executive officer"** means a person holding any of the officer positions created by your charter, constitution, by-laws or any other similar governing document.

**10. "Hostile fire"** means one which becomes uncontrollable or breaks out from where it was intended to be.



**THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.**

## **COMMERCIAL AUTOMOBILE BROAD FORM ENDORSEMENT**

This endorsement modifies insurance provided under the following:

### **BUSINESS AUTO COVERAGE FORM**

To the extent that the provisions of this endorsement provide broader benefits to the "insured" than other provisions of the Coverage Form, the provisions of this endorsement apply.

#### **1. BROAD FORM INSURED**

**Paragraph .1. - WHO IS AN INSURED - of Section II - Liability Coverage is amended to add the following:**

##### **d. Subsidiaries and Newly Acquired or Formed Organizations**

The Named Insured shown in the Declarations is amended to include:

- (1) Any legal business entity other than a partnership or joint venture, formed as a subsidiary in which you have an ownership interest of more than 50% on the effective date of the Coverage Form. However, the Named Insured does not include any subsidiary that is an "insured" under any other automobile policy or would be an "insured" under such a policy but for its termination or the exhaustion of its Limit of Insurance.
- (2) Any organization that is acquired or formed by you and over which you maintain majority ownership. However, the Named Insured does not include any newly formed or acquired organization:
  - (a) That is a partnership or joint venture,
  - (b) That is an "insured" under any other policy,
  - (c) That has exhausted its Limit of Insurance under any other policy, or
  - (d) 180 days or more after its acquisition or formation by you, unless you have given us notice of the acquisition or formation.

Coverage does not apply to "bodily injury" or "property damage" that results from an "accident" that occurred before you formed or acquired the organization.

##### **e. Employees as Insureds**

- (1). Any "employee" of yours while using a covered "auto" you don't own, hire or borrow in your business or your personal affairs.

##### **f. Lessors as Insureds**

- (1). The lessor of a covered "auto" while the "auto" is leased to you under a written agreement if:
  - (a) The agreement requires you to provide direct primary insurance for the lessor and
  - (b) The "auto" is leased without a driver.

Such a leased "auto" will be considered a covered "auto" you own and not a covered "auto" you hire.

##### **g. Additional Insured if Required by Contract**

- (1) When you have agreed, in a written contract or written agreement, that a person or organization be added as an additional insured on your business auto policy, such person or organization is an "insured", but only to the extent such person or organization is liable for "bodily injury" or "property damage" caused by the conduct of an "insured" under paragraphs a. or b. of Who Is An Insured with regard to the ownership, maintenance or use of a covered "auto."

The insurance afforded to any such additional insured applies only if the "bodily injury" or "property damage" occurs:

- (a) During the policy period, and
- (b) Subsequent to the execution of such written contract, and

- (c) Prior to the expiration of the period of time that the written contract requires such insurance be provided to the additional insured.

(2) How Limits Apply

If you have agreed in a written contract or written agreement that another person or organization be added as an additional insured on your policy, the most we will pay on behalf of such additional insured is the lesser of:

- (a) The limits of insurance specified in the written contract or written agreement; or
- (b) The Limits of Insurance shown in the Declarations.

Such amount shall be a part of and not in addition to Limits of Insurance shown in the Declarations and described in this Section.

(3) Additional Insureds Other Insurance

If we cover a claim or "suit" under this Coverage Part that may also be covered by other insurance available to an additional insured, such additional insured must submit such claim or "suit" to the other insurer for defense and indemnity.

However, this provision does not apply to the extent that you have agreed in a written contract or written agreement that this insurance is primary and non-contributory with the additional insured's own insurance.

(4) Duties in The Event Of Accident, Claim, Suit or Loss

If you have agreed in a written contract or written agreement that another person or organization be added as an additional insured on your policy, the additional insured shall be required to comply with the provisions in LOSS CONDITIONS 2. - DUTIES IN THE EVENT OF ACCIDENT, CLAIM, SUIT OR LOSS – OF SECTION IV – BUSINESS AUTO CONDITIONS, in the same manner as the Named Insured.

**2. Primary and Non-Contributory if Required by Contract**

Only with respect to insurance provided to an additional insured in A.1.g. - Additional Insured If Required by Contract, the following provisions apply:

- (1) Primary Insurance When Required By Contract

This insurance is primary if you have agreed in a written contract or written agreement that this insurance be primary. If other insurance is also primary, we will share with all that other insurance by the method described in Other Insurance 5.d.

(2) Primary And Non-Contributory To Other Insurance When Required By Contract

If you have agreed in a written contract or written agreement that this insurance is primary and non-contributory with the additional insured's own insurance, this insurance is primary and we will not seek contribution from that other insurance.

Paragraphs (1) and (2) do not apply to other insurance to which the additional insured has been added as an additional insured.

When this insurance is excess, we will have no duty to defend the insured against any "suit" if any other insurer has a duty to defend the insured against that "suit". If no other insurer defends, we will undertake to do so, but we will be entitled to the insured's rights against all those other insurers.

When this insurance is excess over other insurance, we will pay only our share of the amount of the loss, if any, that exceeds the sum of:

- (1) The total amount that all such other insurance would pay for the loss in the absence of this insurance; and
- (2) The total of all deductible and self-insured amounts under all that other insurance.

We will share the remaining loss, if any, by the method described in SECTION IV- Business Auto Conditions, B. General Conditions, Other Insurance 5.d.

**3. AUTOS RENTED BY EMPLOYEES**

Any "auto" hired or rented by your "employee" on your behalf and at your direction will be considered an "auto" you hire.

The SECTION IV- Business Auto Conditions, B. General Conditions, 5. OTHER INSURANCE Condition is amended by adding the following:

- e. If an "employee's" personal insurance also applies on an excess basis to a covered "auto" hired or rented by your "employee" on your behalf and at your direction, this insurance will be primary to the "employee's" personal insurance.

- (1) Permanently installed in or upon the covered "auto" in a housing, opening or other location that is not normally used by the "auto" manufacturer for the installation of such equipment;
- (2) Removable from a permanently installed housing unit as described in Paragraph 2.a. above or is an integral part of that equipment; or
- (3) An integral part of such equipment.

c. For each covered "auto", should loss be limited to electronic equipment only, our obligation to pay for, repair, return or replace damaged or stolen electronic equipment will be reduced by the applicable deductible shown in the Declarations, or \$250, whichever deductible is less.

#### **10. EXTRA EXPENSE - BROADENED COVERAGE**

Under Paragraph A. - COVERAGE - of SECTION III - PHYSICAL DAMAGE COVERAGE, we will pay for the expense of returning a stolen covered "auto" to you.

#### **11. GLASS REPAIR - WAIVER OF DEDUCTIBLE**

Under Paragraph D. - DEDUCTIBLE - of SECTION III - PHYSICAL DAMAGE COVERAGE, the following is added:

No deductible applies to glass damage if the glass is repaired rather than replaced.

#### **12. TWO OR MORE DEDUCTIBLES**

Under Paragraph D. - DEDUCTIBLE - of SECTION III - PHYSICAL DAMAGE COVERAGE, the following is added:

If another Hartford Financial Services Group, Inc. company policy or coverage form that is not an automobile policy or coverage form applies to the same "accident", the following applies:

- (1) If the deductible under this Business Auto Coverage Form is the smaller (or smallest) deductible, it will be waived;
- (2) If the deductible under this Business Auto Coverage Form is not the smaller (or smallest) deductible, it will be reduced by the amount of the smaller (or smallest) deductible.

#### **13. AMENDED DUTIES IN THE EVENT OF ACCIDENT, CLAIM, SUIT OR LOSS**

The requirement in LOSS CONDITIONS 2.a. - DUTIES IN THE EVENT OF ACCIDENT, CLAIM, SUIT OR LOSS - of SECTION IV - BUSINESS AUTO CONDITIONS that you must notify us of an "accident" applies only when the "accident" is known to:

- (1) You, if you are an individual;

- (2) A partner, if you are a partnership;
- (3) A member, if you are a limited liability company; or
- (4) An executive officer or insurance manager, if you are a corporation.

#### **14. UNINTENTIONAL FAILURE TO DISCLOSE HAZARDS**

If you unintentionally fail to disclose any hazards existing at the inception date of your policy, we will not deny coverage under this Coverage Form because of such failure.

#### **15. HIRED AUTO - COVERAGE TERRITORY**

SECTION IV, BUSINESS AUTO CONDITIONS, PARAGRAPH B, GENERAL CONDITIONS, 7. - POLICY PERIOD, COVERAGE TERRITORY - is added to include the following:

- (6) For short-term hired "autos", the coverage territory with respect to Liability Coverage is anywhere in the world provided that if the "insured's" responsibility to pay damages for "bodily injury" or "property damage" is determined in a "suit," the "suit" is brought in the United States of America, the territories and possessions of the United States of America, Puerto Rico or Canada or in a settlement we agree to.

#### **16. WAIVER OF SUBROGATION**

Paragraph 5. TRANSFER OF RIGHTS OF RECOVERY AGAINST OTHERS TO US - of SECTION IV - BUSINESS AUTO CONDITIONS A. Loss Conditions is amended by adding the following:

We waive any right of recovery we may have against any person or organization with whom you have a written contract that requires such waiver because of payments we make for damages under this Coverage Form.

#### **17. RESULTANT MENTAL ANGUISH COVERAGE**

The definition of "bodily injury" in SECTION V-DEFINITIONS, C. is replaced by the following:

"Bodily injury" means bodily injury, sickness or disease sustained by any person, including mental anguish or death resulting from any of these.

#### **18. EXTENDED CANCELLATION CONDITION**

Paragraph 2. of the COMMON POLICY CONDITIONS - CANCELLATION - applies except as follows:

If we cancel for any reason other than nonpayment of premium, we will mail or deliver to the first Named Insured written notice of cancellation at least 60 days before the effective date of cancellation.



**THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.**

## **WAIVER OF OUR RIGHT TO RECOVER FROM OTHERS ENDORSEMENT - CALIFORNIA**

Endorsement Number:

**Policy Number:** 57WEBF5WNL

**Effective Date:** 7/1/2024

Effective hour is the same as stated on the Information Page of the policy.

**Named Insured and Address:**

Cooperative Personnel Services  
dba: CPS HR Consulting  
2450 Del Paso Road, Suite 220  
Sacramento, CA 95834

We have the right to recover our payments from anyone liable for an injury covered by this policy. We will not enforce our right against the person or organization named in the Schedule. (This agreement applies only to the extent that you perform work under a written contract that requires you to obtain this agreement from us.)

You must maintain payroll records accurately segregating the remuneration of your employees while engaged in the work described in the Schedule.

The additional premium for this endorsement shall be \_\_\_\_\_ % of the California workers' compensation premium otherwise due on such remuneration.

### **SCHEDULE**

**Person or Organization**

**Job Description**

Any person or organization for whom you are required by contract or agreement to obtain this waiver from us. Endorsement is not applicable in KY, NH, NJ or for any MO construction risk

Countersigned by \_\_\_\_\_  
Authorized Representative

**THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.**

**WAIVER OF OUR RIGHT TO RECOVER  
FROM OTHERS ENDORSEMENT**

**Policy Number:** 57WEBF5WNL

**Endorsement Number:**

**Effective Date:** 7/1/2024

Effective hour is the same as stated on the Information Page of the policy.

**Named Insured and Address:**

**Cooperative Personnel Services**

**dba: CPS HR Consulting**

**2450 Del Paso Road, Suite 220**

**Sacramento, CA 95834**

We have the right to recover our payments from anyone liable for an injury covered by this policy. We will not enforce our right against the person or organization named in the Schedule.

This agreement shall not operate directly or indirectly to benefit anyone not named in the Schedule.

**SCHEDULE**

Any person or organization for whom you are required by contract or agreement to obtain this waiver from us. Endorsement is not applicable in KY, NH, NJ or for any MO construction risk

Countersigned by \_\_\_\_\_  
Authorized Representative



**THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.**

## **NOTICE OF CANCELLATION TO CERTIFICATE HOLDER(S)**

This policy is subject to the following additional Conditions:

- A.** If this policy is cancelled by the Company, other than for nonpayment of premium, notice of such cancellation will be provided at least thirty (30) days in advance of the cancellation effective date to the certificate holder(s) with mailing addresses on file with the agent of record or the Company.
- B.** If this policy is cancelled by the Company for nonpayment of premium, or by the insured, notice of such cancellation will be provided within (10) days of the cancellation effective date to the certificate holder(s) with mailing addresses on file with the agent of record or the Company.

If notice is mailed, proof of mailing to the last known mailing address of the certificate holder(s) on file with the agent of record or the Company will be sufficient proof of notice.

Any notification rights provided by this endorsement apply only to active certificate holder(s) who were issued a certificate of insurance applicable to this policy's term.

Failure to provide such notice to the certificate holder(s) will not amend or extend the date the cancellation becomes effective, nor will it negate cancellation of the policy. Failure to send notice shall impose no liability of any kind upon the Company or its agents or representatives.





**Consultant Services for Workplace Climate Survey  
City of Mt. Pleasant, Michigan**

# PROPOSAL

# ABOUT CGR

CGR (Center for Governmental Research) is a nonprofit consulting organization that has been creating positive change in communities for over 100 years. We specialize in analytic and strategic services to the public and philanthropic sectors, helping organizations figure out complex issues and develop solutions.

## How We Work

Change is never easy. CGR informs the process of change with insightful information and draws on our experience to increase the likelihood of success. We start with an accurate examination of both quantitative and qualitative data, consultation with all relevant stakeholders, examination of options and viewpoints, and processes to resolve conflicts and prioritize solutions. We help clients think through each step of the change process, equipped with the best information available.

## Commitment to Diversity, Equity and Inclusion

At CGR, we know that multiple perspectives make our work better. That's one reason we value diversity from all backgrounds and seek to create an inclusive working environment with equitable policies and outcomes. We strive to create a welcoming workplace that attracts and retains a wide variety of talented people with different perspectives and new ideas. We value diversity among all dimensions of the human experience, including race, color, religion, gender identity and expression, national origin, differing abilities, veterans, socioeconomic status, and sexual orientation. CGR also infuses a DEI lens in our research approaches and collaboration with stakeholders, including clients and community.

### Our Mission

CGR drives positive community change through the highest quality research, analysis, data insights and collaboration.

### Our Vision

Trusted for our rigorous analysis and actionable insights, we can transform any community to be more equitable, strong and thriving.

### Our Values

Collaboration  
Equity  
Inclusion  
Independence  
Integrity  
Respect







## CONTACT INFORMATION

Center for Governmental Research (CGR)  
1 South Washington Street, Suite 400  
Rochester, New York 14614

[www.cgr.org](http://www.cgr.org)

Main number: 585-325-6360

### **Proposal Contact Information**

**Paul A Bishop, M.P.A., Principal**

Center for Governmental Research (CGR)  
1 South Washington Street, Suite 400  
Rochester, New York 14614

(585) 327- 7068 (direct line)

email: [pbishop@cgr.org](mailto:pbishop@cgr.org)



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# Cover Letter

The Center for Governmental Research (CGR) is pleased to respond to the City of Mt. Pleasant's request for proposals for assistance with conducting a workplace climate survey of all full-time and part-time union and management employees. This engagement requires a consultant with deep expertise in survey design, data gathering and analysis, presentation of findings, and actionable recommendations for change.

As this proposal will demonstrate, CGR is extremely well positioned to deliver the services required for this engagement. Our team of industry experts has substantive experience with survey design and deployment, organizational/workplace climate studies, needs assessments, strategic planning, quantitative and qualitative data collection and analysis, stakeholder engagement, and significant experience working with local governments to improve operations and organizational climate.

CGR would be honored to put our more than 100 years of experience helping organizations and governments with surveys from inception to completion and data-informed needs assessments to work for the City of Mt. Pleasant.

## Firm Information

CGR (Center for Governmental Research Inc.)  
1 South Washington Street  
Suite 400  
Rochester, New York 14614  
(585) 325-6360 (main office)  
[www.cgr.org](http://www.cgr.org)

## Proposal Contact Information

Paul A. Bishop, M.P.A.  
Principal  
(585) 327-7068 (direct line)  
[pbishop@cgr.org](mailto:pbishop@cgr.org)

# Project Approach

We understand that Mt. Pleasant's goals for this organizational climate survey study are to:

- Design and administer a comprehensive workplace climate survey for all full-time and part-time union and management employees of the City of Mt. Pleasant (currently 125 employees);
- Perform individual follow-up interviews, as necessary;
- Analyze the survey responses and prepare a detailed report summarizing key findings, trends, and recommendations for improvement;
- Make recommendations for any training or educational programs based on the findings from the survey analysis to address specific areas of improvement;
- Suggest tools or methodologies for tracking the implementation and impact of recommendations over time; and
- Present findings in the detailed report to the City Commission that maintains the confidentiality of respondents.

The information from the organizational climate survey is aimed at uncovering and addressing opportunities to improve the City's workplace climate.

## Work Plan

Our proposed work plan is provided below. The proposal is designed to make the best use of available resources and leverage existing data to inform steps and strategies for moving forward. That said, this workplace climate survey design is offered as a starting point. We will gladly work with Mt. Pleasant to tailor our approach to meeting prioritized needs. A schedule for this work is provided in the Timeline section later in our proposal under our Staffing plan.

## Project Initiation

CGR will schedule a virtual meeting with Mt. Pleasant leadership to review the goals of the project scope, deliverables and timetable, as well as begin to get to know the municipality better. We will develop a mutually agreeable plan for communication during the project such as biweekly check-ins. CGR will work closely with Mt. Pleasant throughout the process, and its leadership will have the opportunity to review and provide feedback regarding project tasks and deliverables, including survey production, follow-up interview questions/structure (as needed), data cataloging and analysis, and the comprehensive report of the project.

## Baseline Review

CGR will request important information and documents, such as any previously completed workplace surveys and associated participant feedback and previously completed reports (e.g., strategic plans, needs assessments, etc.). We will examine this information to familiarize ourselves with the work the City has completed previously and how this information can be used to inform the City's direction with the survey.

## Survey

### Design and Finalize Online Survey

CGR will develop a draft of an electronic survey to be administered to all City of Mt. Pleasant employees. The survey can gather input on such topics as employee satisfaction, the strengths and weaknesses of departments, staffing adequacy, pay and benefit adequacy, perception of whether work is valued by both management and the public, perception of opportunity for professional development and training, and other related topics. The survey's specific focus and content will be determined in conjunction with Mt. Pleasant leadership.

CGR will ensure that all survey responses remain anonymous, and any potentially identifying information, such as demographics, will only be reported in the aggregate.

CGR has budgeted for the following basic elements in a survey:

- 4 demographic questions (age, race, sex, etc.).
- 12 content questions, including 2 open-ended questions.

Additional items beyond this number can be discussed but may require adjustments to scope and cost.

### Administer Survey and Evaluate Data

Upon finalization of the survey, CGR will work with Mt. Pleasant to distribute the survey to the 125 identified, full-time and part-time union and management City employees. CGR will follow up with employees (via email) to ensure as many responses as possible are received.

It is recommended that Mt. Pleasant provide 2-3 weeks of time for respondents to fill out the survey prior to closing it. CGR suggests that an incentive be offered to encourage participation, such as a drawing for one of 15 \$20 gift cards.

CGR's analysis will include tables and figures that summarize and analyze the responses from the survey, as well as a brief narrative explaining the significance of the data. It is expected that the City of Mt. Pleasant will be interested in evaluating survey results to see if different subgroups of employees provide different answers to the questions in the survey. CGR has budgeted for up to 2 subgroup analyses. These subgroup analyses could include comparisons such as:

- Comparing the responses of front-line employees to the responses of management-level employees.
- Comparing the responses of younger employees (those in the first 1-7 years of their employment) to more veteran employees (those 7+ years in their employment).

Upon completing of survey analysis, and after consultation with Mt. Pleasant, CGR will conduct up to 10 follow-up interviews or small group sessions virtually, if necessary, and will evaluate and synthesize key takeaways from the responses. It is expected that the City of Mt. Pleasant

would be able to provide contact information for those the City wishes to have interviewed and will support CGR in setting up these interviews.

### **Research Training or Educational Programs Based on Findings**

CGR will use the survey results to determine what training or educational programs might address specific areas of needed improvement. CGR will review relevant literature, as well as look at comparable cities to Mt. Pleasant in Michigan to determine what other municipalities have done to address areas of improvement. As a starting point, we would search recent research publications, media postings, and studies on best workplace climates for government/union employees to see what policies or strategies have been successful implemented. Select virtual interviews could be scheduled to gather information from leadership at these identified organizations.

### **Draft and Finalize Tools and Methodologies for Tracking the Implementation and Impact of Recommendations Over Time**

After completing the survey and summarizing recommendations for improvement, CGR will devise an appropriate implementation and impact tracking plan to assess progress on instituting recommendations and measure their results.

### **Draft, Finalize and Present Key Findings, Trends and Recommendations for Improvement Report**

Based on all the completed work above, CGR will produce a comprehensive final report, including:

- Survey and interview results;
- Key findings, trends and recommendations for improvement;
- Specific types of trainings and educational opportunities that would be beneficial to address areas identified for improvement; and
- Tools or methodologies for tracking the implementation and impact of the recommendations over time.

CGR will provide a draft of this report to Mt. Pleasant for review, comment, and feedback. CGR will respond to all feedback within 2 weeks of receiving it and provide a detailed final report that maintains the confidentiality of respondents for Mt. Pleasant's use. Upon finalization of the report, CGR will conclude with an in-person presentation of the findings to the City Commission.

## **Experience and Qualifications**

CGR has extensive experience conducting employee/workplace climate surveys and organizational needs assessments to aid municipal governments and organizations. We assist with co-creating and improving both the quality of the workplace for staff and the quality of service provision to your community.

In each of these engagements, CGR managed the survey process from inception to completion, including data gathering and analysis, presentation of survey and results, and production of a concise report that demonstrated in-depth key findings and provided actionable recommendations for improvements based on these findings. Additionally, in all of these engagements, CGR maintained the confidentiality of respondents – both as a standard of research, but also in order to ensure respondents were able to comfortably provide open and constructive feedback based on their experiences.

## Documented Experience - Reference Projects

A sample of relevant CGR projects are described in the brief below. Each of these includes the creation of surveys that were tailored to the unique organization/workplace culture so as to produce reports with constructive feedback and actionable recommendations for improvement. For more information on additional projects, we invite you to visit our website at [www.cgr.org](http://www.cgr.org).

### Village of Westfield, NY, Department of Public Works (DPW) Organizational Assessment

The Village of Westfield, NY, hired CGR in 2022 to review its Department of Public Works operations, including compensation and staffing, adequacy of facilities and its fleet, and staff and public satisfaction levels with the service being delivered. CGR interviewed Village and DPW leadership and gathered information on internal departments and operations, including high-level budget overviews for each department. As well, CGR benchmarked staffing, budget and responsibilities against a selection of three comparable peer municipalities. Finally, CGR conducted separate surveys of internal staff and of the external public/customer base, which yielded 380 responses, finding high public satisfaction with the current level of services.

*The survey included 14 items: Clarity of assignments/expectations, department effectiveness, quality of service delivered to public, proper equipment available, staffing adequacy, mix of staff skills, perception of whether work valued by both management and the public, perception of whether staff opinions and input were valued by management municipal leadership, pay and benefit adequacy, department strengths and weaknesses, main challenges.*

In its final report, CGR issued nine recommendations, ranging from the general to the specific, that described ways to improve efficiency, service, operations and budgeting.

For more information view [the project website](#).

### Town of Greece, NY, Fire District Districts Fire/EMS Study and Organizational Assessment

CGR was engaged by the four fire districts that serve the Town of Greece (Barnard, Lake Shore, North Greece and Ridge Road) to evaluate their existing operations and identify room opportunities for improvement including potential consolidation. The project involved extensive interviews, in-depth data analysis and a survey of the existing workforce.

*The survey consisted of 30 items and went out to all volunteer and career members of four different fire departments in the Town of Greece. Examples of what was covered in the survey were: proper equipment available, pay and benefit adequacy, support from leadership, etc.*

CGR identified opportunities to expand and make minor modifications to their operations including adjusting district borders, maintaining volunteer involvement, and group purchasing. There were also three possible scenarios for district mergers – full town merger, a north district and a south district and a career and volunteer district. The fire commissions involved have chosen to retain the status quo as of April 2021.

## **Town of Irondequoit, NY, Fire Districts Study and Organizational Assessment**

CGR was engaged by the five fire districts of the Town of Irondequoit (Laurelton, Point Pleasant, Ridge Culver, Sea Breeze and St. Paul Boulevard) to conduct a comprehensive study to evaluate their operations and identify options for improvement. CGR conducted interviews with an array of members of each department and town and county officials; gathered financial and operational data from a variety of sources; and led a survey of the firefighting workforce, both career and volunteer.

*The survey consisted of 38 items and went out to all volunteer and career members of five (5) different fire departments in the Town of Irondequoit. Examples of what was covered in the survey were: satisfaction with leadership, motivation and commitment to work, workplace conditions, etc.*

All the fire districts face pressures related to declining volunteer activity, increased service demands and the growing costs of providing fire service. These concerns are common across the volunteer and combination fire service in the U.S. CGR detailed the districts' strengths and challenges, and explored and modeled a number of options for improvement, including coordinated purchasing and training across the districts, new initiatives to attract and retain volunteers, and a potential consolidation of two districts, Laurelton and Ridge Culver. The consolidation of the two districts was completed in 2021 to form the Irondequoit Fire District.

## **PathStone Corporation Strategic Plan**



CGR facilitated a strategic planning process for PathStone Corp., a nonprofit community development and human service organization headquartered in Rochester, NY, and serving people across seven states and Puerto Rico. The planning process followed a major leadership transition for the organization and was intended to focus the senior team's activities over a three-year period.

***CGR conducted a survey of PathStone's more than 500 employees and interviewed 16 stakeholders to inform an analysis of PathStone's strengths, weaknesses, opportunities and threats.***

CGR staff then led PathStone's leadership team through a series of facilitated work sessions to craft a written strategic plan. The plan established several measurable, high-level goals on internal communication, assessing programs for mission fit and long-term viability, ensuring workforce excellence, and deepening PathStone's commitment to diversity, equity and inclusion. For each goal, the plan identified specific initiatives, who would be responsible for implementing them, and a target date for completion.

## City of Newton, MA, Needs Assessment

The City of Newton, MA, engaged CGR to conduct a Community Needs Assessment to inform its plans for investing its American Rescue Plan Act (ARPA) allocation.

***Designed to gather feedback from those most impacted by the COVID pandemic, CGR sought input via a multi-lingual survey, targeted focus groups with lower-resourced, traditionally marginalized communities, and meetings with non-profit leaders, elected officials, and direct service City staff. The survey received more than 675 responses.***

CGR found that the pandemic had a disproportionate impact on people of color in Newton, led to substantial challenges with income and managing household expenses, and negatively affected people's mental health and well-being. The report includes findings broken out by participant income, principal language spoken, family status, age, and racial/ethnic categories. The rank order of these needs varied slightly by demographic category but generally the most pressing challenges faced by lower-resourced Newton community members are housing costs and financial hardship/loss of income, followed by child care and health & wellness. CGR recommendations include balancing short-term immediate support to individuals with piloting new programs aimed at long-term stability for households, adapting approaches for specific populations such as immigrants and those who speak English as a second language, and continuing to engage with under-resourced Newton residents.

## Staffing

CGR has assembled a robust and talented staff to meet Mt. Pleasant's needs. Paul Bishop, M.P.A. will serve as the project director and be responsible for the overall project. of contact. Wiley Little will serve as the project manager and will be responsible for leading the key aspects of the engagement. Our team has interdisciplinary expertise regarding survey creation and analysis, data analysis, strategic planning, needs assessments, action plan development and measurement.



**Paul Bishop, M.P.A**  
Principal and Project Director

## Areas of Expertise

- Municipal operations and efficiency
- Shared services and restructuring
- Police, Fire and EMS optimization
- Community engagement
- Identifying and solving problems
- Budgetary and fiscal analysis

## Project Highlights

- Allegany County (NY) EMS Analysis & Strategic Plan
- Avon (CT) Fire Department Strategic Plan
- Operational Assessment of EMS in Cheektowaga
- Consolidation Analysis for City of DuBois & Sandy Township (PA)
- Essex County EMS Strategic Plan (NY)
- Potential Impact of Village of Edgemont (NY)
- Hinesburg (VT) Public Safety Strategic Plan
- The Future of the Fire Service in the Town of Irondequoit (NY)
- Cities of Lewiston and Auburn Consolidation Evaluation (ME)
- Future of Fire and EMS Service in Marbletown (NY)
- Monroe County/ City of Rochester Racial and Structural Equity Commission
- Niagara County (NY) EMS: Options for Future Operations
- Ontario County (NY) Public Safety Plan
- Greater Racine (WI) : Considering Options for the Future
- Raritan (NJ) Fire & Police Operational Assessment
- City of Rochester Architecture & Engineering Department Efficiency (NY)
- Town of Queensbury EMS Analysis & Options (NY)
- Analysis of the 2022 Rockland County (NY) Budget
- Dissolution Impact Analysis for the Village of South Nyack (NY)
- Tompkins County/Ithaca Law Enforcement Evaluation & Criminal Justice Assessment (NY)
- Warren County (NY) Comprehensive Plan for Government Operations
- Options to Improve Fire & EMS Service in Wildwoods (NJ)

## About Paul

Paul Bishop leads the local government practice at CGR. He is a public policy researcher with a passion for addressing public safety issues and improving government operations. He directs projects involving a wide range of issues related to local government operations, public safety services, and community well-being. He approaches each project with the understanding that each client and circumstance is unique.

His experience in government operations spans all aspects of public safety, organizational efficiency, financial analysis and local government reorganization. He brings his experience of system coordination and thorough analysis to each CGR project on which he works. He also brings the perspective of being a supervisor, educator and care provider to each aspect of analysis.

His experience with government management issues is diverse, including evaluating service options, strategic planning and internal efficiencies for municipalities in Connecticut, Maine, Massachusetts, New Jersey, New York, Ohio, Pennsylvania, Vermont, and Wisconsin. He has worked with communities of several hundred to several hundred thousand to help address the diverse array of challenges they face. His engagements consistently result in actionable recommendations that improve client's operations.

Prior to joining CGR in 2012, Mr. Bishop managed EMS education at the Public Safety Training Center at Monroe Community College for 10 years. His work at the Rochester, New York college focused on all aspects of education for EMS including initial certification for emergency medical technicians and paramedics, and leadership. Earlier in his career, he served as paramedic, supervisor and operations manager for an urban EMS organization. He continues to work as a paramedic in his hometown.



## Education

M.P.A., SUNY at Brockport

B.A., Political Science and Organizational Psychology, University of Rochester  
Paramedic, Western New York EMS Training Institute



**Kieran Bezila, Ph.D.**  
Senior Associate

## Areas of Expertise

- Government efficiency
- Workforce development
- Research design
- Data collection
- Survey and focus group work
- Qualitative and quantitative analysis

## Project Highlights

- City of Newton Needs Assessment (MA)
- Chautauqua County Code Enforcement (NY)
- Finger Lakes Clean Energy Workforce Study
- Greater Rochester Chamber of Commerce Regional Talent Study
- Ibero-American Development Corporation (IADC) Healthy Parks Evaluation
- Monroe Community College Federal Title III Grant External Evaluator
- NW Arkansas Municipal Services Assessment
- NYS DWI-DMV Exploratory Study
- Ontario County Weighted Voting 2022 Update (NY)
- ROC2025 Regional Talent Scan
- ROC2025 Remote Worker Study
- Rockland County Budget Review (NY)
- Tioga County Code Enforcement (NY)
- Town of Ontario Collective Bargaining Assessment (NY)
- Town of Queensbury EMS Study (NY)
- Urban League of Rochester Learning Circles Analysis
- Urban League of Rochester-Racial Equity and Justice Initiative Integration

Kieran Bezila is a skilled researcher with experience in both quantitative and qualitative approaches, having taught classes and conducted individual and joint research work at the collegiate level for more than a decade. His research interests include government, politics and the social logic behind everyday decision-making.

At CGR, he has worked in a wide variety of areas, including workforce development, criminal justice, economic assessment, efficiency of local governments and emergency services agencies, public health, and the evaluation of nonprofit organizations and educational programs. His individual projects have examined such diverse topics as the effectiveness of New York State's DWI laws, the coordination of local workforce training programs, code enforcement systems, racial equity considerations around business development and MWBE programs, and charting the evolution of the social determinants of health as a public health concept.

Prior to joining CGR, he was an assistant professor of sociology and a teaching fellow at Beloit College in Wisconsin. Previously, he worked for the Center for Responsive Politics, managing and preparing federal campaign finance data for public view. His National Science Foundation-funded dissertation project enrolled 288 research subjects in a study of the logic underpinning altruistic behaviors such as tipping and gratuities.

Dr. Bezila is proficient in every phase of the research process, from conceptualization and design to data collection, management, and analysis and interpreting results. He has particular skills in research design, questionnaire and survey construction, interview techniques, conducting focus groups and statistical analysis.



## Education

Ph.D. and M.A., Sociology, Northwestern University  
B.A., Sociology, Boston College



**Wiley Little, M.Sc, PE**  
Senior Associate

## Areas of Expertise

- NYS Licensed Professional Engineer (PE) – Environmental
- Urban Design/Place Making
- Municipal operations and efficiency
- Shared services and restructuring
- Qualitative and quantitative analysis
- Stakeholder engagement
- Environmental management

## Project Highlights

- Poultney (VT) Town and Village Merger Impact Study
- Islamic Center of Rochester (NY) Refugee and Migrant Needs Evaluation
- Connected Communities (NY) Data Collection and Measurement Framework Assistance

## About Wiley

Wiley Little, PE, is an urban designer, environmental engineer, and social scientist committed to creating sustainable and thriving communities. With a Master's in City Design and Social Science, he brings a unique perspective to addressing complex urban challenges. Wiley has a proven track record in delivering successful infrastructure projects and has a passion for fostering collaboration between government, businesses, and residents. His expertise in infrastructure development and capital improvement planning and funding, coupled with a deep understanding of social and economic factors, enables him to deliver innovative solutions that improve the quality of life for residents.

Mr. Little volunteers for EcoRestoration Alliance on global nature-based solution projects, and prior to joining CGR, he served as a civil engineer and planning associate for the MRB Group and a Lead Project Engineer for Wright-Pierce.



## Education

M.Sc, City Design & Social Science, London School of Economics  
B.S., Environmental Engineering, University of New Hampshire



**Deon Willis**  
Research Associate

## Areas of Expertise

- Survey and focus group work
- Data collection and analysis
- Qualitative and quantitative analysis
- Database management and design

## Project Highlights

- AmeriCorps Program Evaluation
- Hope585 Community Foster Home Pilot Evaluation
- Trillium Health Needs Assessment
- Rochester Museum and Science Center Strategic Plan
- Climate Solutions Accelerator Indicators
- Chautauqua County Code Enforcement Study

## About Deon

Deon Willis is a researcher and data analyst with a passion for local government, public service, politics and how each shape our world. He has experience in varied methods of research at the collegiate level and professional level. His expertise includes data collection, analysis, visualization, GIS systems, and database design & management.

Prior to joining the CGR team, Mr. Willis served as the administrative program and grants coordinator for the Center for Youth. Mr. Willis is dedicated to increasing equity in the City of Rochester and improving services to youth and families impacted by discrimination and trauma.

Before working at the Center for Youth, Mr. Willis held positions as a career advisor at the University of Rochester's Gwen M. Greene Center and a Congressional intern. He earned a Bachelor of Arts in Political Science with a focus in Public Policy from the University of Rochester. During his undergraduate study, Mr. Willis was selected as a 2020 Public Policy and International Affairs Program Fellow at Carnegie Mellon University in Pittsburgh, PA.



## Education

B.A., Political Science with a focus in Public Policy,  
University of Rochester



**Alina Santiago, M.P.A.**  
Research Associate

## Areas of Expertise

- Survey and focus group work
- Data collection
- Qualitative and quantitative analysis
- Community engagement

## Project Highlights

- Hinesburg VT Public Safety Strategic Plan
- New Rochelle Civilian Review Board
- Raritan Township Police & Fire Assessments (NJ)
- Big Brothers Big Sisters Program Evaluation/Capacity Building
- Ocean County Health Department Assessment (NJ)
- Community Profile Indicators Projects:
  - Mid-Hudson Valley (NY)
  - State of Arkansas - Aspire Arkansas
  - Westchester (NY) - Index Community Profile
  - Worcester (MA) - Worcester County Insights

## About Alina

Alina Santiago joined CGR in 2023 with experience working with non-profits and an interest in furthering social impact and responsibility. She supports projects across CGR's capabilities, utilizing her qualitative and quantitative skills. These include interviewing, running focus groups, data collection, visualization, and geographic information systems (GIS).

In May 2022, Ms. Santiago graduated with her Master of Public Administration from the Brooks School of Public Policy at Cornell University with a concentration in Social Policy. She also earned her B.A. in Government at Cornell University. At the Brooks school, she was the Communications Chair on the executive board of Women in Public Policy and a Teaching Assistant for the Environmental Justice and Policy class at Cornell. Ms. Santiago served as a graduate consultant on projects focused on diversity, equity and inclusion initiatives, non-profits, and affordable housing models.

Before coming to CGR, she served as a Compliance Specialist for Tandym Group. She previously interned for Future Now, SOMOS Mayfair, and Leadership Rochester.



## Education

M.P.A, Brooks School of Public Policy, B.A. in Government  
Cornell University



## Cost Proposal

CGR proposes to complete the tasks identified in this proposal for an all-inclusive fixed fee of \$31,000.

CGR has budgeted for four (4) virtual meetings with Mt. Pleasant:

- Project initiation/kick-off
- Draft survey feedback meeting
- Draft data and measurement management plan meeting
- Draft report feedback meeting

CGR has budgeted for one (1) in-person trip and meeting with Mt. Pleasant:

- Final presentation of report to City Commission

This fee covers all miscellaneous expenses (hosting/administering the digital survey, material production, project management, travel, etc.).

## Timeline

CGR proposes to complete this engagement in **4 months** from contract signing. See our proposed timeline broken down by task. This presumes Mt. Pleasant's availability to move tasks forward in a timely fashion.

Task	Month 1	Month 2	Month 3	Month 4
Project Initiation				
Baseline Review				
Draft and Finalize Online Survey				
Administer Survey and Evaluate/Synthesize Data				
Research Training and Educational Programs Based on Findings				
Draft and Finalize Tools and Methodologies for Tracking Recommendations Over Time				
Draft Report Delivered				
Final Report Delivered and Final Presentation				

## Tailored to Your Needs



CGR has developed the proposed scope, budget, and project timeline based on our understanding of Mt. Pleasant's needs and expectations for this project. In the event our budget or scope is inconsistent with Mt. Pleasant's expectations, we would welcome the opportunity to discuss how they might be adjusted.

**ACORD**<sup>TM</sup>**CERTIFICATE OF LIABILITY INSURANCE**

DATE (MM/DD/YYYY)

2/14/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must have **ADDITIONAL INSURED** provisions or be endorsed. If **SUBROGATION IS WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer any rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> <b>USI Insurance Services LLC</b> <b>726 Exchange Street</b> <b>Buffalo, NY 14210</b> <b>855 874-0123</b>		<b>CONTACT NAME:</b> <b>Melanie K Martin</b> <b>PHONE (A/C, No, Ext):</b> <b>877 396-3800</b> <b>FAX (A/C, No):</b> <b>877-775-0110</b> <b>E-MAIL ADDRESS:</b> <b>Melanie.Martin@usi.com</b>															
<b>INSURED</b> <b>Center for Governmental Research, Inc.</b> <b>1 South Washington Street</b> <b>Suite 400</b> <b>Rochester, NY 14614</b>		<table border="1"> <thead> <tr> <th>INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A : Arch Insurance Company</td> <td>11150</td> </tr> <tr> <td>INSURER B : Hartford - WC Multiple Issuing Cos</td> <td>00914</td> </tr> <tr> <td>INSURER C : Beazley Insurance Company, Inc.</td> <td>37540</td> </tr> <tr> <td>INSURER D : Richmond National Insurance Company</td> <td>17103</td> </tr> <tr> <td>INSURER E :</td> <td></td> </tr> <tr> <td>INSURER F :</td> <td></td> </tr> </tbody> </table>		INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A : Arch Insurance Company	11150	INSURER B : Hartford - WC Multiple Issuing Cos	00914	INSURER C : Beazley Insurance Company, Inc.	37540	INSURER D : Richmond National Insurance Company	17103	INSURER E :		INSURER F :	
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**COVERAGES****CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
<b>A</b>	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC OTHER:			<b>ANPKG1142600</b>	<b>10/01/2024</b>	<b>10/01/2025</b>	EACH OCCURRENCE <b>\$1,000,000</b> DAMAGE TO RENTED PREMISES (Ea occurrence) <b>\$1,000,000</b> MED EXP (Any one person) <b>\$25,000</b> PERSONAL & ADV INJURY <b>\$1,000,000</b> GENERAL AGGREGATE <b>\$3,000,000</b> PRODUCTS - COMP/OP AGG <b>\$3,000,000</b> \$
<b>A</b>	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS ONLY			<b>ANPKG1142600</b>	<b>10/01/2024</b>	<b>10/01/2025</b>	COMBINED SINGLE LIMIT (Ea accident) <b>\$1,000,000</b> BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
<b>A</b>	<b>UMBRELLA LIAB</b> <input checked="" type="checkbox"/> <b>EXCESS LIAB</b> <input type="checkbox"/> OCCUR <input checked="" type="checkbox"/> CLAIMS-MADE DED RETENTION \$			<b>ANFXS3045600</b>	<b>10/01/2024</b>	<b>10/01/2025</b>	EACH OCCURRENCE <b>\$3,000,000</b> AGGREGATE <b>\$3,000,000</b> \$
<b>B</b>	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE/OFFICER/MEMBER EXCLUDED? <input checked="" type="checkbox"/> Y <input checked="" type="checkbox"/> N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		<b>N/A</b>	<b>01WECGC1631</b>	<b>12/31/2024</b>	<b>12/31/2025</b>	PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT <b>\$1,000,000</b> E.L. DISEASE - EA EMPLOYEE <b>\$1,000,000</b> E.L. DISEASE - POLICY LIMIT <b>\$1,000,000</b>
<b>C</b>	<b>Cyber Liabil</b>			<b>V2048C2408</b>	<b>10/01/2024</b>	<b>10/01/2025</b>	<b>\$1M/Retention-\$5,000</b>
<b>D</b>	<b>Professional</b>			<b>RN70328397</b>	<b>10/01/2024</b>	<b>10/01/2025</b>	<b>\$1M/\$3M - \$2500 ded</b>

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Those usual to the insureds operations.

The General Liability policy includes an automatic Additional Insured endorsement that provides Additional Insured status to City of Mt. Pleasant, only when there is a written contract that requires such status, and only with regard to work performed by or on behalf of the named insured.

**CERTIFICATE HOLDER****CANCELLATION**

**City of Mt. Pleasant**  
**320 West Broadway**  
**Mount Pleasant, MI 48858**

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE



# Workplace Climate Survey

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Submitted to

**City of Mt. Pleasant**  
Consultant Services for  
Workplace Climate  
Survey

Prepared by

**Jennifer Miller**  
Millan Chicago  
Managing Partner

Nashville | Chicago | Greenville

# Greetings, City of Mt. Pleasant

On behalf of Millan Chicago, LLC (Millan), I am pleased to submit this proposal to the City of Mt. Pleasant (City) in response to the Request for Proposals: Consultant Services for Workplace Climate Survey. We understand the objective of this project is to conduct a workplace climate survey to collect information from all full-time and part-time union and management employees. The scope of work includes but is not limited to the following (1) deploy, manage, and administer a comprehensive project plan that covers all tasks, deadlines, and responsibilities of key stakeholders, (2) design and deploy a workplace climate survey to provide accurate and robust information in relation to identified project goals, (3) conduct all relevant analyses, (4) conduct interviews and/or focus groups to gain in-depth information and (5) present and provide a detailed report to the City Commission.

Millan is a management consulting firm that works with organizations to use data effectively and efficiently to drive people-focused decisions. Our firm is dedicated to serving state and local government agencies, and not-for-profit and private organizations. The following points highlight the strengths Millan's team brings to the City of Bend.

- **Experience in providing employee surveys for municipalities and organizations across the county.** Using our previous experience coordinating successful surveys, we will ensure a high level of service for your Organization Climate Survey. Because our firm works with numerous organizations, institutions, and municipalities, we have significant experience with a wide range of stakeholders including residents, public officials and staff, employees, leaders, and many other interested parties. We pride ourselves on grounding our surveys in the very best scientific foundations and tailoring the experience to those who are being asked to share their views and to those who want to use the collected data to drive the best decisions.
- **Our team is made of highly qualified and experienced consultants and subject matter experts.** We believe that our training and expertise in survey methodology and management sciences combined with our 45+ years of combined experience delivering projects on time and within budget make us a clear choice to provide your survey needs for this project. For all survey projects our company has conducted since our founding in 2018, we have an unblemished record of producing high quality results (i.e., at least 95% confidence levels with no greater than a 5% margin of error) with 100% on-time delivery and within budget.
- **We are committed to delivering high quality service.** As an independent consulting firm located just south of Nashville, we are committed to collaborating with the City to deploy a community survey reflective of the community that lives in City of Bend.

Our approach (described in more detail in the following pages) ensures that your survey will best capture the perceptions and attitudes that are critical for the City in the most efficient and user friendly manner. Our methodology is based on fundamental measurement design which our managing partners not only have experience putting into practice, but also have more than 30 years of experience teaching and making contributions to the scientific and practice literature. That is, we not only know the best methods for collecting data, we contribute to creating those methods for others to use. We will also prepare full, written reports and oral presentations of the results to the stakeholder groups that you see as essential. In short, the entire survey design, development, deployment, analysis, and interpretation process will be transparently shared with you in a collaborative approach that maximizes your experience.

As a managing partner of Millan, I am authorized to commit Millan to the services proposed herein. Should you have any questions, you may contact me directly at 615-587-3127 or [jennifer@millanchicago.com](mailto:jennifer@millanchicago.com). We appreciate the opportunity to submit this proposal and look forward to working with the City of Mt. Pleasant.

We have commercial general liability, umbrella liability, automobile liability, and professional liability. We are committed to ensuring that we have what is necessary for the City to conduct this project.

Sincerely,



Jennifer Miller  
Millan Chicago, Managing Partner  
[jennifer@millanchicago.com](mailto:jennifer@millanchicago.com)

Millan Chicago  
725 Cool Springs Blvd.  
Suite 600  
Franklin, TN 37067

# Statement of Understanding

## Objective

Conduct a workplace climate survey of all full-time and part-time union and management employees. Interviews and/or focus groups will be utilized to further understand the survey results.

## Services Provided

In collaboration with the City of Mt. Pleasant, a workplace climate survey will be developed to assess perceptions and attitudes of City employees. Millan will design survey, collect data, and provide an in-depth analysis of the data. Based on survey results, interviews/focus groups will be utilized to further explore the results. Millan will provide recommendations based on results, develop reports, and present to key stakeholders.

## Challenges

As part of the process, we try to anticipate and mitigate all challenges. During survey development, we are most concerned with ensuring that items are well written, clear, and concise. We also want to make sure if there are any job characteristic items (i.e., questions that ask about role) that respondents see themselves in the response choices and don't feel left out. We also work with our clients to understand the languages (if any) the survey should be translated to beyond English. During data collection, we want to collect information from as many employees as possible to achieve a high participation rate.

## Additional Services

One aspect that adds to the process is to allow for time to work with leaders in how to use the data effectively in action planning and/or strategic planning and tools to track progress.

# Study Methodology

At Millan, we adhere to rigorous methodological standards by utilizing an evidence based approach along with industry best practices. Our focus is on using appropriate methodologies that are grounded in science and best practices to ensure that the information collected and analyzed is representative of the organization and conducted to a high level of performance. We value transparency, collaboration, and communication. Below is a high level overview of our methodology for surveys and focus groups. In the following pages, we describe this methodology in greater detail.



# Survey Development

*Design survey to collect information on how City of Mt. Pleasant employees perceive of key domains including but not limited to policies, practices, and procedures.*

## Activities

- Work with the Project Manager to ensure that Millan has access to all relevant documents and background information.
- Work with key stakeholders to discuss the domains of organizational climate that the City would like to measure. We have a database of items that are related to several areas including questions about workplace, supervision, hiring, promotion, employee growth and development, work engagement, job satisfaction, compensation and benefits, leadership, relationship with immediate supervisor, alignment with mission/goals, general culture and communication, and diversity, equity, and inclusion.
- Work collaboratively with the Project Manager to send drafts and get feedback about the items. We view the survey development process as iterative and want to ensure that everyone feels comfortable with the survey. Ultimately, we need approval of the final survey before moving forward.
- Determine if survey should be translated into another language (i.e., Spanish).

## Work Products

- **City of Mt. Pleasant 2025 Employee Climate Survey** that takes approximately 10-15 minutes to complete (to allow for a high level of participation). The survey will follow best practices and evidence-based practices of survey methodology.

# Implementation

*Develop implementation plan to ensure a high percentage of employees participate in the data collection. This phases focuses on data collection techniques and communication plan.*

## Activities

- Develop plan for online and paper (if needed) survey data collection.
  - Our online survey platform is GDPR compliant, certified to ISO 27001, and has a certification of HIPPA compliance.
  - Only hosting providers who are certified to ISO 27001 and with providers having Tier IV facilities, SSAE-16 and ISAE 3402 compliance, SOC II reports or PCI DSS compliance. These systems include ANS Group, Rackspace Global, and Microsoft Azure.
  - Applications are protected by firewalls and router technology, secure HTTPS and TLS transport over public networks, development practices and secure coding methodologies that align with OWASP, permanent malware scanning, vulnerability scanning, backups on a daily basis, and third party penetration tests carried out annually.
- Develop communication plan and provide information for City to send out to employees.

**95**

For data collection, we want to ensure that as many employees participate as possible. We use industry standards with a 95% confidence interval and 5% margin of error to calculate that a total of 95 employees is required to participate.

## Work Products

- **City of Mt. Pleasant 2025 Workplace Climate Survey** optimized for online and paper (if needed).
- **Communication plan and materials** for internal promotion.



# Data Collection

*Deploy methodologies and monitor respondent participation.*

## Activities

- Collect a representative sample of respondents.
  - For a 95% confidence interval and 5% margin of error, approximately 95 respondents are needed for the survey.
- Monitor responses and mitigate any issues related to participation. We also want to be sensitive to other factors that might negatively impact data collection. These include non-response due to respondent factors, non-response due to logistic factors, inefficiencies in data management and curation, lack of 'buy-in' at the organizational level, and failure to budget appropriate time for data collection.
- Provide timely and responsive customer service to troubleshoot any problems. Employees will have access to a dedicated project manager by phone and email to ensure they have the support needed to participate in the survey.

## Work Products

- **City of Mt. Pleasant 2025 Workplace Climate Survey** data collection completed with the goal to achieve a 95% confidence interval and 5% margin of error.

# Data Analysis

*Conduct quantitative and qualitative data analyses and ensure rigorous statistical techniques are deployed.*

## Activities

- Deploy data analytic framework. Prior to the analysis, progress through **data management** and **data cleaning** stages.
- Conduct **descriptive statistics** for each question, cross-tabs with respondent characteristics of interest, and any additional criteria decided upon during survey design phase.
- Conduct **inferential statistics** (if applicable) to understand how factors relate to overall perceptions of health.
- Conduct **thematic analyses** to determine key themes, examples of themes from quotes, and overall trends from the survey.

## Work Products

- In-depth quantitative and qualitative analysis will be provided in the final deliverables.

# Interviews/Focus Groups

*Depending on survey results, conduct interviews and/or focus groups to further explore the results and provide actionable insights for the City to consider to improve workplace culture.*

## Activities

- We will work with the City to identify the individuals that should be invited to participate. Our assumption is that, if conducted in-person, that space utilized by the City can be used in this effort.
- At the beginning of the focus group, all participants are given an informational sheet about the guidelines and practices that we follow for a focus group.
  - One facilitator will lead the group asking questions from the approved list that was developed in consultation with the City. Additional follow-up questions may be asked for additional information and/or clarification.
  - A second person accompanies the facilitator to allow for note taking and also to ensure that all voices are heard and everyone has a chance to participate.
- Our goal here is to get a diverse set of perspective, opinions, and attitudes as possible. This methodology can be slightly altered depending on the context but generally formats well for focus groups, interviews, town halls, and listening sessions.

## Work Products

- In-depth qualitative analysis will be provided in the final deliverables.

# Deliverables

*Integrate data collection, analyses, interpretation, and additional work into a final report.*

## Tasks

- Design and develop report that includes executive summary, objectives, methodology, analysis (including cross-tabulations, visualizations of results), interpretation, and recommendations based on survey and interview/focus group results.
- Report will outline the methodology used and detail software utilized for analysis. Any code written for this project will be given to the City.
- Design and develop PowerPoint presentation that contains the same information as the report.
- Present analysis and interpretation of methodologies to Project Team and City.

## Additional Services

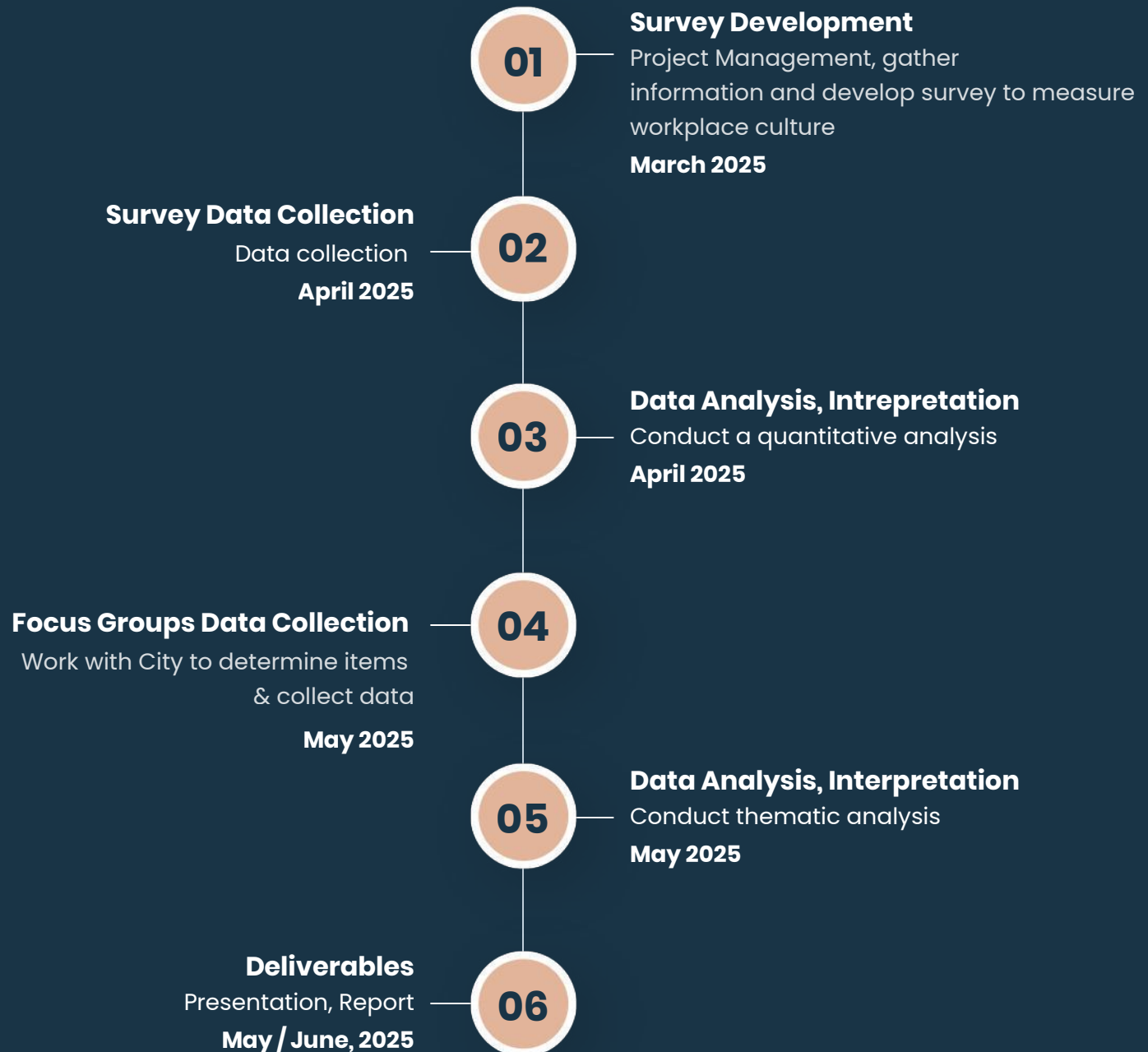
We can also assist with using the information collected in strategic planning sessions. Millan offers strategic planning services and in fact, one of our team members (George) has extensive experience in coaching leaders on how to use this information. We can provide coaching sessions and/or facilitate workshops, if desired. We can also develop tools to help track progress over time.

## Work Products

- **Final report** to City of Bend two weeks after data collection is completed that includes all quantitative analyses performed, results of the community survey, comprehensive description of themes from open-ended questions, and analysis of respondent characteristics.
- **Presentation** to key stakeholders.

# Project Timeline

Please note this is just an anticipated timeline. We have the capacity to complete the timeline quicker but we have found that it takes time for the organization to review deliverables.



# Millan Chicago

Millan Chicago was founded in 2018 to provide consulting services that focus on helping organizations and municipalities use data more effectively to understand key stakeholder perceptions and attitudes and to ultimately drive key decisions. Our backgrounds in psychological science and data science enable us to deliver high quality consulting.

Millan Chicago's primary office is south of Nashville, Tennessee. We also have personnel located in Chicago, Illinois, and Greenville, South Carolina. The following pages contain the key personnel for this project. Additional personnel will be utilized if phone calls and/or outreach for survey deployment is need.

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## Recent Clients



# Selected Experience

Millan has conducted numerous surveys for organizations to collect information around key aspects of people's experiences. Below are selected survey experiences to showcase Millan's experience and expertise. Jennifer and Ron were the primary personnel on all the projects. All of the completed projects received final reports, presentation slides (if applicable), and the raw data.

Client Name	Methodology	Brief Description
Metropolitan Water District of Greater Chicago  Karen Brown (brownk@mwrld.org)	Survey, Focus Groups	Developed employee engagement survey with customized domains that relate to employee engagement. Survey deployed via paper and online methodologies. Analyses conducted included quantitative and qualitative. Focus groups conducted after survey. (Project Dates: October 2022 - July 2023)
Digital Ubiquity Capital (City of Centennial, West Hollywood, and Elk Grove) John Zannos (jzannos@digitalubiquity.capital)	Survey	Developed community surveys to understand perceptions and attitudes around current and future broadband usage. Survey deployed online to residents and business owners. Analyses included quantitative, predictive modeling, and qualitative analyses. (June 2023 - current)
National Communication Association  Shari Miles-Cohen (shari@leadingacrossdiffrenecs.com)	Multiple member and convention surveys	Developed multiple surveys to understand experience as a member and during the annual convention. Survey deployed online. Analyses included quantitative and qualitative analyses along with workshops for leadership on how to use results. (August 2022 - January 2024)
Knox County Board of Education  Terri Coatney (terri.coatney@knoxschools.org)	Survey, Focus Groups	Working in collaboration with Knox County Schools, Millan developed three surveys for key stakeholders (families/caregivers, community, and employees). After an analysis of the survey, focus groups were conducted with each stakeholder group to further understand the context of the results (July 2024 - December 2024)
South Carolina Department of Employment and Workforce  Erica VonNessen (ervonnessen@dew.sc.gov)	Survey	Developed survey to understand the factors that have led to a low workforce participation rate in the state of South Carolina. We developed the survey in collaboration with personnel and deployed to over 150,000 individuals. Several analyses were conducted and recommendations provided. Millan presented for SC at a workforce development conference. (2022)
South Carolina Department of Public Health  Karla Buru (karla.buru@dph.sc.gov)	Survey	Developed multiple surveys to understand employee experience in the Department of Health across South Carolina. For all the surveys, the client received various reports that were shared with the entire workforce and leadership. Workshops were also given to summarize results and give context related to the research related to employee experience (2022-current). We have provided critical survey services during a period of reorganization and transition and have provided accompanying support to interpret results and implement appropriate change strategies.

# Ron Landis PhD, MS

## Methodologist



**Ron brings over 30 years of experience in the area of quantitative methodologies and industrial-organization psychology. Ron's role on the project is to bring his significant experience and expertise to design and implement the survey and focus groups.**

### About Ron

Ron is the co-founder and managing partner of Millan. He has a PhD in industrial organizational psychology. He has over 30 years of experience in management consulting with an emphasis in quantitative methodology and measurement development. He has published more than 70 journal articles, book chapters, and works in edited volumes. He is also a faculty member at Clemson University in the College of Business. Ron is a fellow of the American Psychological Association, American Psychological Society, and Society for Industrial Organizational Psychologists.

Specialities include:

- Measurement Development
- Quantitative Methodology
- Expert Witness

### Selected Experience

#### **South Carolina Department of Employment and Workforce**

- Worked with Director of Labor Market Information and Research Economist to develop survey to collect information about the low rate of workforce participation in South Carolina.
- Presented findings at the National Association of State Workforce Agencies for South Carolina.

#### **Metropolitan Water Reclamation District of Greater Chicago**

- Developed employee engagement survey to collect information around key areas of the employee experience.
- Deployed agency-wide surveys online and via paper to employees at MWRD.
- Conducted focus groups after survey to further understand survey results.
- Presented results to leadership team and to entire organization.

#### **Digital Ubiquity Capital**

- Developed community surveys for West Hollywood, Elk Grove, and Centennial to understand current and future broadband needs.
- Identified opportunities for future fiber networks.

Current Project Responsibilities - Focus on development of appropriate and rigorous methodologies including development of survey and provide assistance with data analysis and interpretation.



# Jennifer Miller PhD, MS

## Project Manager/Data Scientist



**Jennifer brings over 20 years of experience and expertise in various research methodologies to help communities and organizations with data-driven decisions. Her role is to oversee and execute project activities.**

### About Jennifer

Jennifer is the co-founder and managing partner of Millan. She has a PhD in psychological science and a MS in applied statistics. She has nearly 20 years of experience in conducting quantitative and qualitative research and analytics. Her work has produced over 20 peer-reviewed publications in various areas including community health (her community health publication has over 130 citations!). She has delivered several conference presentations and Her goal is to collaborate with clients to determine solutions that will move their organization and community forward. She recently won the Indiana University Alumni Award for the Department of Psychological and Brain Sciences.

Specialities include:

- Data-driven strategic planning
- Qualitative Analytics
- Quantitative Analytics
- Social Network Analysis
- Project Management

### Selected Experience

#### South Carolina Department of Employment and Workforce

- Worked with Director of Labor Market Information and Research Economist to understand the low rate of workforce participation in South Carolina.
- Oversaw survey deployment of community survey to over 150,000 individuals.
- Identified key areas of opportunity for South Carolina to invest resources to increase workforce participation.

#### South Carolina Department of Public Health

- Worked with Executive Leadership Team including Deputy Director of Health Strategy and External Affairs to develop several surveys related to employee experience.
- Deployed agency-wide surveys to employees across the state of South Carolina.
- Developed deliverables including reports, communication briefs and workshops.

#### Digital Ubiquity Capital

- Developed community surveys for West Hollywood, Elk Grove, and Centennial to understand current and future broadband needs.
- Identified opportunities for future fiber networks.

**Current Project Responsibilities - Dedicated project manager that will collaborate the City to ensure project is on task and on time. Provide quantitative and qualitative data analysis and report design/writing.**

# George Langlois PhD, MS

## Subject Matter Expert



**George's role on the project is to bring his significant experience and expertise to assist leaders in utilizing data-driven information.**

### About George

George is a seasoned professional with over 30 years of experience in successfully assisting organizations identify, develop, and deploy highly performing mid and senior level teams. He has demonstrated skills in management consulting including leadership development and strategic planning. Has successfully coached C-suite executives in utilities, high tech, healthcare, finance, and higher education.

Specialities include:

- Strategic Planning
- Survey Development
- Team Formation
- Leadership Development

### Illinois Institute of Technology

Executive Director of Center for Research and Service

- Provided direction and oversight for a center designed to generate student funding and professional training.
- Significantly increased the number and variety of consulting engagements that resulted in more students receiving training and funding. He successfully expanded service offerings to clients and emphasized a more data-oriented approach to clients.

### Organizational Strategies, Inc. (OSI)

Founder

- Founded OSI to provide executive level consultation in the areas of strategic planning, executive coaching and development, executive assessment and selection, change management, organizational assessment, and talent management.
- Organization quickly grew into a nationwide firm with clients from Virginia to Colorado. OSI's clients included both Fortune 500 firms and medium to large non-profit organizations.

### Organizational Effectiveness Consultants (OEC)

Founder

- Founded OEC to help organizations achieve better bottom-lined results through better management of their human resources.
- OEC became a nationally recognized firm in the area of employee surveys, change management, and personnel selection programs.

Current Project - Will work on survey related tasks and assist in helping leaders use the information in the strategic planning phase.

# Detailed Cost Breakdown

Survey		
Phase	Activity	Cost
Survey Development	Survey design following industry standards and best practices from scientific literature ensuring high validity and reliability for community surveys.	\$3,000
Implementation	Program community surveys on data collection program. Design communication plan associated with invitation to participate in data collection.	\$1,000
Data Collection	Project management of data collection to ensure robust sample and send up follow-up communications. Platform for data collection.	\$2,000
Data Analysis	Quantitative and qualitative data analysis.	\$3,000
Interviews and/or Focus Groups	Conduct appropriate methodology to develop, conduct, analyze, and interpret interviews and focus groups.	\$5,000
Travel (OPTIONAL)	Travel for focus groups (assuming 3-4 days).	At cost for hotel & transportation
Deliverable	Design deliverables including report, presentation, and additional items.	\$6,000
Presentation	Present results to key stakeholders (can be done either remotely or in person).	\$2,000
Action Planning Services (OPTIONAL)	Coaching and/or workshops to facilitate the use of data for action planning purposes.	\$4,000
Survey and Interview/Focus Group Total	(without the action planning services)	\$22,000



# Consultant Services for Workplace Climate Survey

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**ZILO**  
INTERNATIONAL GROUP

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STRATEGIC CONSULTING

**Submitted By:**

Zilo International Group LLC  
3939 East Arapahoe Road, Suite 210  
Centennial, CO 80122  
[www.zilointernational.com](http://www.zilointernational.com)

**Milena Zilo**

Founder and Chief Executive Officer  
[milena@zilointernational.com](mailto:milena@zilointernational.com)  
(917) 225-1851

# Cover Letter

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Dear Selection Committee,

I am writing to express Zilo International Group LLC's sincere interest in partnering with the City of Mt. Pleasant to design and implement a workplace climate survey. With extensive experience conducting organizational climate assessments for public sector entities, we understand the importance of fostering transparency, strengthening workplace culture, and ensuring employees feel heard and valued.

At Zilo International Group, we specialize in conducting comprehensive climate and cultural assessments that provide leadership with actionable insights. Our methodology prioritizes engagement, confidentiality, and inclusivity, ensuring that all full-time and part-time union and management employees have a voice in the process. We have successfully conducted similar workplace climate surveys for organizations, providing critical data to inform leadership decisions and drive meaningful organizational improvements.

Our team is prepared to manage all aspects of this project—from survey design and data collection to analysis and presentation of findings. We will provide the City Commission with a detailed report that highlights key themes while ensuring respondent confidentiality. Additionally, we can facilitate follow-up discussions to further explore the survey results and support ongoing initiatives aimed at strengthening workplace culture.

As the founder and CEO of Zilo International Group, I will personally oversee this project and serve as your primary point of contact. Please do not hesitate to reach out with any questions. Thank you for considering Zilo International Group for this important initiative. We look forward to the opportunity to support the City of Mt. Pleasant in fostering a positive and inclusive work environment.

Sincerely,  
Milena Zilo



Founder and Chief Executive Officer  
Zilo International Group, LLC  
3939 East Arapahoe Road, Suite 210 | Centennial, CO 80122  
Mobile: 917-225-1851 | Office: 720-295-0054  
[milena@zilointernational.com](mailto:milena@zilointernational.com) | <http://www.zilointernational.com>



# Executive Summary

Zilo International Group, LLC is a 100% privately held, woman-owned and operated management consulting firm. It was founded in Colorado in 2014 by CEO Milena Zilo following nearly a decade of financial experience in Wall Street. We are an experienced employee-engagement and government contractor and offer a variety of services to organizations of all sizes in the public, private, and nonprofit sectors. In the past few years, we have won projects in California, Colorado, District of Columbia, Hawaii, Indiana, Michigan, New Mexico, Oregon, Utah, Washington, and Wyoming.

Our objective is *Positioning You for Success* through a tailored approach to consulting. With each engagement, we aim to implement custom-built solutions to meet your specific needs.

Our team for this project is composed of individuals who have strong backgrounds conducting surveys, executive coaching, diversity, equity, and inclusion training, and strategic implementation. Working with both the private and public sector, we understand emerging trends and are able to develop strategic solutions that best match your objectives and values. We are invested in our clients' success and work diligently with a focus on achieving measurable results and building for the future. We employ the following key elements



#### ***Innovation and Execution:***

We support our clients in executing competitive and results-driven solutions.



#### ***Small Expert Teams:***

We specifically match each client with a team of our dedicated consultants.



#### ***Client Ownership Culture:***

We are committed to the long-term success of our clients through strategies reinforced by mission, vision, and values.

## 1

### **EXPERIENCE**

Our consultants have worked in multiple industries, accumulating vast experiences across different business units, reducing operating costs and delivering growth. We develop tailored solutions for our clients' specific needs and goals.

## 2

### **PEOPLE**

We integrate into the teams we work with from the start to the end of the project. The collaboration and culture of our team is what ensures success. You'll find our process to be highly adaptable, iterative, and collaborative.

## 3

### **VALUES**

Our core values align with our actions and are the driving factors behind everything we do. Our core values are: Loyalty, Respect, Integrity, Accountability, Entrepreneurship, and Excellence.

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**We are committed to  
the long-term success  
of our clients through  
strategies reinforced by  
Mission, Vision, and  
Values.**

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We integrate into the teams we work with from the start to the end of the project. You'll find our process to be highly adaptable, interactive, and collaborative.

**ZILO**  
INTERNATIONAL GROUP

# Communication and Customer Services

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As a boutique management consulting firm, Zilo International Group is dedicated to ensuring the success of the City of Mt. Pleasant's Workplace Climate Survey. Our founder and CEO, Milena Zilo, will personally oversee all aspects of this engagement, ensuring the highest level of attention and expertise. We view every project as a partnership and will collaborate closely with City leadership to establish clear, effective communication channels that serve all stakeholders. This includes regular check-ins, open lines of communication, and a collaborative approach to addressing any challenges that arise. We prioritize responsiveness, promptly addressing all inquiries and keeping City officials fully informed of the project's progress.

Client satisfaction is central to our approach, and we work closely with our clients throughout the project lifecycle. From the outset, we will work with the City to set clear expectations and develop a comprehensive project timeline. As we gather and analyze employee feedback, we will communicate any updates that could impact the project's scope in a timely manner, maintaining transparency and trust. Our proactive communication strategy includes regular meetings, progress reports, and ad-hoc updates as needed, ensuring City leadership is always informed of the project's status and any necessary adjustments.

Recognizing the unique needs of the City of Mt. Pleasant, we tailor our approach to align with specific objectives, ensuring that the workplace climate survey captures the most relevant and valuable insights for leadership. We implement rigorous quality control processes at every stage, supported by a dedicated quality assurance team to ensure that all deliverables meet the highest standards. Continuous feedback from City officials throughout the project lifecycle allows for ongoing refinement and ensures that any concerns are promptly addressed.

To manage any issues effectively, we have a robust escalation process in place. Any concerns will be acknowledged within 24 hours, with immediate action taken by our project manager or designated point of contact to resolve them efficiently.

Our client-centric approach is built on collaboration, trust, and long-term partnership. We strive to integrate seamlessly with the City's team, working together from project initiation to completion. Our focus on adaptability ensures we meet evolving needs, while our commitment to delivering meaningful, actionable insights reinforces our dedication to the City's success. We are committed to providing strategies that align with the City's goals, ensuring the insights we deliver have a lasting, positive impact on the workplace culture and operational effectiveness of the City of Mt. Pleasant.



# Project Approach

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Zilo International Group LLC is dedicated to delivering a customized approach that yields actionable insights and reliable data specifically tailored for the City of Mt. Pleasant's workplace climate survey. Our methodology emphasizes expert guidance throughout the entire process, fostering a collaborative environment that enhances the overall effectiveness of the assessment.

Our focus will encompass key dimensions of the employee experience, including workplace morale, leadership support, organizational effectiveness, and team dynamics. We will design a comprehensive and confidential survey that reflects the unique needs and workforce structure of the City, ensuring that both union and management employees have an opportunity to share their perspectives. By identifying the factors that drive employee engagement, job satisfaction, and organizational cohesion, we aim to provide leadership with clear, data-driven recommendations that support a productive and inclusive workplace.

Culture plays a vital role in shaping a positive and high-performing municipal work environment. It influences how departments operate, collaborate, and engage with the community. Our assessment will evaluate the current workplace climate within the City of Mt. Pleasant, providing insights into how existing practices impact employee morale, communication, and overall effectiveness. Recognizing the relationship between organizational structure and culture, we will identify opportunities for growth and improvement to help leadership foster a stronger, more engaged workforce.

We aspire to equip the City of Mt. Pleasant with the tools and insights necessary to enhance workplace culture, improve employee relations, and strengthen leadership effectiveness. By leveraging the findings from our climate assessment, we will empower the City to make informed decisions that support a thriving, inclusive, and resilient workforce aligned with its long-term strategic goals.

## Phase 1: Kick-off Call / Project Support

The kick-off meeting will serve as the foundational step for the City of Mt. Pleasant's workplace climate survey project. This critical meeting will involve key stakeholders, including City leadership, department heads, Human Resources representatives, union and management representatives, and other relevant personnel. The primary objective is to align all participants on the project goals, clarify expectations, and establish effective communication protocols to ensure a smooth and collaborative process.

During the meeting, we will begin with introductions, followed by an overview of Zilo International Group and our approach to conducting workplace climate assessments. We will then discuss the objectives of the survey, outlining the project scope, expected

outcomes, and how the results will be used to support workplace improvements. A proposed timeline will be presented, highlighting key milestones and deliverables to ensure transparency in the project's progress.

To facilitate effective collaboration, we will establish regular communication schedules and designate primary points of contact. This will create a clear reporting structure to keep all stakeholders informed and engaged throughout the project. We will encourage open dialogue, allowing stakeholders to share insights and feedback to help refine the survey approach and ensure alignment with the City's workforce priorities.

Finally, we will summarize action items and responsibilities, ensuring that all participants understand their roles and next steps. Following the meeting, Zilo International Group will provide comprehensive minutes summarizing discussions and confirming the project timeline. Regular check-ins will be scheduled to maintain ongoing communication and adaptability throughout the assessment process, laying the groundwork for a successful initiative that supports a positive, inclusive, and effective workplace culture within the City of Mt. Pleasant.

## **Phase 2: Customized Survey Design and Development**

In Phase 2, we will focus on the design and administration of a comprehensive workplace climate survey tailored specifically for the City of Mt. Pleasant. This survey will be distributed to all 125 employees, including full-time and part-time union and management staff, ensuring a thorough assessment of workplace experiences, perceptions, and overall organizational climate.

To initiate this phase, we will conduct a comprehensive needs assessment by engaging with key stakeholders, including City leadership, Human Resources representatives, department heads, and union representatives. This collaborative effort will help identify specific areas of focus, workplace challenges, and any gaps in understanding the employee experience. Additionally, we will review best practices in workplace climate assessments, incorporating proven methodologies and industry-standard metrics that are most relevant to municipal work environments.

Next, we will develop a customized survey instrument designed to capture key workplace dimensions. The survey will include:

- Demographic questions to segment responses by relevant categories such as department, role, and tenure.
- Questions addressing employee engagement, morale, leadership support, workplace relationships, communication, and organizational effectiveness.
- Validated scales where appropriate to ensure consistency in measuring employee sentiment.

- Open-ended questions that allow employees to provide qualitative feedback, offering deeper insights into their experiences and perspectives.

Once the survey is finalized, we will present the instrument to City leadership and key stakeholders for approval. During this presentation, we will provide an overview of the survey structure, explain the rationale behind our question selections, and outline the expected outcomes of the data collected.

Additionally, we will develop a detailed administration plan that outlines the timeline for survey launch and includes pre-launch engagement activities to generate awareness and encourage participation. A communication strategy will be implemented to introduce the survey to employees, emphasizing confidentiality, anonymity, and the importance of participation. We will also explore potential incentives or engagement strategies to promote higher response rates.

Finally, our team will ensure that the survey is set up on a secure, user-friendly digital platform, configured to support data privacy and confidentiality while allowing employees to provide candid feedback.

By the conclusion of Phase 2, we will deliver a validated, customized workplace climate survey ready for deployment, along with a comprehensive administration plan. This survey will serve as a valuable tool for gathering insights into the workplace culture of the City of Mt. Pleasant, ultimately informing actionable strategies to improve employee engagement, leadership effectiveness, and overall workplace satisfaction. By incorporating stakeholder input and adhering to best practices in confidentiality and data security, we aim to foster trust and encourage honest participation from all employees.

## **Phase 3: Survey Implementation**

Following the final approval of the survey by the Project Team, we will initiate a comprehensive administration process tailored for all 125 employees of the City of Mt. Pleasant, including full-time and part-time union and management staff. Our primary objective during this phase is to ensure a smooth rollout that maximizes participation and captures valuable insights into the workplace climate.

To raise awareness of the importance of the survey, we will implement a strategic engagement campaign utilizing various communication channels. Informational sessions will be held to explain the survey's purpose, highlight how the results will inform workplace improvements, and reassure employees about the confidentiality of their responses, fostering trust and transparency.

In addition to these sessions, we will use email communications to convey key details about the survey, including its purpose, timeline, and instructions for access. Leadership support will be actively encouraged, with City officials and department heads promoting

the survey and emphasizing its value. Follow-up emails will serve as reminders, reinforcing the importance of each employee's input and encouraging participation. Throughout the survey period, we will send timely reminders to keep the survey top-of-mind for employees, emphasizing the deadline for responses. These reminders will be shared through emails, team meetings, and internal communications, ensuring that all employees have multiple opportunities to participate.

To enhance engagement, we will provide ongoing support through a dedicated email address for any questions or concerns related to the survey process. A Frequently Asked Questions (FAQ) document will also be made available to address common inquiries, serving as a helpful resource. Additionally, to encourage participation, we may consider implementing incentives, such as a small raffle or recognition effort, to promote involvement and create a collaborative atmosphere.

The survey administration will take place over a four-week period, allowing ample time for completion. We will monitor participation rates closely and be prepared to implement targeted outreach strategies to boost engagement as needed, ensuring that the survey effectively captures the voices of the entire City of Mt. Pleasant workforce.

## **Phase 4: Analysis and Reporting**

Upon completion of the survey, our team will conduct a comprehensive analysis of the collected data, synthesizing both quantitative and qualitative insights to identify key themes and areas for improvement within the City of Mt. Pleasant's workplace environment. Effective analysis is essential for transforming raw data into actionable insights that inform strategic decision-making.

We will begin with a detailed examination of the quantitative survey responses to identify patterns, trends, and correlations. Key performance indicators such as employee engagement, morale, leadership support, communication, and organizational effectiveness will be assessed. Advanced statistical techniques will be applied to analyze relationships between different variables, allowing us to draw informed conclusions about the current organizational climate within the City's workforce.

Concurrently, we will conduct a qualitative analysis of the open-ended responses, providing deeper context to the numerical data. These responses will be systematically coded and categorized to identify recurring themes and significant insights that may not be evident in the quantitative analysis. For instance, if multiple employees highlight concerns about workplace communication or leadership support, these will be flagged as key themes for further exploration. This qualitative depth will enrich our understanding of employee perspectives and workplace experiences, ensuring that we interpret not just what employees think, but why they feel that way.

To further enhance our findings, we will perform individual follow-up interviews as necessary, allowing us to gain more nuanced insights into specific concerns raised in

the survey. These interviews will be conducted with a sample of employees from different departments and roles to ensure a well-rounded perspective.

Once the analysis is complete, we will compile our findings into a structured digital report that is clear, comprehensive, and easy to navigate. Visual representations, including graphs and bar charts will illustrate key trends and patterns effectively. The report will include the following elements:

1. **Executive Summary** – A concise yet comprehensive overview of key findings and actionable recommendations, enabling stakeholders to quickly grasp the most critical insights.
2. **Introduction** – Context for the survey, detailing its purpose and significance within the City of Mt. Pleasant. This section will cover:
  - Background information on the City’s workforce.
  - Research questions guiding the survey.
3. **Methodology** – A comprehensive account of the research approach, including:
  - **Data Collection Process** – Description of survey distribution, response rates, and efforts to ensure participation.
  - **Data Analysis Techniques** – Overview of the statistical and analytical methods used to interpret results.
4. **Results** – Findings will be presented in a structured format addressing key research questions, including:
  - **Quantitative and Qualitative Data** – A detailed presentation of survey responses, supported by charts, graphs, and tables.
  - **Trends and Anomalies** – Identification of patterns, outliers, and demographic variations influencing the results.
  -
5. **Recommendations** – Based on our analysis, we will provide targeted recommendations to address identified challenges and opportunities, including:
  - **Training or educational programs** to support leadership development, improve communication, or address specific workplace concerns.
  - **Tools or methodologies** for tracking the implementation and long-term impact of recommendations, ensuring continuous improvement.

In addition to delivering a detailed written report, we will present our findings to the City Commission, ensuring that key insights are communicated in a clear and actionable manner. This presentation will maintain the confidentiality of respondents while providing leadership with meaningful takeaways to guide future workplace initiatives.

By analyzing the survey responses through both quantitative metrics and qualitative insights, we will equip the City of Mt. Pleasant with a data-driven understanding of its workplace climate, allowing leadership to make informed decisions that enhance employee engagement, morale, and organizational effectiveness.

## Optional Services

As we conduct the workplace climate survey for the City of Mt. Pleasant, we recognize that the insights gathered may reveal areas that require deeper exploration. To address this potential need, we offer an optional scope of work designed to provide in-depth analysis and enhanced engagement with employees and stakeholders. This phased approach allows us to respond effectively to key findings from the survey while ensuring a comprehensive understanding of the City's workplace climate.

### In-Depth Analysis Options

If the survey results highlight specific themes or concerns that warrant further investigation, we can implement various methodologies to explore the organizational dynamics in greater detail. These options may include:

1. **Focus Groups** – Facilitating focus group sessions with diverse employee representatives to encourage open discussions on topics identified in the survey. These sessions provide employees with a structured yet interactive environment to share their experiences, opinions, and suggestions. Focus groups can help uncover underlying workplace sentiments and group dynamics that may not be evident in survey responses.
2. **Listening Sessions** – Hosting structured listening sessions to allow employees to express their perspectives in a more informal setting. These sessions foster candid discussions on workplace culture, departmental operations, and leadership effectiveness. Listening sessions help promote transparency and employee engagement while generating actionable feedback for City leadership.
3. **Thematic Workshops** – If the survey findings indicate systemic workplace challenges, we can organize workshops focused on key themes such as employee engagement, leadership development, communication, or other relevant topics. These workshops provide a platform for employees and leadership to collaboratively address concerns and develop strategies for improvement, ensuring that employees feel heard and valued.

Recognizing that every municipal organization has unique needs, we will tailor our approach to fit the specific context of the City of Mt. Pleasant. Our optional scope of work is flexible and can be customized based on the insights gleaned from the survey, ensuring that we focus on the most relevant areas for further analysis and engagement. This approach ensures alignment with the priorities of the City's leadership and workforce, supporting meaningful improvements in workplace culture and employee satisfaction.

At Zilo International Group, we are deeply committed to supporting municipalities and have a proven track record of delivering impactful projects. We are excited about the opportunity to partner with the City of Mt. Pleasant on this important initiative. We understand the significance of this effort in strengthening workplace culture and enhancing employee engagement, and we would be honored to collaborate with you.



# Privacy and Data Security

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Ensuring the highest standards of quality assurance and data security is of utmost importance in this survey research project. We are committed to implementing robust measures to maintain the integrity, confidentiality, and reliability of the collected data, and instill confidence in the stakeholders regarding the protection and ethical handling of the data. The following strategies will be employed:

## **Data Validation and Cleaning:**

- Implement thorough data validation procedures to detect and resolve any errors, inconsistencies, or missing data.
- Conduct data cleaning activities, including outlier identification, data verification, and data validation checks, to ensure the accuracy and completeness of the dataset.

## **Quality Control Procedures:**

- Establish comprehensive quality control procedures to guide all stages of the data collection process, including survey administration, response monitoring, and data entry.
- Regularly monitor and assess data quality, addressing any issues promptly and effectively to maintain the validity and reliability of the collected data.

## **Confidentiality and Privacy:**

- Adhere to strict confidentiality protocols to protect the privacy and anonymity of survey respondents.
- Implement appropriate safeguards to ensure that personal identifiable information (PII) is securely handled in compliance with relevant data protection regulations.

## **Compliance with Ethical Guidelines:**

- Adhere to ethical guidelines and best practices in survey research, ensuring that the survey process respects the rights and welfare of participants.
- Obtain necessary approvals and permissions, as required, from relevant ethics review boards or committees.

## **Training:**

- Provide specialized training to the project team members on data security protocols, ethical considerations, and quality control procedures.
- Maintain a qualified and trained team, equipped with the knowledge and skills necessary to handle sensitive data and adhere to rigorous quality assurance standards.

# Experience and Qualifications

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At Zilo International Group, we utilize a comprehensive and flexible methodology designed to meet the unique needs of municipal governments, public sector organizations, and higher education institutions. Our approach is adaptable, ensuring that each project is customized to address the specific challenges and goals of the organization while delivering actionable insights that drive meaningful outcomes.

With extensive experience working with local governments and higher education institutions, Zilo International Group has collaborated with numerous municipalities and universities to provide expert survey services, facilitate focus groups, and conduct in-depth research. Our work focuses on gathering valuable employee and community feedback to help city leadership enhance services, improve workplace culture, and inform strategic decision-making processes.

Below are a few examples of the types of projects we have successfully completed for municipal and public sector clients:

- **Government Agencies:** We have conducted comprehensive workplace climate surveys to assess employee morale, leadership effectiveness, and organizational culture. By utilizing both quantitative and qualitative research methods, we capture a wide range of employee perspectives, providing city leadership with data-driven insights and actionable recommendations to support workforce development and policy enhancements.

Additionally, we have facilitated in-depth focus groups with employees across multiple departments to uncover workplace challenges, improve team dynamics, and address communication barriers. Our structured approach includes custom discussion guides, expert moderation, and synthesized reports with targeted recommendations to strengthen collaboration, efficiency, and job satisfaction.

Beyond surveys and focus groups, we have conducted organizational assessments to help municipalities streamline operations, enhance service delivery, and improve internal communication. These assessments have supported initiatives aimed at boosting workforce engagement, fostering interdepartmental collaboration, and creating a more effective and inclusive work environment.

- **Local Communities:** We have designed and implemented community-wide surveys to evaluate public perception of city services, identify priority areas for improvement, and support strategic community development initiatives. Our methodology includes inclusive outreach strategies to ensure broad participation, particularly among underrepresented populations, enabling local governments to make equitable and informed decisions that reflect the needs and priorities of their residents.



- **Higher Education Institutions:** Our expertise extends to conducting campus climate surveys that assess both the academic and social environment within universities. We have led stakeholder focus groups with students, faculty, and staff to gather meaningful insights, ensuring that diverse perspectives are considered in institutional decision-making. Through detailed data analysis and strategic reporting, we have helped institutions enhance student engagement, foster inclusive campus cultures, improve academic programs, and guide resource allocation to better meet the evolving needs of the university community.

### **Salt Lake Community College (SLCC)**

*Alonso Reyna Rivarola* [alonso.reynarivarola@slcc.edu](mailto:alonso.reynarivarola@slcc.edu)

Zilo partnered with SLCC to perform a Cultural Work Environment Assessment to interview faculty, staff, and lower administration with the intent to discover the cultural environment and any implicit biases of the employees working at the College. We focused on vision, values, mission, and goals and how to convert those via an organizational design to create the culture that best serves the organization. The ideas are based on research of basic workplace needs and what creates employee commitment organizational goals.

### **The Oregon Cascades West Council of Governments (OCWCOG)**

*Alicia Lucke* | [alucke@ocwcog.org](mailto:alucke@ocwcog.org)

OCWCOG is an association of twenty cities, three counties, the Confederated Tribes of the Siletz Indians, and a port district. It serves as a forum for cross-jurisdictional cooperation and provides a wide array of services and resources to help communities solve problems and connects member governments, businesses, and individuals. Zilo was hired to research and facilitate discussions around the feasibility of a regional Bias Response System, and the subsequent public and regional support for a more localized system. The research includes bias response programs and approaches, research existing trainings, help facilitate community forums, and staff scheduled events which focus on DEI, Racial Justice and Bias.

### **City of Avalon 2023 Community Survey**

*Jocelyn Francis* | [jfrancis@cityofavalon.com](mailto:jfrancis@cityofavalon.com)

Zilo was recently hired to design, administer, and analyze the results of a community survey for the City of Avalon, California. The survey is being conducted by mail, electronically, and in person. It is being conducted in English and Spanish. The findings will be utilized for a variety of purposes, including the submission of state and federal grant funding requests.

### **Indianapolis Public Transportation Corporation / IndyGo**

*Lloyd Graham* | [lloyd.graham@indygo.net](mailto:lloyd.graham@indygo.net)

Zilo has partnered with IndyGo and working closely with the Board of Directors, Leadership Team, and various shareholders to address its diversity and inclusion issues. Zilo is conducting strategic planning, research, policy/procedure/program review and revision, statement creation, facilitation, surveys, benchmarking, and data collection

and analysis. DEI-inspired initiatives and priorities act as a compass for a multifaceted corporation moving in the direction of progress. With an approach to inclusive excellence and strategic planning process will provide an organizational roadmap.

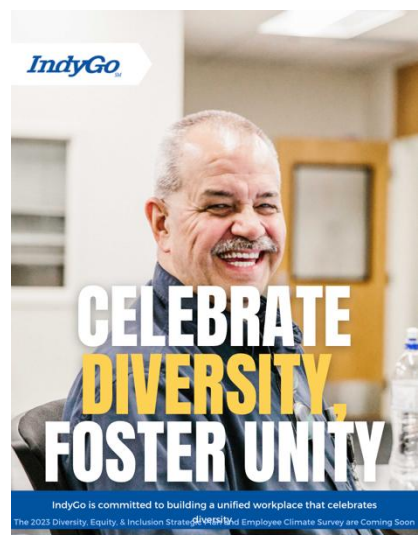
Excerpts of deliverables are below:

## IndyGo Employee Engagement Survey Final Report



## Employee Engagement Flyers for Outreach

Zilo International Group is pleased to draft multiple versions of internal flyers and/or email posts in order to best align with the IndyGo's brand. This includes the use of specific fonts, colors, or sizes to match existing branding materials.





# Staffing

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Founder and Chief Executive Officer Milena Zilo will be the primary point of contact and project lead on this engagement. Our team operates with a high degree of professionalism, characterized by seamless collaboration and effective communication. Each member brings their unique skill set to the table, contributing to a collective synergy that enhances our overall performance. In this collaborative environment, ideas are exchanged fluidly, and a sense of mutual respect prevails. The structure is designed to promote open dialogue, ensuring that every team member's perspective is considered valuable. This professional collaboration fosters a dynamic work culture where each individual's strengths are harnessed for the collective success of the team.

Below please find biographies of the key consultants that will be assisting on this project and relevant experience.

## **Milena Zilo** **Founder and Chief Executive Officer**

Milena Zilo has 20 years of experience in Wall Street and International Consulting. She has worked with government officials and business professionals in organizations of different sizes in multiple industries, both domestically and internationally.

She has visible level of leadership interaction and collaboration with multi-disciplinary teams in all key areas of the organization, board members and executive team, as well as external stakeholders. Milena has experience with due diligence and valuation analysis, business tribulations and suggesting solutions to improve efficiency, reducing cost structure, and accelerating growth while optimizing performance, and realigning organization impact with overall strategy. She has experience with quantitative, qualitative, and secondary research, focus group moderating, stakeholders interviews, and has designed and supervised the administration of numerous surveys. She specialized in the management of large data collection projects and planning and coordinating complex tasks.

Milena has lead teams in strategic planning, demand assessments, and merger and acquisitions. She has extensive experience managing the financial planning and analysis for budgeting, forecasting, benchmarking and long range strategic planning on several projects, while ensured maintenance of appropriate internal controls and financial procedures. She has experience with evaluating enterprise risk through mitigation planning, implementation, and progress monitoring. With a genuine passion for making a positive impact, Milena strives to empower organizations to build strong and resilient organizations, where every voice is heard, and collective aspirations are turned into actionable solutions.

Milena graduated from the University of Denver with a bachelor's degree, majoring in Finance and double minored in Economics, and Legal Studies. At DU, she held numerous leadership positions. She is actively involved in the community and currently serves on the U.S Global Leadership Coalition's Colorado Advisory Committee and Denver Art Museum. She has served on several other committees and non-profit boards and has a passion for philanthropy and serving the community.

## **Lorena Batkalin, PMP** **Strategic Director**

Lorena Batkalin has 20 years of experience in consulting, with a strong focus on research and survey-based methodologies. She is a certified Project Management Professional (PMP) and has led numerous projects that emphasize data collection, stakeholder outreach, and community engagement. Her experience spans start-ups, Fortune 500 companies, and public sector organizations across diverse industries.

Lorena has a deep knowledge of engagement-based design methodologies, synthesizing information from residents, stakeholders, site surveys, and regulatory frameworks. She has demonstrated the ability to gather, analyze, and present data that informs strategic decisions and drives impactful results. Her approach ensures that survey and research initiatives are aligned with best practices and organizational goals.

Lorena is passionate about inclusivity and equity in community engagement. She integrates principles of social justice into her work, ensuring that marginalized populations are represented and empowered in decision-making processes. Her expertise in promoting diversity and inclusivity within engagement efforts has been a key factor in her success.

Lorena holds a bachelor's degree from Metro State University of Denver and a postgraduate degree in Accounting from Raritan College. She has served on numerous committees at the City of Aurora in Colorado including the Diversity, Equity, and Inclusion (DEI) Committee, where she represents the Information Technology Department.

## **Alexandra McGroarty, CDP, CPC, SHRM-PASC** **Senior Consultant**

Alex is an accomplished and results-driven Human Resources consultant and leader bringing expertise on the local and global level in implementing engagement, retention, and diversity measures that focus on the employee lifecycle from talent acquisition to the development of colleagues. She has held internal Human Resources positions in several large institutions and has broad experience in improving both individual performance and organizational effectiveness. She is a trusted advisor and coach with experience in developing and leading Diversity, Equity, and Inclusion Councils,

Employee Resource Groups, and Sustainability initiatives. Additionally, Alex has worked on numerous projects in HR Project Management (HRIS, Strategy, Org Design) and Change Management.

She enhances individual development and personal effectiveness using coaching and feedback, training, and leadership development initiatives. She uses a wide variety of assessment tools and resources in the development process that is tailored to the specific objectives of each unique situation. She also specializes in organizational effectiveness and has expertise in the areas of talent management, performance management, 360° assessments, succession planning, strategy integration, team building, and change management. She has a track record of enabling organizations and teams to better serve their customers and anticipates future needs. Alex also brings her expertise in the area of survey research and statistical analysis to develop and execute business strategies and focus change management efforts.

Alex was a finalist in the 2021 HR Person of the Year Awards and 2022 Ragan National Platinum HR Awards and in 2022 received Ragan's Women of HR – Executive Coach. She is also a published author of Bridging the Gap- Reducing Gender Bias in the Workforce.

Alex has a BA in Communication Studies Organizational from Rowan University and a Master of Science in Administration from Utica College. She holds a Certified Diversity Professional certification issued by the National Diversity Council and a Certified Professional Coach certification. Alex recently obtained a Graduate Certificate in Corporate Sustainability from Cornell University and her SHRM-PASC, the People Analytics Specialty Credential. She is also a member of the Human Resources Association of Southern New Jersey.

# Cost Proposal

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We propose a fee-based engagement in the amount of \$31,000, the fee is inclusive of all expenses associated with secretarial support, report production, and any expenses associated with the completion of the project.

We understand there are budgetary constraints on this project and are open to fee negotiations as requirements are determined and finalized. We will ensure and work with your team to stay within the appropriate budget and not to exceed those amounts.

## **Project Kick-Off and Follow Up Meetings**

- **Preparation and Facilitation:**
  - Estimated Cost: **\$3,000**
  - Description: Preparation of materials, facilitation of the meeting, and follow-up documentation, ensuring all objectives and protocols are clearly established.

## **Survey Design and Development**

- **Customized Survey Design:**
  - Estimated Cost: **\$1,500**
  - Description: Design and development of the workplace culture and climate survey, incorporating feedback from the Project Team and aligning with best practices.

## **Survey Administration**

- **Administration and Distribution:**
  - Estimated Cost: **\$15,000**
  - Description: Digital distribution of surveys, management of responses, and collection of data, with robust tracking mechanisms to ensure integrity.
  - Creation and execution of a comprehensive communication strategy (emails, informational sessions) to boost participation and engagement.

## **Employee Interviews and Follow-Up Discussions**

- Estimated Cost: **\$2,000**
- Description: Conduct one-on-one interviews and follow-up discussions with selected employees to gain deeper insights into key themes identified in the survey. This process will allow for a more nuanced understanding of workplace concerns, leadership dynamics, and organizational culture. The interviews will be confidential and structured to encourage candid feedback, helping to refine recommendations and develop targeted strategies for improvement.

## **Data Analysis**

- **Data Analysis and Interpretation:**



- Estimated Cost: **\$4,000**
- Description: Rigorous analysis of collected data, including both quantitative and qualitative insights, with a focus on identifying key themes and actionable areas for improvement.

## Reporting

- **Report Compilation:**
  - Estimated Cost: **\$5,000**
  - Description: Development of a comprehensive digital report that includes detailed findings, visual representations of data, and clear recommendations for action.
- **Presentation Preparation:**
  - Estimated Cost: **\$500**
  - Description: Creation of high-quality presentation materials to effectively convey findings and facilitate discussion among stakeholders.

## Optional Scope of Work (if applicable)

- **Onsite Focus Groups**
  - Estimated Cost: **\$6,000**
  - Description: Facilitation of structured focus group sessions with diverse employee representatives to encourage open discussions on key themes identified in the survey. Includes comprehensive preparation, moderation, data synthesis, and reporting of findings to inform strategic recommendations.
- **Onsite Listening Sessions**
  - Estimated Cost: **\$5,000**
  - Description: Hosting structured listening sessions to provide employees with a platform to share their perspectives in an informal yet guided setting. These sessions will foster candid discussions on workplace culture, leadership effectiveness, and operational challenges, promoting transparency and actionable feedback for City leadership.
- **Thematic Workshops**
  - Estimated Cost: **\$6,000**
  - Description: Development and facilitation of targeted workshops focused on critical areas such as employee engagement, leadership development, communication, and team dynamics. These workshops will allow employees and leadership to collaboratively address concerns, generate solutions, and develop action plans for workplace improvement.
- **Additional Analysis (if necessary)**
  - For any additional and ad hoc consulting services, Zilo International's hourly rate is **\$200**.

# Timeline

The following timeline outlines the key phases and milestones. This timeline is flexible and can be adjusted based on the specific needs and availability of the Project Team.

Phase	Activity	Duration	Target Date
<b>Project Kick-Off</b>	Initial meeting with the Project Team	1 day	Week 1
	Establish project objectives, scope, and timeline		
	Set communication protocols for ongoing meetings		
<b>Survey Design and Development</b>	Drafting customized workplace culture and climate surveys	2 weeks	Weeks 2-3
	Present drafts to Project Team for review and approval		
<b>Survey Administration</b>	Finalize and distribute surveys and Interviews	4 weeks	Weeks 5-9
	Implement engagement campaigns for participation		
	Provide ongoing support and follow-up communications		
<b>Data Analysis</b>	Analyze survey results and synthesize insights	3 weeks	Weeks 10-13
	Identify key themes and areas for improvement		
<b>Final Report</b>	Compile findings into a comprehensive digital report	3 weeks	Weeks 14-17
	Create visual representations (graphs/charts)		
	Prepare presentation for the Project Team		
<b>Presentation of Findings</b>	Present findings to the Project Team	1 day	Week 18
	Facilitate discussion on identified challenges and recommendations		

# Certificates of Insurance



## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

09/17/2024

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<b>PRODUCER</b> Hiscox Inc. 5 Concourse Parkway Suite 2150 Atlanta GA, 30328		<b>CONTACT NAME:</b> PHONE (A/C, No, Ext): (888) 202-3007 FAX (A/C, No): E-MAIL ADDRESS: contact@hiscox.com	
<b>INSURED</b> Zilo International Group LLC 3939 E Arapahoe Rd Ste 210 Centennial, CO 80122		<b>INSURER(S) AFFORDING COVERAGE</b> INSURER A: Hiscox Insurance Company Inc NAIC #: 10200 INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:	

### COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMPIOP AGG \$ \$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A				<input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Professional Liability			P100.700.937.7	11/01/2024	11/01/2025	Each Claim: \$ 250,000 Aggregate: \$ 250,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

### CERTIFICATE HOLDER

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<b>PRODUCER</b> Hiscox Inc. 5 Concourse Parkway Suite 2150 Atlanta GA, 30328	<b>CONTACT NAME:</b>	
	<b>PHONE (A/C, No, Ext):</b> (888) 202-3007 <b>FAX (A/C, No):</b>	
	<b>E-MAIL ADDRESS:</b> contact@hiscox.com	
	<b>INSURER(S) AFFORDING COVERAGE</b>	<b>NAIC #</b>
	<b>INSURER A:</b> Hiscox Insurance Company Inc	10200
	<b>INSURER B:</b>	
	<b>INSURER C:</b>	
	<b>INSURER D:</b>	
	<b>INSURER E:</b>	
	<b>INSURER F:</b>	


**COVERAGES****CERTIFICATE NUMBER:****REVISION NUMBER:**

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INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY			P100.702.324.7	11/01/2024	11/01/2025	EACH OCCURRENCE \$ 1,000,000
	<input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR	Y	DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000				
			MED EXP (Any one person) \$ 5,000				
			PERSONAL & ADV INJURY \$ 1,000,000				
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE \$ 2,000,000
	<input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC						PRODUCTS - COMP/OP AGG \$ S/T Gen. Agg.
	OTHER:						\$
	<b>AUTOMOBILE LIABILITY</b>						COMBINED SINGLE LIMIT \$
	<input type="checkbox"/> ANY AUTO						BODILY INJURY (Per person) \$
	<input type="checkbox"/> ALL OWNED AUTOS						BODILY INJURY (Per accident) \$
	<input type="checkbox"/> HIRED AUTOS						PROPERTY DAMAGE (Per accident) \$
	<input type="checkbox"/> SCHEDULED AUTOS						\$
	<input type="checkbox"/> NON-OWNED AUTOS						\$
	<b>UMBRELLA LIAB</b>						EACH OCCURRENCE \$
	<input type="checkbox"/> EXCESS LIAB						AGGREGATE \$
	<input type="checkbox"/> OCCUR						\$
	<input type="checkbox"/> CLAIMS-MADE						\$
	DED. RETENTION \$						\$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b>						PER STATUTE OTH-ER
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	<input type="checkbox"/> Y/N	N/A				E.L. EACH ACCIDENT \$
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE \$
							E.L. DISEASE - POLICY LIMIT \$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

**CERTIFICATE HOLDER****CANCELLATION**

	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
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## CERTIFICATE OF LIABILITY INSURANCE

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<b>PRODUCER</b> Pinnacol Assurance 7501 E. Lowry Blvd Denver, CO 80230	<b>CONTACT NAME:</b>	
	<b>PHONE (A/C, No, Ext):</b>	<b>FAX (A/C, No):</b>
<b>INSURED</b> Zilo International Group LLC 3939 E Arapahoe Rd #210 Centennial, Colorado 80122	<b>E-MAIL ADDRESS:</b> support@pinnacol.com	
	<b>INSURER(S) AFFORDING COVERAGE</b>	
	<b>INSURER A:</b> Pinnacol Assurance	
	<b>INSURER B:</b>	
	<b>INSURER C:</b>	
	<b>INSURER D:</b>	
<b>INSURER E:</b>		
<b>INSURER F:</b>		

<b>COVERAGES</b>	<b>CERTIFICATE NUMBER:</b>	<b>REVISION NUMBER:</b>
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	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:					EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY					COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$					EACH OCCURRENCE \$ AGGREGATE \$
A	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	<input checked="" type="checkbox"/> Y <input type="checkbox"/> N	N/A	N	4224555	06/25/2024 06/25/2025 X PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ 1000000 E.L. DISEASE - EA EMPLOYEE \$ 1000000 E.L. DISEASE - POLICY LIMIT \$ 1000000

<b>DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES</b> (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) Unless otherwise stated in the policy provisions, coverage in Colorado only. professional services
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<b>CERTIFICATE HOLDER</b> Zilo International Group 3939 E ARAPAHOE RD STE 210 Centennial, CO 80122	<b>CANCELLATION</b> SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE Pinnacol Assurance
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*Thank you for your consideration!*

Zilo International Group is held to the highest standard of excellence when committing to our clients' success. We would be honored to partner with you to achieve your goals.

---

Zilo International Group LLC  
3939 East Arapahoe Road, Suite 210  
Centennial, CO 80122  
[www.zilointernational.com](http://www.zilointernational.com)





# Employee Engagement Survey Proposal for the City of Mt. Pleasant

*Prepared by*



Bill Freund  
VP of Business Development  
CustomInsight, LLC  
bill@custominsight.com  
650.204.9055

February 17, 2025



# Employee Engagement Survey Proposal for the City of Mt. Pleasant

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## Cover Letter

City of Mt. Pleasant, Michigan  
City Hall  
320 W. Broadway  
Mount Pleasant, MI 48858

Dear Selection Committee,

CustomInsight appreciates the opportunity to submit this proposal to conduct a comprehensive Workplace Climate Survey for the City of Mt. Pleasant. With 25 years of experience in employee engagement and workplace analytics, we bring a data-driven, action-oriented approach to measuring and improving organizational climate. Our Focal ORG™ survey platform ensures confidentiality, delivers real-time insights, and provides actionable recommendations for long-term improvements. In addition to helping many cities like yours achieve significant impact, it is also being used by the State of Michigan (for 47,000 employees statewide).

Our methodology integrates extensive research-based principles that allow organizations to diagnose engagement levels effectively and implement meaningful change. Our approach is designed to help organizations enhance transparency, establish trust, and create a more inclusive workplace culture that supports employee growth and development. The City of Mt. Pleasant will benefit from an industry-leading survey platform with expert guidance and full-service support at each phase of the project.

We look forward to the possibility of collaborating with the City of Mt. Pleasant to assess and enhance workplace culture. Please feel free to contact us for any clarifications.

Sincerely,



Bill Freund  
VP of Business Development  
CustomInsight, LLC  
bill@custominsight.com  
650.204.9055

# Project Approach

## Survey Design and Administration

- CustomInsight will design a comprehensive workplace climate survey tailored to the City's workforce of 125 employees. The survey will be carefully structured to assess various aspects of employee experience, including engagement, leadership effectiveness, communication quality, teamwork, and inclusion. We will also ensure that all questions align with best practices in workplace assessment, making it easy for employees to provide honest feedback.
- The survey will be conducted in a completely anonymous and secure manner, ensuring that employees feel comfortable sharing their thoughts without concern for confidentiality breaches. Employees will access the survey via a secure, personalized link, eliminating barriers to participation.
- If necessary, follow-up interviews will be conducted with selected participants to gather qualitative insights that further enrich the survey data.

## Data Analysis and Reporting

- Our advanced analytics engine will evaluate survey responses, identifying key trends, patterns, and potential areas for intervention. By leveraging benchmark comparisons from similar public sector organizations, we will be able to provide a clear picture of how the City of Mt. Pleasant compares to other entities in terms of workplace climate.
- Data will be visualized through interactive dashboards, heat maps, and percentile rankings, offering leadership an intuitive way to understand and act on results.
- AI-driven comment analysis will summarize qualitative responses, allowing leadership to quickly understand employee sentiment without manually reviewing every individual response.
- A comprehensive final report will be delivered, summarizing:
  - Key findings and themes from the survey results
  - Areas that require immediate attention
  - Actionable recommendations for leadership
  - Suggested training programs to address deficiencies
  - Tools for tracking improvements over time

## Presentation of Findings

- Our team will prepare and deliver an executive summary presentation to the City Commission, ensuring that all insights are conveyed effectively while maintaining respondent confidentiality.

- A remote debrief session will be scheduled with key stakeholders to review the results in detail and discuss strategic next steps. This session will be structured as an interactive dialogue, allowing leadership to ask questions and clarify any aspects of the data.

## Experience and Qualifications

We have extensive experience conducting climate surveys for municipalities and government agencies. Below are some recent sample clients.

### Clients

Client	# of Employees	Since
Delta Township, MI	130	2025
City of Napa, CA	500	2022
City of San Leandro, CA	500	2022
City of Dallas, TX	13,000	2020
State of Michigan	47,000	2024
State of Colorado	40,000	2024

### Projects

Each of these projects (listed above) involved survey administration, data analysis, reporting, and strategic recommendations to improve workplace climate. Most have/will complete the survey annually. We specialize in customized solutions to address complex workforce challenges and enhance engagement levels across all tiers of an organization.

While our employee engagement survey includes upward-feedback about managers across the organization, we also provide 360-degree feedback assessments for cities like yours, such as City of Kalamazoo, MI (since 2023).

### Staffing

The team that would help your organization is the same one that has helped the clients listed above—and many others like them. With decades of experience and education from top universities, we are well prepared to assist.

Name	Position	Role	Years in Role	Education
Bill Freund	VP of Business Development	Oversight and strategic consultation	10	Harvard MBA
Dave Gutzman	Principal	Data analysis and reporting	25	Stanford
Christine Ipolyi	Client Service Director	Project management and implementation	20	U.N.C. Chapel Hill

## Cost

Service Component	Cost
Annual License	\$4,000
Survey Design & Administration	\$2,000
Data Analysis & Reporting	\$4,000
Action Planning (integrated and AI-infused)	Included
Progress Checks (integrated pulse surveys)	Included
Presentation to City Commission	Included
Ongoing Support & Consultation (a few hours)	Included
<b>Total</b>	<b>\$10,000</b>

## Timeline

Milestone	Estimated Timeframe
Project Kickoff	Week 1
Survey Development	Weeks 2-3
Survey Administration	Weeks 4-5
Data Analysis & Report Generation	Week 6
Presentation to City Leadership	Week 7
Implementation of Recommendations	Ongoing
Follow-up Pulse Surveys	Bi-Annual

## Conclusion

We are confident that our expertise and Focal ORG platform will provide the City of Mt. Pleasant with valuable insights to enhance its workplace climate. Our survey solution offers an unparalleled ability to diagnose, track, and drive meaningful change in employee engagement and organizational culture. We believe that a data-informed approach will enable the City to foster a more inclusive, collaborative, and high-performing workplace environment.

We are committed to partnering with the City of Mt. Pleasant to ensure the successful execution of this initiative and provide continuous support for long-term success.

For further information, please contact us at [bill@custominsight.com](mailto:bill@custominsight.com) or 650.204.9055.

# Sample Results

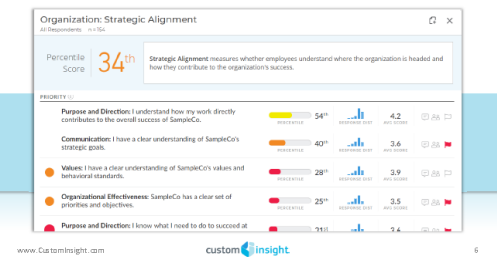
## INTERACTIVE DASHBOARD

Our dashboard is an intuitive web-based analysis tool. It shows how your organization is performing on key success factors, compared to other organizations, and identifies your top priorities.



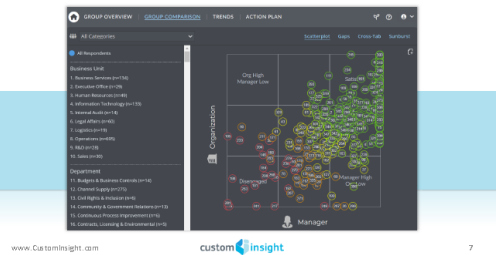
## ITEM DETAILS

View results by survey item to focus on priorities. Click items to see comments for them, as well as our insight & advice. Flag items to add them to your plan.



## GROUP COMPARISON (SCATTERPLOT)

Regardless of how organizations are doing overall, there are always issues lurking deeper. We help you pinpoint problem areas for precise action.



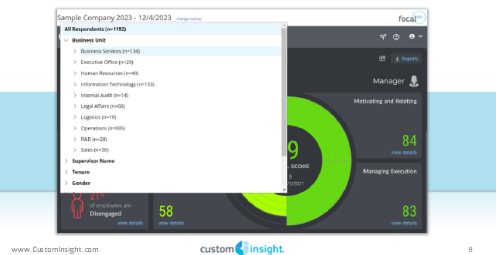
## GROUP COMPARISON (SUNBURST)

Our hierarchical heat map enables you to see where low scores traverse layers of the org. You can click on any segment to zoom in for details.



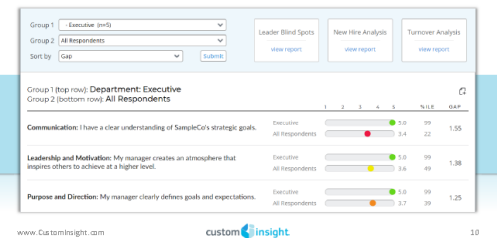
## FILTERING & SHARING

Filter your results by any of group and instantly share them with any employee. Filtering by individual manager provides a "mini-360" for each of them.



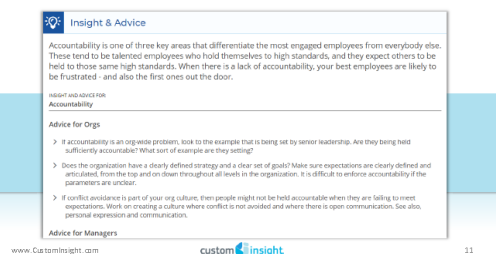
## GAP ANALYSIS

Boost retention by comparing results for employees who left with those who stayed. Uncover leader blind spots by comparing their responses to the rest of the organization. Improve onboarding by checking gaps for your new hires.



## INSIGHT & ADVICE

Integrated insight & advice provides expert guidance at the survey item level to help you understand issues better and take corrective action.



## COMMENT ANALYSIS

Using Artificial Intelligence, we summarize key themes from the written comments, and indicate the number of comments included for each. Clicking any theme enables you to view the comments rolled into the summary.



## CONVERSATIONS

Clicking next to any written comment in the dashboard enables you to initiate an anonymous email conversation with the person who wrote it. This follow-up functionality can be used to request clarification and/or express appreciation.

The screenshot shows a feedback loop in the dashboard. At the top, a comment from a manager states: "My manager/supervisor gives me the freedom I need to do my job effectively. There's a lot of freedom in almost no oversight. However there's also no real authority either." dated Monday, October 15, 2018. Below this, a blue button says "Thank you for your feedback on the recent employee survey. Could you please elaborate on this comment?". A response from the employee follows: "When my manager is not around, it is hard to make progress since important decisions can't be made." dated Monday, October 15, 2018. A "SEND" button is visible at the bottom right of the response box.

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## ACTION PLANNING

Using cutting-edge AI, dashboard users can automatically receive customized action plans, comprised of goals and tasks that are tailored to their situation.

The screenshot shows the "Action Plan" section. It includes a "Flagged Items (1)" section with a "view flags" link. Below is a "My Goals (7)" section with a "create new goal" button. A specific goal is highlighted: "Goal #1: Build and maintain a cohesive, inter-connected and collaborative sense of teamwork on my team." It shows a progress bar at 6/7 tasks complete. Underneath, it lists "What: Teamwork - It really feels like everybody is on the same team at SampleCo." and a "Tasks" section with a "view tasks" link. At the bottom, there are links for "Get task recommendations" and "Insight & Advice".

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## PROGRESS CHECK

To ensure improvements are on track, send shorter pulse surveys for any flagged survey items or goals to any employees at any time.

The screenshot shows the "Progress Check (Pulse)" interface. It has two main sections: "Select the type of feedback that you would like to receive" and "Select which survey items to include". The first section has a "Progress Check (Pulse)" option with a description: "Get feedback on your progress. Select items for how to adjust for greater impact." The second section lists "ACTIVE GOALS" and "FLAGGED ITEMS". Under "ACTIVE GOALS", there is a goal: "Purpose and Direction: I know what I need to do to succeed at SampleCo." with a "view completed goals" link. Under "FLAGGED ITEMS", there are two items: "Respect for Management: The leaders of SampleCo really know what they are doing." and "Communication: I have a clear understanding of SampleCo's strategic goals." Each item has a checkbox and a radio button for selection.

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## TRENDS

See how actions have impacted key metrics and drill into the biggest changes by group and survey item. Celebrate successes and get the credit you deserve.

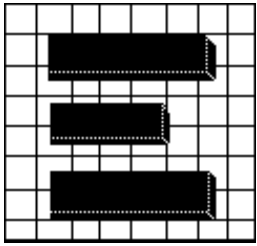


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## EPIC ▪ MRA

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Highway, Suite 2C  
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P: 517-886-0860  
E: [kelly@epicmra.com](mailto:kelly@epicmra.com)  
O: [www.epicmra.com](http://www.epicmra.com)

February 19, 2025

City of Mt. Pleasant  
320 West Broadway  
Mt. Pleasant, MI 48858

### **RE: RFP Consultant Services for Workplace Climate Survey**

To Whom It May Concern:

This writing, submitted on behalf of Michigan Researchers Associates, Inc. dba EPIC ▪ MRA, is intended as the requisite *Cover Letter* included as part of the *Proposal Requirements* found on page 2 of the above-referenced RFP. In further compliance with that portion of the RFP, the firm offers the following description of the company, its history, qualifications, and relevant experience:

EPIC ▪ MRA is the assumed name for Michigan Researchers Associates, Inc., a for-profit corporation formed in 1991 with headquarters in Lansing, Michigan. It is the successor entity to the partnership, Michigan Research Associates, formed in 1985. The principal officers of EPIC ▪ MRA have been active in governmental, political, marketing, business, and health issues at the state and national levels for over 40 years. Since its inception, the firm has provided quantitative and qualitative research services to a broad range of clients, including municipalities, community colleges and universities; public and intermediate school districts; state, county, and local legislative bodies; taxing authorities and planning commissions; non-profit organizations; and a host of private and membership organizations.

EPIC ▪ MRA takes great pride in the accuracy of its research. In the November 2022 election, EPIC ▪ MRA held the distinction of being the most accurate polling firm in predicting the outcomes of the 2022 races for all the statewide offices in Michigan - and the three ballot proposals - on surveys conducted for its media partner consortium of the Detroit Free Press, WLNS TV 6, WOOD TV 8, and WJRT TV 12. Further information about the firm and our prior work can be found at: [www.epicmra.com](http://www.epicmra.com)

As for targeted stakeholder work, the firm has been frequently engaged in such services since its inception and has frequently utilized this quantitative research method for clients. We appreciate your consideration and your trust in our services.

Best,

Kelly Sullivan, Project Director  
EPIC ▪ MRA

- Educational
- Political
- Industrial
- Consumer

- Market
- Research
- Analysis

**A PROPOSAL TO CONDUCT CONFIDENTIAL  
QUANTITATIVE RESEARCH SERVICES FOR  
STRATEGIC PLANNING:**

**Request for Proposal:  
Consultant Services for Workplace Climate Survey**

Prepared For:

**The City of Mt. Pleasant, MI**

Prepared By:

**EPIC ▪ MRA**

February 2025

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## ***I. Project Approach***

For the research contemplated in this proposal, it is the belief of EPIC ▪ MRA that an online survey would be the most efficient means, both in terms of cost and timeframe, of capturing City employee opinions. EPIC ▪ MRA would work closely with designated City officials to glean topics of interest and generate unbiased questions to that end and would also work closely with the City designated officials to draft and redraft the questionnaire until a final version that is acceptable and approved by all parties is created.

EPIC ▪ MRA would also create invitation language that would be sent to all City employees via email solicitation to participate in the survey. Those emails would also include a direct link to the survey itself, as well as information about why the City is conducting the research and further assure respondents of the confidentiality of their responses by noting that EPIC ▪ MRA - an independent third party - has been commissioned to administer the project, and that no identifying information of any kind will be presented, or turned over, to the City. Furthermore, all respondent communications would contain the name, telephone number, and email address of Mr. Kelly Sullivan - Project Director of EPIC ▪ MRA - should respondents have any questions, or concerns about the integrity of the project.

EPIC ▪ MRA would look to the City of Mt. Pleasant to provide the sample pool of potential respondents; essentially, the names, email addresses, and telephone numbers of all City employees. EPIC ▪ MRA would be responsible for sending initial invitations to participate in the survey to the respondent pool, and reminder invitations to participate as needed. If deemed necessary, EPIC ▪ MRA would also conduct telephone follow-up interviews with survey non-respondents in order to obtain as robust a sampling as possible for data analysis and reporting purposes. It is envisioned that the survey's "open for participation" period would last approximately two weeks.

Upon completion of the data collection phase of the project, manual data entry is performed in the form of coding and grouping any open-ended questions, making the data then ready to apply to our aggregation and tallying software.

The results of the tabulations are known as:

- Frequency results - the percentage of all respondents saying "yes, no, undecided, don't know/refused, etc." or all other responses to survey questions; and,
- Cross tabulation tables - the tabulation of responses to individual questions by segment (that is, demographic and geographic subgroup) such as employee type, years of service, gender, age, City department, income, geographic location, etc.

The frequency results are useful in gauging overall reaction to specific questions posed, and for garnering an understanding of what the attitudes of the population are as a whole. The cross tabulations are beneficial in getting a handle on how particular segments (e.g. new hires v. veteran employees, men under age 50, etc.) of the population react to any given question in comparison to the entire sample. The comparison of frequency results with the cross tabulations is useful in analyzing the attitudes of subgroups toward various issue questions, authoring a detailed analysis of the findings, and making recommendations.

EPIC ▪ MRA is well aware of the fact that the survey, its cost, and its results, are subject to the Freedom of Information Act when commissioned by a public entity, and thus, open to public scrutiny. However, our firm has great experience in taking on public entities as clients, and we pride ourselves on our ability to craft an unbiased survey instrument and present results in a manner that justifies the expenditure of public dollars. Moreover, our services include the offering of an oral presentation of results which, more often than not, can be delivered as part of a regularly scheduled board meeting.

As the *Project Commencement* and *Completion of All Deliverables* dates remain “TBD” as stated on page 3 of the RFP, an example timeline, from inception to completion of the work contemplated in this proposal, is presented under section **V. Timeline** of this proposal.

## ***II. Experience and Qualifications***

### Macomb Community College

#### *Project Description:*

In June of 2021, and again in July of 2023, EPIC ▪ MRA conducted the 400 sample, 12-minute Macomb Opinion Survey to assist Macomb Community College in identifying current attitudes and trends while tracking community issues and topics of particular interest to the college, such as: the state of the local economy, family financial outlook, problems facing the community, opinions of Macomb Community College's strengths and weaknesses, and other issues of interest. The information gleaned from reports of the surveys' findings, gathered every two years, has been used by the college to improve programs, practices, course offerings and services, as well as community outreach.

Contact:                      Deirdre Syms, Director of Institutional Research  
Macomb Community College  
586-445-7862

### Peninsula Township, Grand Traverse County, MI

#### *Project Description:*

In July of 2019, the Peninsula Township Board of Trustees called on EPIC ▪ MRA to conduct a dual methodology survey of residents to assist township officials in developing their strategic plans for this unique part of the state. The research began with administering a 200-sample live operator telephone interview survey in the last week of September. Using the Secretary of State's qualified voter file, augmented by a file supplied by the Township assessor's office, a mailing list of approximately 3,800 unique addresses was assembled, to which a post card was mailed. The postcard, bearing the Township's logo instructed recipients how to access an on-line version of the just-administered live operator interview or alternatively, how to obtain a hard copy version of the survey instrument. After an "open period" of three weeks, a total of 980 usable responses were obtained. Data from these surveys continues to be used to assist the township in planning around issues involving wineries, lakefront access, recreational vehicle storage, short-term rental regulation, landscape preservation, and a host of other land use and related topics of local importance.

Contact:                      Mr. Randy Mielnik, Director of Planning  
Peninsula Township  
231-223-7117

## Michigan District Judges Association (MDJA)

### *Project Description:*

In October of 2021, EPIC ▪ MRA conducted an online study for the MDJA among a discrete audience of 255 members, with over half of the qualified sample pool ultimately participating in the survey (a total of 132 respondents). The primary purpose of the survey was to solicit the comments of Michigan judges presiding over district court dockets about their experiences with implementing remote court proceedings under emergency order, their opinions and attitudes toward the prospect of a more permanent adoption of remote and virtual proceedings under court rule, recommendations for types of hearings best and worst suited for remote technology, likes and dislikes on a variety of pertinent issues, and how to best implement newly emerging best practices going forward.

Contact:                      Honorable Raymond Voet, President-Elect  
Michigan District Judges Association  
855-520-2974

## Park Township, Ottawa County, MI

### *Project Description:*

In February of 2019, the Park Township Board of Trustees commissioned EPIC ▪ MRA to conduct a dual-methodology study of residents to test attitudes and opinions toward potential uses for the township airport, notably a proposal for development of a multi-use educational, recreational, and active-service airfield known as the “Air Park.” In May, a 300-sample live operator telephone interview was conducted among residents, stratified closely to the population distribution in the jurisdiction. Upon completion of the telephone survey, all unique residential addresses in the township were compiled into a mailing list, and post cards were sent via First Class mail to the resulting approximately 6,900 addresses. The post card, bearing the Park Township logo, informed the recipient household of the reason for the communication, instructions as to how to participate in the survey online (which contained identical questions to the telephone survey questionnaire), or, in the alternative, how to contact EPIC ▪ MRA to request a printed copy with a postage paid return envelope or for assistance in obtaining a hard-copy version of the questionnaire from County offices. Ultimately, over 830 samples were obtained from the online/direct mail survey efforts and, when taken with and juxtaposed against the findings from the live operator telephone portion of the project, were used to assist the Township Board of Trustees in the determining how to proceed with the future of the township-owned parcel.

Contact:                      Mr. Gerald Hunsburger, Supervisor  
Mr. Howard Fink, Township Manager  
Park Township  
616-399-4520



### ***III. Project Staffing***

**Mr. Bernie Porn, *Founding Principal and President***, is a partner and President of EPIC ▪ MRA. Drawing on nearly four decades of research and communication experience, Mr. Porn's primary role with the firm involves the writing and analysis of the survey research conducted for most of EPIC ▪ MRA's clients. He is also looked to by members of the media, academia, and others for commentary on the wide spectrum of topics researched by the firm. He consults regularly on the topic of developing bias-free survey instruments, and his expertise in the drafting of bias-free instruments and his attention to sampling detail have made him a popular guest lecturer at several of Michigan's community colleges and universities.

For the purposes of this project, Mr. Porn will be primarily involved in assisting in the refining of the survey instrument and preparing the written analysis of findings with recommendations.

Mr. Porn is a graduate of Aquinas College in Grand Rapids, majoring in urban affairs and schooled in statistics. Prior to founding EPIC ▪ MRA, he worked on the staff of the Michigan House of Representatives for nineteen years, serving as the Director of Communications from 1990 to 1992.

**Mr. Neal Richey, *Data Processing Systems Manager***, is responsible for most of the firm's custom programming and sample production needs and oversees the firm's work-station system and data entry network. Mr. Richey's experience with data processing and custom programming work spans over thirty-five years.

Mr. Richey's primary role in this project will be to manage respondent databases and issue invitations to participate in the currently envisioned online survey for City of Mt. Pleasant employees. He will also have primary responsibility for programming the firm's SPSS software package to produce the requested deliverables.

**Mr. Kelly Sullivan, *Project Director and Office Manager***, is responsible for oversight of all tasks performed outside of the office, as well as assisting in the discharge of the myriad administrative details associated with all projects. He began his tenure with the firm over twenty-five years ago as a part-time interviewer, and his work ethic and attention to detail earned him a full-time salaried position with the company after earning his B.S. in Mathematics from Michigan State University in 1999. Mr. Sullivan will work closely with Mr. Porn and Mr. Richey in discharging all tasks associated with all project components and will partake in all presentations made to the City Commission.

## ***IV. Cost Proposal***

EPIC ▪ MRA is pleased to present a fixed price proposal for the instant project, inclusive of all deliverables, including:

- Ongoing telephone/virtual consultations to develop the questionnaire
- Design, hosting, and administration of a comprehensive online workplace climate survey to all City of Mt. Pleasant (approximately 125 employees).
- Draft appropriate language for email invitations to participate in the online survey assuring confidentiality.
- Issue email invitations to participate in the online survey to all qualified respondents.
- Issue reminder email invitations to participate as necessary.
- Perform up to 10 hours of individual follow-up interviews via telephone as necessary.
- Coding and grouping of any open-ended responses.
- Presentation of topline results (the Frequency Report) and Cross Tabulation tables.
- Analysis of the survey responses and the preparation of a detailed report summarizing key findings, trends, and recommendations for improvement.
- Make recommendations where applicable for any training or educational programs based on the findings to address specific areas of improvement.
- Suggest tools or methodologies where applicable for tracking the implementation and impact of recommendations over time.
- One presentation of the findings to the City Commission while maintaining the strict confidentiality of respondents.

### **TOTAL COST FOR SERVICES: \$6,450.00\***

\* Additional in-person meetings/presentations carry an additional fee of \$500.00 per meeting per day inclusive of travel. Additional hours (above 10) of work performed conducting individual follow-up telephone interviews will carry an added cost of \$50 per hour.

If awarded, EPIC ▪ MRA will provide “proof of the required insurance” policies to the City of Mt. Pleasant as required and stated on page 3 of the RFP and further defined in the *Administrative Memo #8-78* on pages 4 and 5 of the RFP.

## ***V. Timeline***

Once a survey has been commissioned, we begin close consultation with the client to develop a survey instrument. The initial draft is then presented to the client for review and comment; with the review and re-draft process continuing until a questionnaire that is satisfactory to all parties is developed. Typically, this phase consumes a fair share of what is normally a *six-to-eight week* timeline for completion of the research, from initial consultation through presentation of the final deliverables. However, presuming the construction and finalization of the survey instrument to be used can be expedited, a more contracted timeline can often be accommodated.

Regardless of when the survey research is desired, a potential timeline for the online survey research contemplated in this proposal could be:

<b><u>DATE</u></b>	<b><u>ACTIVITY</u></b>
February 24, 2025	Contract Award
Weeks 1 through 2	Initial and ongoing consultation with designated staff
	Presentation of questionnaire draft(s) for review, comment, and refinement
	Receive final comments and suggested amendments to questionnaire/pre-field programming and testing
Weeks 3 through 4	Invitations to qualified participants delivered via email Survey open for participation/data collection
Weeks 4 through 5	Reminder invitations to qualified participants delivered via email and/or follow-up phone calls made as needed
Weeks 5 through 6	Process data, present frequency report (top line results)
Weeks 5 through 6	Present cross-tabulation report
Weeks 7 through 8	Analyze data; develop and present textual report with recommendations
TBD	Oral presentation of survey findings; if desired



mejorando group

## PROPOSAL

February 20, 2025

*Mt. Pleasant*  
[meet here]

# ***Workplace Climate Survey Services***

Submitted By:

Patrick Ibarra  
The Mejorando Group  
13 Muirfield Road  
Cumberland, Maine 04021  
925-518-0187

[www.gettingbetterallthetime.com](http://www.gettingbetterallthetime.com)

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February 20, 2025

Aaron Desentz  
City Manager  
City of Mount Pleasant

Dear Mr. Desentz:

The Mejorando Group is pleased to offer our expertise to the City of Mount Pleasant as a partner engaged in assisting your efforts at transitioning from the prevailing to the preferred workplace culture consisting of engaged, connected and productive employees. It's practically impossible to name even a single successful organization, one that is a recognized leader in its field of endeavor, which does not have a distinctive, readily identifiable organizational culture. Most scholars and practitioners now recognize that the culture of an organization has a powerful effect on its performance and long-term effectiveness. In short, while a healthy workplace culture does not guarantee high performance, it's almost impossible to achieve without it.

Workplace climate and workplace culture are essentially synonymous with factors which either accelerate or hinder employee performance and overall organizational effectiveness. They share many of the same dimensions. Each organization's culture already contains the components it needs to fuel successful transformation, and leaders can affect a lasting, positive culture by encouraging behaviors that promote those elements. You don't need to replace your old culture; you need to find the aspects of it that can help you move forward.

In brief, culture is the predominant attitudes, language, behavior and shared set of assumptions of the organization:

- *Attitudes* are the way people think and feel that affect behavior.
- *Language* is the words people use to describe their thoughts and feelings.
- *Behavior* is the way people act.
- *Shared set of assumptions* we all bring when we work together – our unspoken expectations of one another.

The Mejorando Group possesses extensive experience in partnering with local governments including the cities of Manteca (CA), Reno (NV) and Sunnyvale (CA) where strengthening their workplace culture was the focus. We pride ourselves on understanding the dynamics particular to local government and devising solutions that help to disrupt the status quo thinking of “we’ve always done it that way” and translate the forces of change into improved service delivery and a more effective organization.

An operating principle essential to a successful culture assessment is “participation breeds commitment.” Consequently, in our approach we have a strong emphasis on employee participation in both the assessment and implementation of recommendations.

Offering consultation, facilitation, and training, since 2002 our firm has provided organizational effectiveness services to client partners that help achieve the 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 to clients who are seeking new ways to improve constantly.

We welcome the opportunity to work with you and your employees. Please contact me at [patrick@gettingbetterallthetime.com](mailto:patrick@gettingbetterallthetime.com) or 925-518-0187.

Sincerely,



Patrick Ibarra  
Co-Founder and Partner  
The Mejorando Group



## A. SCOPE OF SERVICES

### 1. Project Background

Included in the City's 2025 Goals and Objectives, is to "Maintain Service Excellence." Conventional wisdom in government has been that the key to improving organizational effectiveness is the result of adding more resources – employees, funding, equipment, and technology – but that's been proven time and time again not to be accurate. One of the most effective means by which to achieve a higher level of organizational performance is to create and sustain a healthy workplace culture where people can excel and pursue their potential. The role of culture is similar to oil in an engine - it's what makes everything else work more smoothly, efficiently, and powerfully.

Within the City of Mount Pleasant, strategy is the driving direction, the grounds on which the organization can succeed/achieve its goals. And the operating model is how you plan to get there – the way that departments are structured and employees allocated/reporting relationships that will support the kinds of activity/work practices and process that help achieve that strategy. Culture is the third component: the motivation that drives and supports both other elements. It's the emotional commitment people feel (or don't feel) when the leaders describe the strategy. It's the commitment and passion that people bring to their roles, to the daily actions that will support any direction.

Cultures are important and powerful because they determine what your organization is capable of doing/accomplishing. An organizational culture is a collection of deeply held attitudes, entrenched habits, repeated behaviors, latent emotions, and collective perceptions of their workplace. Culture is, in essence, the shared set of assumptions we all bring when we work together – our unspoken expectations of one another. Leaders may be in a natural position to have a greater impact, but people at all levels are a part of the fabric. People in organizations naturally influence and are influenced by those around them; their attitudes, feelings, behaviors, and perceptions come to echo one another. The patterns of these interactions take on a presence that is greater than the behavior of any single individual. Everything coalesces into an informal but broad-based and well-established sense of what is appropriate and what is not: "how we do things around here." In fact, organizations have several sub-cultures within their workplace as defined by geography (facility where an employee reports to everyday), tenure, and department to name just a few.

A workplace culture that drove success in the past can become overly codified, rigid, and ritualistic. Over time, bold new moves become much more risky; new service delivery models may compete with existing approaches that threaten their continued application. Even when it's obvious that change will someday be necessary, it's not hard to find excuses to put it off just a little bit longer. As a result, City leaders are seeking to fortify their workplace culture so as to:

1. Remain adaptive in a rapidly changing environment.
2. Enhance the employee experience.
3. Conserve those elements of the culture, the “roots”, that are a source of positive emotional energy, strength and pride.
4. Establish a strong foundation of self-awareness, self-reliance, and a growth mindset of always moving forward.
5. Manage the evolution of the organization realistically.

Twenty first century talent, regardless of generational group, wants to associate with organizations that have a strong sense of purpose. Purpose shapes the organization’s culture and the employee experience. What employees experience in the workplace will dictate how they feel about the organization and how they share those feelings with colleagues. All this shapes the organization’s reputation as a place to work – otherwise known as the employer brand.

We recognize this reality is prompting the City of Mount Pleasant to experience change and consequently, leaders are interested in pursuing specific recommendations intended to fortify their workplace culture and employee morale as a driver of successful organizational performance.

## 2. Our Expertise

We exhibit a strong foundation in the understanding of human performance inside organizations and creating practical and impactful strategies and tactics to positively influence sustainable change. We recognize that a number of factors are involved to a greater degree while others are to a lesser degree. We ascertain their level of influence and then design proven strategies to positively impact the factors, so each is effective as an independent factor, as well as aligned with other factors, to ensure success.

Our “hands-on” approach and ability to collaborate with all levels, from field personnel through executive management and up to elected officials, enable us to integrate strategy, structure, process, quality, and culture to the desired end: optimal performance.

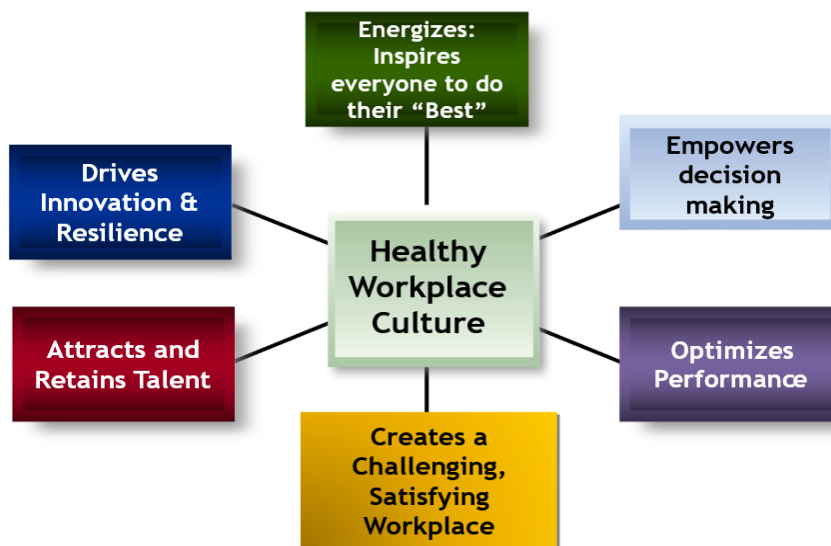
**Our firm is seriously interested in becoming a valuable partner to the City of Mount Pleasant** in your commitment to increasing organizational capacity. We have partnered with leaders from a number of local government organizations serving as the architect (designer) and implementer (contractor) of systematic and comprehensive Organizational Effectiveness Programs including:

- Completing in-depth assessments of the existing workplace culture(s).
- Collaboration with executives on targeted steps to embed the desired/preferred workplace culture.
- Facilitating leadership sessions with top executives to improve their individual and collective capabilities.

- Formal leaders do facilitate culture change, of course, but our work reveals that they don't do it alone – there are informal influencers. They are the people who are already in their daily jobs, demonstrating just the kind of behavior that you want to encourage. Enlisting their help is far more effective than taking strictly a top-down approach. In that regard, we facilitated a group of twenty like-minded employees in the City of Manteca (CA), referred to as “Common Threads” (i.e., Change Agents) that serve inside the organization and are critical enablers of change. Members of this group were trained in workplace culture, its benefits and coordinated implementation of various strategies and tactics associated with creating the preferred workplace culture.
- Modifying practices and work processes that reflect a “next practices” approach to performance improvement.
- Facilitating group development sessions with employees at various levels to (re)affirm mission, vision, values, and healthy workplace relationships including identifying specific behaviors and competencies.
- Adopting and implementing a Learning/Training and Development Program available for all levels of the workforce.
- Modernizing talent management practices to ensure hiring/selection, promotion, and performance appraisal practices are aligned with the preferred culture.

Our project approach will address the critical elements of change as we examine the role of workplace culture as a driver to improving performance.

Cultures are important and powerful because they determine what your organization is capable of accomplishing. The following diagram lists the benefits associated with a Healthy Workplace Culture:



### 3. Project Approach

A Workplace Culture Assessment provides a means of assessing the perceptions of an organization's employees and managers on the culture and proactively addressing issues of concern in the workplace. It can help determine what is working effectively in an organization and what is not.

There are many benefits to conducting a Workplace Culture/Climate Assessment:

- Identify Strengths and Areas for Improvement: It helps in recognizing the positive aspects of the current culture that should be preserved and the areas that need improvement.
- Improve Employee Engagement: Understanding the workplace culture can lead to strategies that enhance employee satisfaction and engagement, which are crucial for retaining talent and ensuring productivity.
- Enhance Communication: It can highlight communication barriers and provide a basis for improving information flow within the organization.
- Increase Efficiency and Performance: A well-assessed culture can align employees' values with organizational goals, leading to a more motivated and efficient workforce.
- Build Trust: Regular assessments demonstrate a commitment to transparency and employee well-being, which can build trust between management and staff.
- Guide Leadership Development: Insights from the assessment can help in developing leadership programs that promote a positive culture.

In essence, assessing workplace culture is a proactive step towards creating a healthier, more productive, and harmonious work environment.

**As outlined in our approach, each of the dimensions identified in the RFP will be addressed:**

- **Design and administer a comprehensive workplace climate survey to all City of Mt. Pleasant employees as defined above (currently 125 employees).**
- **Perform individual follow-up interviews as necessary.**
- **Analyze the survey responses and prepare a detailed report summarizing key findings, trends, and recommendations for improvement.**
- **Recommendations for any training or educational programs based on the findings to address specific areas of improvement.**
- **Tools or methodologies suggested for tracking the implementation and impact of the recommendations over time.**
- **Present the findings in the detailed report to the City Commission that maintains the confidentiality of respondents.**

Organizational culture is largely driven by leadership, but it also includes a wide variety of other factors, from organizational values and norms to behavior of employees. The following diagram includes the **Ten Dimensions (TD)** of a workplace culture:



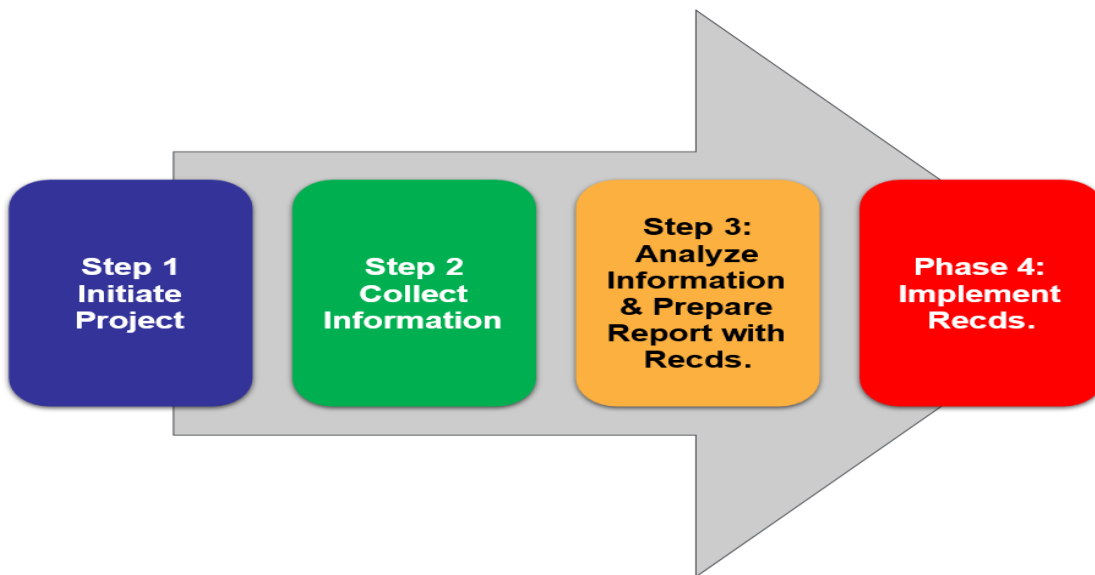
- **Mission, Vision and Values** – Employees understand the organization’s mission and vision and their particular role in their execution. When values are shared among employees, it can unleash their potential. When employees know the context and overarching purpose of their work, they tend to approach it with a clearer sense of purpose and meaning.
- **Employees’ Experience** – Employees feel their input is valued and flexibility is expected as it concerns work-life balance.
- **Teamwork** – Healthy group dynamics are the norm. Employees build and sustain healthy work relationships with peers, direct reports/subordinates, and supervisor/manager.
- **Hiring and Promoting for Fit** – A strong emphasis is placed on hiring, and promoting, for “fit” which includes being supportive of the preferred culture and criteria that goes beyond credentials/pedigree and years of experience. High-performing employees want to work in a performance-based promotional workplace.
- **Change and Innovation** – Change and innovation are discussed frequently among employees and pursuing improvements to current operations, services and programs is supported. Change management is not an event but instead is a process that is inclusive and collaborative. Moreover, the organization has a proven track record of successfully implemented change initiatives that have resulted in positive impacts.

- **Quality of Leadership and Supervision** – Leaders are credible and influential. Leaders need to be perceived as caring about their people's success, seeking to understand each person's strengths, and providing employees with every opportunity to use those strengths. Great managers empower their employees by creating and sustaining a trusting working partnership.
- **Performance Management** - An effective performance management/appraisal system is being utilized. The process of setting goals, providing meaningful and timely feedback, and holding employees accountable is essential. There's no substitute for a well-designed and well executed performance management process.
- **Opportunities for Growth** – Employees are encouraged to grow, learn, and pursue their potential.
- **Work Processes** – Modern work processes are symbolic of a mindset of people who choose to not be satisfied with the status quo. Discarding antiquated work processes are proactively pursued absence a crisis.
- **Employee Wellness** – Employees feel like the organization cares about them – financially, emotionally, mentally, and physically and applies resources to demonstrate such commitment.

*These ten dimensions, which we have developed and incorporated into a proprietary survey instrument, serve as the framework of our assessment methodology.*

#### 4. Project Work Plan

The Project has four Steps:



## **Step 1 – Initiate Project**

A meeting will be held with the City Manager to finalize the scope of services and project schedule. A Project Kick-Off/Launch meeting also will be held with members of the executive leadership team to gain an understanding of the recent history of the organization, its mission and values, its competency and capability to be a high performing organization, the policies and procedures contributing to or detracting from those objectives, and a discussion of the policies, procedures, practices, goals, objectives and culture of the Departments and their contributions to or distractions from the organization and its goals. This will also provide an opportunity to clarify the scope of the project, respond to questions and manage expectations and discuss their role as mission-critical to the project's success.

## **Step 2 – Collect Information**

The purpose of the Information Collection Phase is to gather all the information needed including:

- **Review of Key Reports and Documents:** Provides a baseline understanding and relatively objective view of operations and current culture. Records and documents that will be obtained and evaluated may include:
  1. Budgets
  2. Collective Bargaining Agreements
  3. Performance Appraisal (blank)
  4. Performance measures
  5. Personnel Handbook/Manual
  6. Strategic Plan
  7. Training plan
  8. Vision/Mission/Values/Goals/Objectives
  9. Others To Be Determined

## **Surveys and Assessments**

An operating principle essential to a successful culture assessment is the active involvement of as many interested employees as possible. Operating under the “no one washes a rental car” mindset, the purpose is to involve employees early and often throughout the assessment phase and implementation.

- **Administer e-Survey/Questionnaire** – A 50 question survey instrument will be sent directly to each employee's email via Survey Monkey requesting completion. The instrument will include five questions for each of the **ten dimensions** of workplace culture (please refer to pages 9 and 10 of this proposal). Examples of questions include:



- **Mission, Vision and Values**
  1. To what extent is the mission well understood by employees?
  2. Employees here always keep going when the going “gets tough.”
- **Employees’ Experience**
  1. Senior management and employees trust each other.
  2. My job gives me the opportunity to experience a real sense of accomplishment.
- **Change and Innovation**
  1. To what extent do you feel free to suggest changes that would help you to perform your work more effectively?
  2. To what extent are employees encouraged to challenge the ways things are done in this organization?
- **Performance Management**
  1. To what extent did your most recent performance appraisal provide you with an opportunity to have a meaningful discussion with your supervisor about your job?
  2. My supervisor and I have a good working relationship.

A 4-point Likert scale will be utilized for the questionnaire and responses will be anonymous (i.e. no names) although respondents will be asked whether or not, whether he/she is a supervisor/manager and in what department they are assigned. There are numerous workplace cultures within the organization and in an attempt to differentiate among departments, the question about which department an employee is assigned is critical when analyzing responses to the questionnaire.

### **Stakeholder Engagement**

- **Interviews:** One-on-one interviews will be conducted with the City Manager and department directors and members of their respective management teams. The intent of these meetings is to gain an understanding of strengths and opportunities for improvement regarding the existing workplace culture and employee morale.
- **Group Interview/Focus Groups:** While a questionnaire provides breadth, focus groups with department employees will provide depth. Intent is to examine more deeply the themes which emerged from questionnaire/survey results. Constructive feedback from these stakeholders is essential to this project’s success and the ability of the organization to implement and sustain changes.



### **Step 3 – Analyze Information Gathered and Prepare Final Report including Recommendations.**

Unfortunately, employees are unaware of their culture until it is challenged, until they experience the new culture, or until it is made overt or explicit through, for example, a framework or a model. While many cultures exist within the organization, the intent of this project is to identify and assess the prevailing culture within the workplace.

Once the results from the interviews, focus groups, survey/questionnaire and review of the reports/documents have been analyzed, **a description or profile of the prevailing workplace culture will be prepared and captured in a written report.** If desired, the description of each department's prevailing workplace culture can be provided for consideration. Based on our experience and expertise, the current workplace culture and recommendations will include techniques and methods that are consistent with the next practices in building and maintaining healthy organizational cultures. This profile/report will be shared with the City Manager.

**The report will include a Blueprint/Project Plan that features a series of *prioritized recommendations designed to strengthen the workplace culture, along with suggested sequence and schedule.*** The recommendations *may* focus on actions for individuals, a department, and the entire organization and in such areas as:

1. Collaborating with executives on targeted steps to embed the desired/preferred workplace culture.
2. Modernizing Talent Management practices related to attracting (i.e., recruiting) and developing employees that are consistent with the preferred culture.
3. Creating a retention strategy to mitigate the departure of high performers.
4. Adopting a systematic and effective Onboarding process to reduce early attrition and accelerate the performance of new employees.
5. Facilitating group development sessions with employees at various levels to (re)affirm mission, vision, values, and healthy workplace relationships.
6. Enhancing the capabilities and therefore, the performance of the members of the workforce by recommending suggested training and development activities.
7. Reimagine employee recognition efforts, both formal and informal means to celebrate their contribution.
8. Adjusting the existing Performance Appraisal process to ensure consistency with the core competencies and values.
9. Creating and implementing Mentoring Program(s).
10. Providing performance coaching.
11. Identifying work processes that are considered cumbersome and adversely impacting employee performance and the delivery of efficient public services and programs.

As per the RFP, presentations to the City Commission, Executive Team, and city employees will be provided as requested.

#### **Step 4 – Implement Recommendations**

A strong culture is an advantage for customer-facing organizations like the City of Mount Pleasant. Creating and maintaining a healthy workplace culture is painstaking work. It requires diligence, focus and commitment throughout an organization. Healthy cultures lift people up, expand the capacity of the workforce to execute new challenges, and, overall, enhance the organization's performance.

It is critical that culture change must not be perceived by employees as another in a series of fads, "management by best seller" as in a "flavor of the month." Often employees are skeptical of these "just add water" fixes to the workplace. Failed attempts to change, unfortunately, often produce cynicism, frustration, loss of trust, and deterioration in morale among organization members. Employees must also understand that culture change is not only essential for the organization to adapt to new realities, but also that it will help them, and their fellow employees perform their roles better and derive greater job satisfaction.

Indeed, many efforts to improve organizational performance fail because the fundamental culture – values, ways of thinking, managerial styles, approaches to problem-solving – remains the same. Even when procedures and strategies are altered, organizations quickly return to the "we've always done it that way" status quo. All too often, leaders mistakenly believe the merit of the recommendations will be sufficient to implement change. It has been my experience that the merit of an idea has little to do with successfully implementing change.

Attempts to shape a culture require activating a vision of what is preferred and being relentless in pursuing that vision. The goal is a culture that is constantly evolving, with leaders learning from shifting circumstances and employees who don't merely buy in but instead "join in." They are poised and nimble, they embrace uncertainty and opportunities, and they recognize that change is not an event but a process.

**We blend our in-depth expertise about culture change along with extensive experience to transition, sometimes transforming, the workplace culture from the prevailing to the preferred. Partnering with municipalities from across the country, our role has been, and we are recommending a similar role for this endeavor, to partner with the City Manager and members of his team to operationalize the recommendations we offer. Typically, it's a hybrid model of consulting key leaders behind the scenes along with being present to facilitate employee groups toward a mission, vision, values and the like. We will customize our role based on the City's needs and preferences.**

Culture change is not a project per se, but a dynamic, continuous process; so, your work to support culture change will be on going. Helping your organization surf the waters of change is not a sport reserved for vacations — it's a way of life for leaders who choose to succeed by choice and not by chance.

## 5. The Workplace Culture as a Driver to Performance

Increasingly, leaders of modern organizations are adopting a “High Commitment Culture” framework as their preferred workplace culture. The following table lists the comparison of Traditional Culture with that of a High Commitment version.

Characteristics of Traditional vs. High Commitment Culture	
Traditional	High Commitment
There is a rule for everything. It is easy to manage by rules but ineffective.	Principles are established and they guide most decision making.
Conservative goals are set based on past limitations.	Stretch goals are inspired by future possibilities.
Responsibility is given, but authority is withheld, or authority is requested without taking responsibility.	There is a balance of responsibility for results and authority to influence decisions that affect them.
Systems and policies are designed for the 5 percent who don't do the right thing.	Guidelines are established for the 95 percent who want to do the right thing.
Disagreements are frowned upon, and those in positions of power win arguments.	Differences of opinion are celebrated and capitalized on to formulate better decisions.
The assumption is that people want to get away with doing as little as they can.	The assumption is that people want to contribute, learn, and grow.
There are hard and fast boundaries around jobs; people have limited skills.	Team members are multiskilled and flow to the work as needed.
Employees often have to choose between doing what's right for them and what's right for the organization.	Employees' and the organization's interests are inseparable. Common objectives benefit the organization and individuals within it.

For people to think differently and act differently, you have to create a common vision of what the City of Mount Pleasant Workplace Culture is all about and how their work fits in. This doesn't mean you need to create catchy slogans to put on T-shirts, hats, and coffee mugs; those are surface changes. You change behavior over time by continuing to talk about the vision and by bringing it into everyday life. You need to describe the organization as it will be and show individual employees what they must do to realize their vision.

## B. PROPOSED TIMELINE AND COST/FEE

The following schedule is a proposal for consideration. Based on additional input by the City, customization will ensue. The Mejorando Group has the resources to begin this project in March. We have provided a proposed project schedule that results in a report by June 30, assuming that all necessary information is made available to the Mejorando Group in a timely manner and that city employees are available for meetings as needed by the schedule. We pride ourselves on our responsiveness to clients, and our proven track record in the ability to complete our projects on schedule and within budget and quality assurance/quality control.

Date	Activity
March/April	1. Initiate Project – finalize Scope of Services and Schedule.
April/May	2. Collect Information – Administer questionnaire, conduct interviews and focus groups and prepare a summary of input gathered.
June	3. Analyze Information Gathered and Prepare Report including Recommendations. Report to be submitted by June 30.
July/August	4. Implement Recommendations

**Total Fee is not to exceed \$49,100 for the Assessment.**

- Hourly fee/rate is \$390.
- 90 hours to complete the assessment and provide a final report. Fee is \$35,100.
- Facilitate up to fifteen employee focus groups. The assumption is that small departments might be merged with other small departments. Total of \$14,000.

Travel reimbursement is in addition to the Cost/Fee.

## C. REPRESENTATIVE EXPERIENCE

Customer/client name	<a href="#">City of Manteca, California (pop. 85,878)</a>
Customer Organization Size	400 employees
Reference name	Toni Lundgren, City Manager
Phone number	209-465-8627
Email Address	tlundgren@ci.manteca.ca.us
Service Description	In 2021, completed an assessment of organizational culture. Currently implementing various recommendations to strengthen workplace culture including: 1) Facilitating sessions with groups of employees who are informal leaders. We refer to this group as “Common Threads” who serve as the oversight group responsible for shifting the culture; 2) Facilitating group development sessions with executive leadership and newly appointed city manager; 3) Training group (not yet scheduled) of select employees to facilitate sessions with department employees to create a mission, vision and set of values; 4) Presenting a range of management training workshops for a variety of employees (note yet scheduled). Currently in discussions about our role going forward.
Customer/client name	<a href="#">City of Reno, Nevada (pop. 250,998)</a>
Customer Organization Size	1,500 employees
Reference name	Sabra Newby , City Manager (former)
Service Description	In 2019, completed an assessment of organizational culture. Provided a series of recommendations to strengthen the “Reno Way” and as implementation started, turnover occurred among many key executives.
Customer/client name	<a href="#">City of Sunnyvale, California (pop. 153,656)</a>
Customer Organization Size	600 employees
Reference name	Kent Steffens, City Manager
Phone number	408-730-7480
Email Address	KSteffens@sunnyvale.ca.gov
Service Description	In 2019, evaluated the “Sunnyvale Way” workplace culture and provided a series of integrated solutions centered on fortifying the culture, enhancing the quality of leadership, and modernizing talent management practices including employee experience and engagement. City Manager established a group of employees to oversee implementation which continues through today.

Culture is typically a segment of other services we provide including facilitating Strategic Planning, evaluating department performance, completing staffing studies and even presenting training workshops. As a result, we regularly contribute our expertise and experience to strengthen the respective workplace culture albeit within the context of those engagements. To review our entire list of clients, please click [here](#).

## D. FIRM QUALIFICATIONS

Based in Cumberland, Maine and 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 services 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 to clients who are seeking new ways to improve constantly.**

We have earned a national reputation by delivering quality work products to our clients, helping them accelerate high performance. We feature a proven record of partnering with organizations through the myriads 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.

The Mejorando Group is comprised of professionals that have served as executives and managers in organizations from both the public and private sectors and together have several years of experience working in all aspects of local government management. As a result, we bring you extensive experience, breadth of expertise, strong people management skills, seasoned judgment and a valuable perspective that provides for an

Our full range of services includes the following:

- **Culture Change** - We partner with leaders to help transition, sometimes transform, their workplace culture by resetting expectation, refreshing various internal policies and practices, and revising organizational values all serving as drivers of high performance.
- **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 changes.

- **Strategic Planning Services** – Our approach to facilitation, from group development to strategic planning, enables a group to focus on future 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).
- **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** - 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.
- **Organizational Analysis and Process Improvement** – We review and analyze various functional areas within an organization 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.

Visit our [website](#) which provides general information on our firm, the services we provide, list of clients, and resources such as articles we have published.



## E. 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., Succession Planning), and Organizational Effectiveness services. As a Consultant and Manager in both public and private sector organizations, ***including as a city manager***, Mr. Ibarra brings organizations over 39 years of experience and a shared understanding of the particular demands and constraints placed on government organizations and their employees.

Patrick has designed and facilitated scores of customized organization effectiveness efforts specifically for local governments designed to transition 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 solutions (culture change, strategic planning and execution, training, teambuilding/group development, etc.).

#### **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 Facilitator, Development Dimensions International

#### **Publications** (recent)

- Design Thinking and the Consumer Experience – August 2024 issues of Public Management published by ICMA.
- Comprehensive Guide to Succession Planning: The Time is Right Now! – January 2024 issue of Public Management published by ICMA



- “Break Glass: 10 Emergency Ways to Combat the Hiring Crisis” – February 2023 issue of Public Management published by ICMA.
- “Help Wanted Part Two: The Rapidly Changing Role of Human Resources” – August 2022 issue of Public Management published by ICMA.
- “Help Wanted Part One: Turning Your Workplace into a Talent Magnet” – June 2022 issue of Public Management by ICMA
- **“A Healthy Workplace Culture is the “Secret Sauce” for Success, Part 2” – September 2021 issue of Public Management by ICMA**
- **“A Healthy Workplace Culture is the “Secret Sauce” for Success, Part 1” – August 2021 issue of Public Management by ICMA**
- “Don’t Get Ready, Get Started – Your Innovation Fitness Plan” – April 2021 issue of Public Management by ICMA
- “We’ve Always Done It That Way Is Over: Part Four – Innovating Your Future” December 2020 issue of Public Management by ICMA
- “We’ve Always Done It That Way Is Over: Part Three – Reimagining Your Community” August 2020 issue of Public Management by ICMA
- “We’ve Always Done It That Way Is Over: Part Two - Building a Talent Centric Workforce” May 2020 issue of Public Management by ICMA
- “We’ve Always Done It That Way Is Over: Part One - What’s Next; Leading Change is a Process, not an Event” February 2020 issue of Public Management by ICMA

### **Conference Presentations - 2025**

- Illinois City/County Management Association
- International City/County Management Association
- Maine Town and City Managers Association
- Montgomery County (PA) Consortium of Local Governments
- Wisconsin City/County Management Association



mejorando group

## REPORT

May 24, 2021



# *Culture Assessment*

Submitted By:

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925-518-0187

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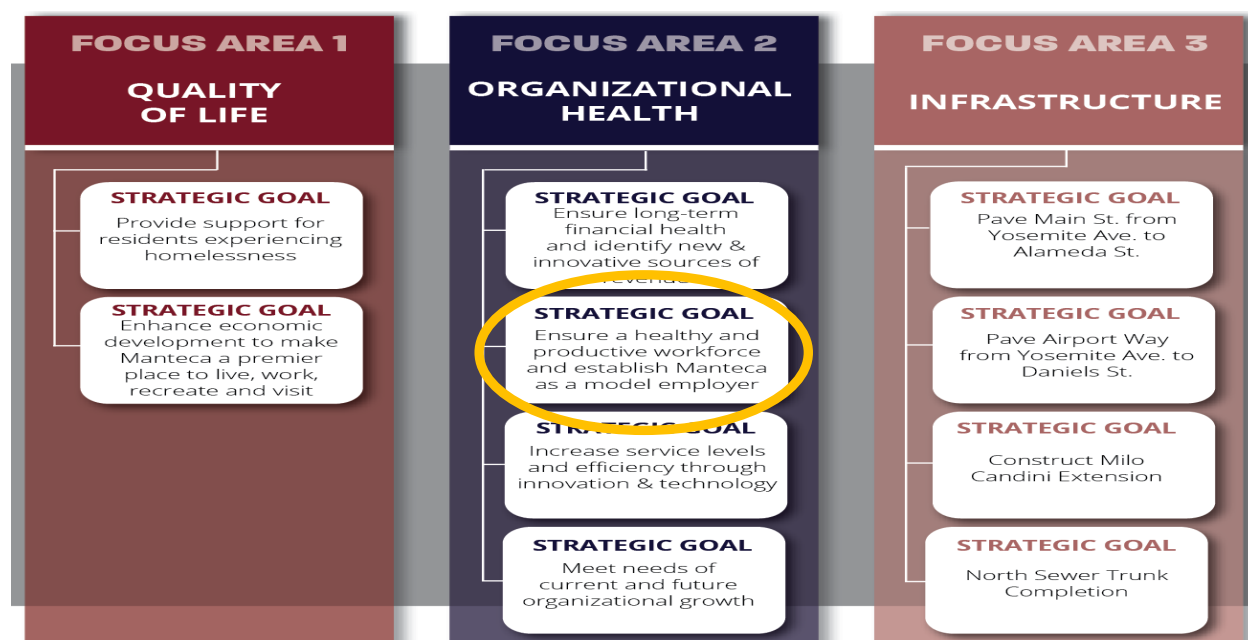
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## EXECUTIVE SUMMARY

Culture is the underlying fabric that holds an organization together. When the fabric is strong, groups can endure major challenges and thrive during better times. If the fabric is tattered, groups may manage to get by, but employees, projects and customers fall through the gaps. In cases where the cultural fabric is falling apart, groups and organizations become so dysfunctional that they are a detriment to the health and well-being of employees.

While a healthy workplace culture does not guarantee high performance, it's almost impossible to achieve without it. Successful organizations are purpose-driven, principle-led, performance focused, values based and feature a healthy workplace culture. High performing organizations are those with high levels of trust, effective leadership, and collaboration. There is an interrelationship between trust and collaboration that creates a virtuous cycle. Collaboration is based on trusting others and sharing with them, and by sharing with others you create trust.

As a result of a variety of circumstance the City of Manteca is experiencing significant change and consequently, leaders are interested in pursuing specific recommendations intended to fortify your workplace culture and employee morale as a driver of successful organizational performance. In that regard, leaders at the City of Manteca have, under the Focus Area of Organizational Health, set forth the pursuit of being a model employer.



Most people want to be part of something bigger than themselves—this is why culture is the most important dimension of an organization's identity. It's the context— or should be—for every other dimension. Indeed, every City of Manteca employee has a role as a community builder.

A brief overview of organizational culture – “culture is the underlying assumptions, beliefs, attitudes, and expectations shared by an organization.” Culture defines acceptable and appropriate behaviors in an organization and affects the motivation of the workforce. As such, it is a management resource that can be used to meet organizational objectives, just like knowledge, equipment, technology, dollars, and human resources. In a high-performing culture, those processes maximize total motivation.

Creating a healthy workplace culture in the public sector poses unique challenges. In contrast to the business world, governmental organizations have constantly evolving priorities, excessive bureaucracy, shifting political winds as elected leaders come and go, ebbing and flowing budgetary resources, and, too often, a lack of understanding by leaders and managers of culture's power and influence.

The attitude toward culture has started to evolve. Forward looking leaders are no longer passive on this issue and are more focused on understanding the culture of their organizations. By understanding organizational culture, its symbols and hidden meanings, its values, and its underlying assumptions, organizations can change culture and, in so doing, change the behavior and ultimately the performance of individual employees.

Everyone at the City of Manteca is a volunteer – and they can choose to volunteer their time and energy anywhere. A culture of trust engages volunteer-employees in the organization's goals and transcendent purpose: how the organization helps create a better quality of life for Manteca residents. Leaders who understand this will realize the high return on a culture of trust.

Employee morale describes the overall outlook, attitude, satisfaction, and confidence that employees feel at work. When employees are positive about their work environment and believe that they can meet their most important needs at work, employee morale is positive or high. If employees are negative about their workplace and feel unappreciated and cannot satisfy their goals and needs, employee morale is negative or low. The morale of the City's workforce has a direct link to the performance of each department and the entire organization. When morale declines and performance suffer, the consequence can be a less credible government which can hinder the building of a stronger community.

City leaders are understandably concerned that due to the result of the convergence of various forces impacting the existing workplace culture that the methods by which the

city has achieved its current level of performance may be adversely impacted and thus, this assessment was commissioned. These forces include, but are not limited to:

- ❖ Velocity of change that will continue and possibly accelerate. Factors include political uncertainty and substantial employee turnover that is 50% since 2016.
- ❖ The shifting workforce demographics .
- ❖ The evolving role of government, specifically the service portfolio of various city departments.
- ❖ The impacts from COVID-19 on employee morale and performance.

It is clear from the pandemic crisis that the leaders who create the most value and respect for their organizations are those who navigate and rally the stakeholders, in particular instilling confidence and provide a path forward for employees. Their leadership permeates the workplace, and their purpose is manifested in their actions and behaviors. Their commitment goes beyond just their employees or the city's impact; they understand that at both good times and – in particular – during crises, a healthy workplace culture is mission-critical.

Successful leaders seek to fortify the workplace culture so as to:

1. Remain adaptive in a rapidly changing environment.
2. Enhance the employee experience.
3. Conserve those elements of the culture, the “roots”, that are a source of strength and pride.
4. Establish a strong foundation of self-awareness, self-reliance, and a growth mindset of always moving forward.
5. Manage the evolution of the organization realistically.

**According to my assessment the current culture reflects a spirited group of employees wanting to perform their best. In some pockets, the work environment is warm, collaborative, and welcoming places where people help and support one another. On the other hand, challenges and barriers also exist within the current workplace culture about trust, relationships, opportunities to learn and grow, antiquated promotional processes, and the city's approach to attracting, retaining, and developing the workforce. Many comments were reflective of strong emotional feelings ranging to the extremes – “I love my job and the people on my team” to “Lots of fear in my workplace and I dread going to work every day.”**

Unhealthy cultures drain employees and affect their motivation and contribution. Culture should be replenishing employees' energy, not draining it. What's holding the organization back isn't just outside your doors, but inside your walls: the way your people feel, think, behave, and relate to one another. In other words, the way they work together.

Conventional wisdom in government has been that the key to improving organizational effectiveness is the result of adding more resources – people/employees, equipment, and technology – but that's been proven time and time again not to be accurate. One of the most effective means by which to achieve a higher level of organizational performance is to create and sustain a healthy workplace culture where people can excel and pursue their potential. The role of culture is similar to oil in an engine – it's what makes everything else work more smoothly, efficiently, and powerfully.

If you really want to change your culture, you'll need a high level of empathy, great persistence and resolve, rigorous focus, and a practical methodology that brings out the best in your current cultural situation.

The **recommendations** are not intended to fix the culture per se, but instead leverage its current strengths and renovate it where needed. The outcome is a refreshed workplace culture and modern employee experience where workforce members are united by a common purpose and leaders emphasize teamwork, and positive relationships. In particular, the recommendations focus on establishing a "Connection Culture" that incorporates three critical dimensions - Vision, Voice and Value. The steps necessary to achieve the Connection Culture include:

- ☑ The Interim City Manager serving as a visible and vocal advocate supporting the culture reset process.
- ☑ Assembling a select group of employees that will be referred to as "Common Threads" and who will serve as the champions of change. Members will participate in a series of training workshops focused on the Connection Culture and their unique role in helping it being realized. In addition, members will participate in training to become facilitators and be distributed throughout the organization to assist departments reset their vision and values.
- ☑ Members of the Executive Leadership Team (ELT) convening for several sessions focused on establishing a purpose for the organization along with other dimensions supporting the Connection Culture.
- ☑ Refreshing the role of leaders-managers-supervisors in the organization.
- ☑ Providing a range of leadership-management-supervisory training workshops.
- ☑ Reminding members of the governing body their special role as supporters for the culture refresh.
- ☑ Renovating a number of talent management practices including the hiring and promotional processes.

The best method for creating a readiness to change is to sensitize employees about the pressures for change. Expectations can serve as a self-fulfilling prophecy, leading workforce members to invest energy in the change initiatives they believe will succeed. When employees expect success, they are likely to develop greater commitment to the change process and to direct more time and effort into the constructive behaviors needed to implement it. The key to achieving these positive effects is to communicate realistic, positive expectations about the organizational changes. Information about why the change is occurring, how it will benefit their respective job/role and the entire organization, and how employees will be involved in the design and implementation is most helpful.

When a leader communicates the organization's purpose with authenticity and constancy, employees recognize their commitment, begin to believe in the purpose themselves, and reorient. The change is signaled from the top, and then it unfolds at all levels. Leaders need to inspire optimism, creativity, shared commitment, and growth through good times and bad to create an environment where everyone can do their best work and build organizations and teams that are stronger tomorrow than today.

Today's unpredictable environment requires a resilient climate of ongoing improvement. To that end, organizations must treat change as an ongoing process, not an event with a start and end date.



## A. BACKGROUND AND UNDERSTANDING

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

Many government organizations are experiencing significant and enormous challenges: new and expanded service levels, changing business processes, shifting workforce demographics, increased public scrutiny, explosion of technology and the list seems to expand with each passing day. During these times of unprecedented and disruptive change, leaders at all levels of government must improve their ability to manage a perplexing puzzle – how to stay focused on today's business while building tomorrow's. This is the “new normal” which allows leaders the opportunity to hit the organization's reset button. They use the instability of the present to build on and create organizations that are capable of continuous self-renewal in the absence of a crisis. In the process, they can change key rules of the game, reshape parts of the organization, and redefine the work people do.

The very process of change invites a period of instability during which people may fear loss of control and that fear may keep them committed to whatever cultural assumptions they have, even if another set of assumptions might be more desirable from an objective point of view.

The culture that connects City employees to each other and to the organization don't just happen by accident. You must design them with great intent and purpose. And just as important is the authenticity of employees' behaviors. People know when culture is genuine. They see it in what those around them—especially their supervisors, managers, and other leaders—are doing daily. When it isn't genuine, they'll look elsewhere for a new place to work.

While a healthy workplace culture does not guarantee high performance, it's almost impossible to achieve without it. High performing organizations are those with high levels of trust, effective leadership, and collaboration. There is an interrelationship between trust and collaboration that creates a virtuous cycle. Collaboration is based on trusting others and sharing with them, and by sharing with others you create trust.

Before attempting any kind of culture change initiative, the organization's executives wanted to: know what the culture is (i.e., prevailing) and how it works, identify what type (i.e., preferred) of culture would best support organizational strategy, recognize, and use the levers that influence culture.

To assist in addressing this challenging environment, the city requested the assistance of the Mejorando Group to work with it in performing a workplace culture assessment and offer a path forward from the prevailing culture to the preferred. The purpose of this

assessment is to provide leaders with recommendations to strengthen the workplace culture as the basis necessary for improving organizational effectiveness.

## B. PROJECT APPROACH

Culture matters. It matters at work as much as in the community. The science shows that employees want to be trusted and to be held accountable to one another because it makes work challenging and enjoyable and has a direct impact on the organization's level of performance.

The good thing about culture is that it provides coherence and continuity. The bad thing about culture is that can anchor an organization in past practices that no longer fit a changing world.

This Workplace Culture Assessment provides a means of assessing the perceptions of the city's employees and managers on the work environment and proactively addresses issues of concern in the workplace.

There are many benefits to conducting this Workplace Culture Assessment:

- City employees feel they have been listened to and they have input as to how concerns will be addressed.
- Provides timely, relevant information and insight into dynamics of workplace culture for leaders and managers to consider in planning, organizing and decision-making processes.
- Improves overall morale by demonstrating, in a tangible manner, management's commitment to engage in meaningful discussions with employees and to address and resolve tough issues.
- Provides a baseline of existing workplace culture practices along with an integrated range of solutions designed to address each (practice) individually and the entire set collectively.

The intent for this project was to identify and assess the prevailing culture and provide a series of synchronized recommendations to help transition or transform it to the preferred culture.

The following important assumptions support the approach used for this project:

1. Culture is a set of shared assumptions; hence obtaining the data in a group setting was appropriate and valid.

2. Employees are capable of understanding and making explicit the tacit assumptions that make up the culture, but they need external help in this process. The Mejorando Group played the role of helper in extracting those tacit assumptions translating those into what are referred to as Current Practices. These are captured beginning on page 23.
3. Some cultural assumptions will be perceived as helping the organization to achieve its strategic goals or resolving its existing issues, while others will be perceived as constraints; thus, it is important for the employees to have a process that allows them to sort cultural assumptions into these categories. Various questions were asked via the questionnaire and during the group interviews about favorable and unfavorable aspects of the workplace culture.
4. Changes in organizational practices to solve the issues that initiated the cultural analysis can often be achieved by building on existing assumptions. That is, the culture deciphering process often reveals – and that was proven in this situation – that new practices can be derived from the existing culture.

Organizational culture is largely driven by leadership, but it also includes a wide variety of other factors, from organizational values and norms to typical behaviors of employees. The following diagram includes the **Ten Dimensions (TD)** of a workplace culture:



- **Mission, Vision and Values** – Employees understand the organization’s mission and vision and their particular role in their execution. When values are shared among employees, it can unleash their potential. When employees know the

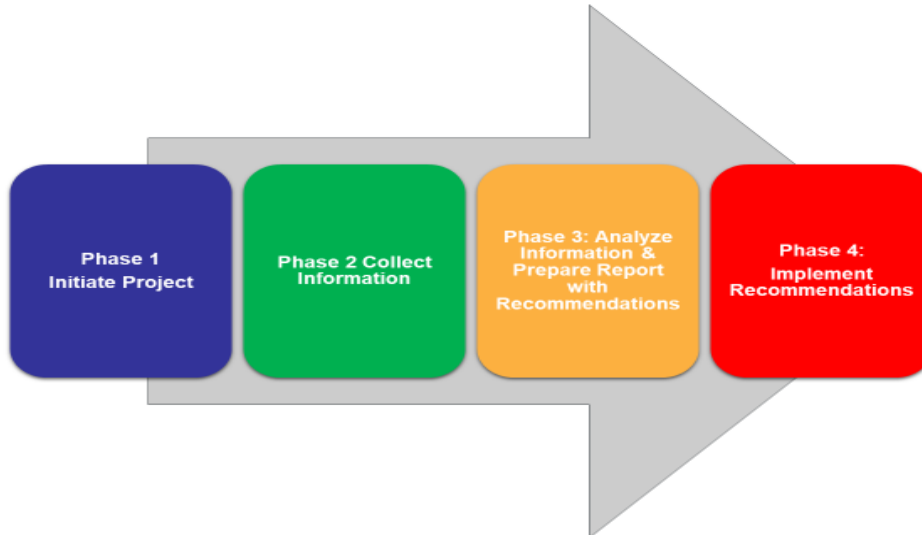
context and overarching purpose of their work, they tend to approach it with a clearer sense of purpose and meaning.

- **Employees' Experience** – Employees feel their input is valued and flexibility is expected as it concerns work-life balance.
- **Teamwork** – Healthy group dynamics are the norm. Employees build and sustain healthy work relationships with peers, direct reports/subordinates, and supervisor/manager.
- **Hiring and Promoting for Fit** – A strong emphasis is placed on hiring, and promoting, for “fit” which includes being supportive of the culture and criteria that goes beyond credentials/pedigree and years of experience. High-performing employees want to work in a performance-based promotional workplace.
- **Change and Innovation** – Change and innovation are discussed frequently among employees and pursuing improvements to current operations, services and programs is supported. Change management is not an event, but instead is a process that is inclusive and collaborative.
- **Quality of Leadership and Supervision** – Leaders are credible and influential. Leaders need to be perceived as caring about their people's success, seeking to understand each person's strengths, and providing employees with every opportunity to use those strengths. Great managers empower their employees by creating and sustaining a trusting working partnership.
- **Performance Management** - An effective performance management/appraisal system is being utilized. The process for setting goals, providing meaningful and timely feedback, and holding employees accountable is essential. There's no substitute for a well-designed and well executed performance management process.
- **Opportunities for Growth** – Employees are encouraged to grow, learn, and pursue their potential.
- **Work Processes** – Modern work processes are symbolic of a mindset of people who choose to not be satisfied with the status quo. Discarding antiquated work processes are proactively pursued absence a crisis.
- **Employee Wellness** – Employees feel like the organization cares about them – financially, emotionally, mentally, and physically and applies resources to demonstrate such commitment.

These ten dimensions served as the framework of the assessment methodology.

## C. PROJECT WORK PLAN

The Project has four phases:



### Phase 1 – Initiate Project

This task formed the basis of the partnership between the Mejorando Group and the city. The Mejorando Group began with an initial meeting with the Leadership Team along with a kick-off meeting to ensure a clear understanding of the objectives for the project were established at the inception.

### Phase 2 – Collect Information

The purpose of the Information Collection Phase was to gather all the information needed including:

- **Review of Key Reports and Documents:** Provided a baseline understanding and relatively objective view of city operations. Records and documents that were obtained and evaluated include:
  1. Budgets
  2. Employee Training – workshops attended
  3. Organizational charts
  4. Performance Appraisal form (blank) and policy
  5. Turnover Report

- Interviews: Interviews were conducted with members of management to gain an understanding of strengths and opportunities for improvement about workplace culture. Department directors were encouraged to include members of their respective management teams in these interviews. This included the following:
  - 1) Lisa Blackmon, City Manager
  - 2) Toni Lundgren, Deputy City Manager
  - 3) Pennie Arounsack-Marques, Director of Information Technology, and Innovation
  - 4) Stephanie Beauchaine, Interim Finance Director
  - 5) Cass Candini-Tilton, Legislative Services Director/City Clerk
  - 6) Chris Erias, Development Services Director
  - 7) Mike Harden, Interim Police Chief
  - 8) Panos Kokkas, Director of Public Works
  - 9) Dave Marques, Fire Chief
  - 10) Aaron Slater, Employee Services and Engagement Director
  - 11) Leigh Ann Sutton, Director of Engineering
- Administered e-Survey/Questionnaire – A 50 question survey instrument was administered capturing feedback from city employees for each of the TDs (Ten Dimensions) listed on pages 10 and 11 of this report. The response rate was extremely high at 199/405, or 49 percent of the entire workforce.
- Facilitate Focus Group Discovery sessions: Six group discovery sessions with a range of employees occurred with approximately 65 employees attending. There are limitations with the approach used, in that particular aspects of department cultures are difficult to identify because of the composition of the groups. However, the benefit of grouping employees together is to gain insight into the overall organizational culture, which is the primary focus of this study. There are aspects to the overall culture that influence the various sub-cultures that exist at department and other levels throughout the organization.

Themes which emerged during Phase 2, along with an analysis of those themes are presented in the following section, Phase 3.

### **Phase 3. Analyze the Information Collected – Current Practices**

Before embarking on a culture renovation, an organization's workforce needs to first understand how the current culture is perceived. According to recent research, two-thirds of organizations that successfully changed their culture reported that they first gathered input and related data from the workforce to understand how employees viewed the existing culture and ascertain what they'd like the renovated culture to be.

Listening to the workforce can help uncover attitudes and issues percolating under the surface.

When I work with organizations to establish their baseline culture, this process always involves working through strong feelings that people have about their employer, about how it supports them and when it feels like it stands in their way. Getting to a clear-eyed assessment of the prevailing culture means working through a lot of emotional nuance. Then, when it's presented back to the workforce, another kind of emotional response occurs: the satisfying sense of recognition of commonality and the pleasure of being seen and understood.

Employees draw emotional energy from the organization's values and culture. It's impossible to create a workplace culture where everyone is happy in the sense of being joyous and brimming with positivity. That's just not human nature. However, employees should be committed to supporting the goals and values of the organization and supplying their team with the resources and support needed to get the job done. In this instance, the organization has a significant number of employees from across departments who are committed to bringing their best contributions every day and are proud of the organization's legacy of success and being poised to maintain this, if not exceed it, going forward.

In this situation, many Manteca employees are concerned the current workplace culture is unraveling and has created an unhealthy work environment. The City has encountered several situations that have adversely impacted the workplace culture. These include:

- ❖ The level of turnover among executive positions which has created a certain level of emotional fatigue among employees.
- ❖ Comments from elected officials directed at city staff resulting in feelings of being unappreciated.
- ❖ Inconsistent and sometimes, inaccurate, communication from leaders and managers to employees. Consequence is a trust-deficit and credibility-gap exists.
- ❖ Unclear and at times, perception of unfair, promotional processes.
- ❖ Inadequate training for those employees interested in growing their capabilities.
- ❖ A performance appraisal process that lacks credibility.

While there appear to be many employees who enjoy their immediate co-workers and the team with who they're working, the impacts from recent events have generated a feeling among employees of declining morale which undermines organizational effectiveness. Employees want to feel as though the best days for their career/job, much like the city organization, are in front of them.

In regard to the **e-questionnaire** that was administered, 199 of the 405 employees who received a survey, responded which is an excellent rate of responses. Of the 199

employees who responded, 164 identified as non-management whereas 35 identified as a supervisor/manager. The rating scale used was 1 to 4, with 1 being the lowest/worst and 4 being the highest/best. The average score for the five questions per each of the dimensions is included in parentheses.

- Positive dimensions listed below are those questions which were scored at 50% or above for Agree or Strongly Agree.
  - Teamwork (3.23) –
    - Employees feel they are a member of a well-functioning team.
    - Teamwork is encouraged.
  - Quality of leadership and supervision (3.04) –
    - My manager does a good job of sharing information.
    - Supervisor and I have a good working relationship.
    - I am confident in the organization's leadership team to make the right decisions to manage through crisis.
    - and confidence in leadership team to make the right decision to manage through crisis.
  - Change and Innovation (2.92) -
    - Employees are encouraged to challenge the ways things are done in the organization.
    - How quickly does your team adjust to changing priorities?
  - Mission, Vision and Values (2.89) -
    - I understand how my work directly contributes to the overall success of the organization.
    - I am familiar with, and understand, the organization's strategic goals.
  - Employee Wellness (2.84) –
    - My manager understands the importance of maintaining a healthy balance between work and family.
    - The organization has reasonable expectations of employees.
    - The organization provides helpful resources for my physical, mental and emotion healthy.
  - Hiring and Promoting for "Fit" (2.79) –
    - New hires are qualified for the position they fill.
    - New hires have a positive attitude and go the "extra mile."
  - Work Processes (2.78) –
    - The necessary information systems are in place and accessible for me to get my job done.



- The rules and regulations are reasonable in my department.
- I am able to make decisions affecting my work.
- Responses in which  $\frac{1}{4}$  to  $\frac{1}{3}$  were either Disagree or Strongly Disagree are indicators which reflect aspects of the workplace culture that require attention. These include:
  - Employee Experience: (2.71) – the lowest average score for the ten dimensions.
    - How well my skills are being used
    - Senior management and employees trust each other.
  - Hiring and Promoting for “Fit”: (2.79) -
    - Working at the City of Manteca is important to the way that I think of myself as a person.
    - Promotional process is fair and based on performance.
  - Employee Wellness (2.84) –
    - I get excited about going to work.
    - I am satisfied with my workplace culture.
  - Mission, Vision and Values (2.89) –
    - When I speak up at work, my opinion is valued.
    - Upper management has created a vision for this organization that excites me to work to achieve that vision.
  - Change and Innovation: (2.92) -
    - Employees are encouraged to challenges the way things are done in this organization.
    - Employees in my organization willingly accept change.
    - There is an emphasis on innovation even it means taking calculated risk.
  - Quality of Leadership and Supervision (3.04) -
    - How comfortable do you feel sharing new ideas and suggestions with leadership?
  - Performance Management: (3.06) -
    - The performance appraisal process does a good job of measuring job performance.
    - The organization promote people who have the best qualifications.
  - Opportunities for Growth: (3.09) -
    - I am satisfied with my opportunities for professional growth.

- I am satisfied with the investment the City makes in training and education.
  - All employees have an equal opportunity for advancement.
  - I am encouraged to attend training and development programs that increase my skills.
- Work Processes: (3.16)
    - Upper management has been successful in its efforts to eliminate bureaucracy in our organization.
    - My supervisor tries to eliminate unnecessary policies and procedures that get in the way of me doing my job.

Of the 199 employees who completed the questionnaire, 102 submitted comments. These comments, as all responses to the questionnaire, are anonymous.

While a survey/questionnaire provides breadth, discovery sessions with employees provide depth. Consequently, six groups of employees (consisting of approximately 65 employees) were gathered to explore in further detail the results of the e-questionnaire. These sessions were live and held virtually. The following is a summary of the comments which emerged from the questions asked during those sessions. Not all comments are included here as they were blended into themes. Important to remember is that not all of these actions, either positive or not, are occurring in every department each day.

☒ *About 1/3 of respondents aren't very excited about going to work. Describe the organization.*

- Unstable – lots of turnover at the top
- Uncertainty and uneasiness
- People are playing favorites
- Scared to say no – fearful.
- Lots of micro-managing with heavy focus on compliance.
- Command and control type of leadership .
- Dysfunctional family
- Lot of favoritism
- Frozen in time
- We've always done it that way mindset.
- We have tremendous potential and right now, there are lots of good things going on.
- Never seen the City in such disarray. We've lost our way, with people pulling it in different directions.
- Confusing place to work.
- Some people have placed in positions lack experience and their credibility is questionable.
- Big communication gap between Council and those in executive management and throughout the organization.

- Lots of drama and crises.
- We need a higher level of sophistication to support our future growth.
- Lots of stress.
- I love coming to work where most people are working hard and care about one another.
- We have a strong bond among our small work team.
- So many changes implemented so fast it has created fear among employees.
- Unforgiving
- We support each other quite well, but it seems the unfavorable/critical comments by some members of the public are bringing us down.
- We have a lot of really good employees, lots with really good heart and want to be here, but often don't feel appreciated or receive much, if any, praise.
- Some employees hoard their knowledge and aren't particularly helpful to others.

☒ *What is the organization is trying to accomplish?*

- Provide level of service and infrastructure for people.
- Serve our customers
- Trying to stay afloat and meet needs of the community, although staffing levels are not where they should be.
- Feel like we're treading water and occasionally, drowning.
- Not really clear – lots of chaos.
- Goals from political campaigns.
- Lots of missed opportunities and frequent changes in direction.
- Goals and areas of focus don't seem aligned throughout the organization.
- Always seem to be "doing more with less."
- Overall, we're trying to maintain a certain level of services with fewer resources.
- Trying to make our services, more user-friendly, especially for on-line bill paying and other services.
- City leaders appear reluctant to make tough financial decisions that might impact residents. For instance, raising user fees and rates. City's financial condition seems to a major concern.
- No idea. We're flailing in the wind.
- Feel like we're living in a perpetual level of white water. Very stressful.

☒ *44% of responses were either Disagree or Strongly Disagree to the question I am satisfied with my workplace culture. What do you like about the current culture and want to see strengthened?*

- Love going to work.
- Enjoy my job and co-workers

- Let us telecommute and open to creating a permanent telecommuting policy.
- Healthy environment - managers understand employees as people by showing concern and compassion.
- Co-workers are awesome, they care and it's a fun place to work.
- When times get sort of crazy, people join together for a common bond-teamwork is emphasized.
- Our work group is as close as ever been.
- Tough trying to work with people who are working at home. Used to be able to stop in and now not getting answers as fast.
- In my department, we're a family with open communication and able to resolve all types of issues within. I feel upper management at times, interferes with our group that by applying rules micromanaging about things they know nothing about.
- Would like to see consistency by upper management as it concerns implementation of various policies.
- Working from home.
- Work-life balance
- Quarterly meetings with the City Manager, such as those held by Mr. Ogden.

☒ *What about the culture needs to be fixed?*

- Clear communication across all levels. Right now, we hear a lot of conflicting information and it's hard to know what's true and what's not.
- Employees want to feel supported and secure.
- Appreciating the employees.
- Favoritism needs to stop.
- People are afraid to make mistakes, so consequently, people won't take chances.
- Acceptance and understand change.
- Love to get more team building.
- Should hold more Lessons Learned sessions where we can discuss mistakes and what we learned from it.
- Only constant is change and the sooner it's embraced, the better.

☒ *58% of responses were either Disagree or Strongly Disagree to the question of Senior management and employees trust each other. Reasons why that exist.*

- Turnover at the top.
- Inconsistent communication from those in the top.
- Asking questions is discouraged.
- Seems no one in senior management is willing to accept responsibility.
- Last 18 months have been most miserable of my career working for the City, but I still love my job.

- Hear a lot of those in executive management positions “bashing/criticizing” employees.
  - Lack of integrity. Instead, people say one thing, and do another.
  - People not fully realizing what departments are doing and not having full knowledge of everything.
  - Some of the comments offered by elected officials at Council meetings are not supportive of staff, and occasionally critical.
  - Selective hearing by those in senior management positions – hearing only what they choose to.
  - Our expertise isn’t valued very much, and some managers aren’t taking the time to learn about what we do.
  - I feel used instead of utilized.
  - Fear of retaliation.
  - Some employees are stuck in the old way of doing things.
  - Implementing change without a clear understanding of the situation creates instability and mistrust.
  - Unfair hiring and promotional practices that have happened.
  - Unsure about my faith in their judgement.
  - Seems those in management make decisions which benefit themselves and not the entire workforce.
  - Recent decision to award those employees who weren’t Y-rated, a 1% increase. This was not well received by many employees.
  - Seems certain jobs are being reclassified.
  - Some of the current problems and issues go back more than a few years.
- ☑ *52% of respondents were either Disagree or Strongly Disagree to the question Promotion decision are fair based on performance.*
- Based on who you know, not necessarily what you know.
  - We’re told we’re the experts but then we offer an opinion, it’s not valued.
  - Process seems to change frequently.
  - Seniority is valued over performance.
  - Never mentored or had any type of program to earn a certificate.
  - Nothing available for those people who would like to climb and grow.
  - I feel when they go to post a promotion, qualifications are based on what a person has – (i.e., education level, etc.) so they can promote the person they want.
  - No such thing as promotion in our department.
  - We used to have a “stepping up” program that was designed to help employees move ahead, but it went away.
- ☑ *48% of respondents were either Disagree or Strongly Disagree to “the performance appraisal/evaluation process does a good job of measuring job performance.”*

- Told by my previous supervisor they have to submit the appraisal as standard of meet minimum standards to get approval. It didn't appear I could exceed standards, so it was demotivating.
- It would be better if the comments and evaluations were accepted when submitted. What I mean is upper management returns evaluations and demand supervisors to make certain changes. I don't understand how this can happen when upper management is not in that particular department daily so why question the supervisor's evaluation.
- Process is convoluted with too many steps/layers.
- Some questions on the form/instrument are irrelevant to my job.
- Mine is rarely ever completed on time.
- Received training to complete evaluation, but wished they'd offer mentoring on how best to manage employee performance.
- I receive same comments every year on my appraisal.
- Superficial.
- I haven't received an evaluation in over 9 years.
- The weighting of questions seems odd.
- I receive great feedback and together, we co-create goals.
- Performance doesn't matter – whether you're outstanding or not, each employee receives the same score.
- It's too much of a "check the box".

☒ *What are your Recommendations for ways to improve the situation?*

- Create a sense of community – more events with different departments.
- Getting rid of mentality that "it's not my job."
- More praise and positivity.
- Integrity, accountability, empathy, humility, resilience, vision, and positivity are the key characteristics of a respected manager the city needs.
- Impacts of COVID 19 have created quite a bit of stress for some employees.
- Establish trust and communication.
- More frequent communication to all city employees so we feel like we're part of the big picture.
- Define the vision and mission within the organization and our department and ensure leaders, including Mayor and Council, are in line with the vision and mission.
- Provide training and coaching services for those in executive, management, and supervisory roles.
- Skills inventory – lot of talent in the city so get a sense of what people are capable of. Find out and develop training to close the gaps and leverage the capabilities.
- We need to pause, take a step back reconsider the initiatives – what's essential and what's not, and prioritize accordingly.
- Stability among those in senior leadership positions.

- Discussions with employees at all levels about ways to improve and explore our respective roles.
  - Giving our voice the value, it deserves.
  - Holding periodic meetings for those in management and for all employees to discuss issues, items forthcoming, etc.
  - More training for those in management and leadership roles on how best to address this situation.
- ☑ *What's the role of those in management going forward?*
- Take this culture study seriously and implement the recommendations that are provided.
  - Taking responsibility and acknowledging that a lack of communication exists, and that trust is absent.
  - Provide us the tools and environment to do our job well.
  - Communicate more frequently and more consistently.
  - Hold themselves, and others, accountable.
  - Understand the role of those around them.
  - Plan better for the current and future workload.
- ☑ *What's the role of non-managers going forward?*
- Keep an open mind.
  - Being honest, and not sugar coat anything
  - Realizing communication is a two-way street.
  - Being open and honest about things when things aren't going right.
  - Willingness to forgive.

The themes do not apply uniformly across the organization. Perceptions from employees, in all organizations, are not always based on facts, but primarily on their own experience, what they “see” happening, and gossip. Effective leaders understand these forces are always a factor and are vigilant at countering their influence by building and sustaining healthy relationships with employees and fostering a healthy workplace culture where rumor and innuendo are not tolerated. Also, to clarify, offering negative input does not imply the employees who are sharing it are pessimistic or so-called “problem employees” but might be frustrated with the present situation and want it to improve.

People in organizations are influenced by those around them - their attitudes, feelings, behaviors, and perceptions come to echo one another. The patterns of these interactions take on a presence that is greater than the behavior of any single individual. Everything coalesces into an informal but broad-based and well-established sense of what is appropriate and what is not: “how we do things around here.”

It's tempting to dwell on the negative traits of the culture, but any workplace culture is a product of good intentions that evolved in unexpected ways and will have many strengths. They might include a deep commitment to customer service (which could



manifest itself as a reluctance to cut costs) or a predisposition toward innovation (which sometimes leads to “not invented here” syndrome). If we can find ways to demonstrate the relevance of the original values and share stories that illustrate why people believe in them, they can still serve the City well. Acknowledging the existing culture’s assets will also make the change feel less like a top-down imposition and more like a shared evolution.

I sense there are a number of employees who genuinely want the culture to be healthier for themselves and their co-workers. City employees want to be proud to work for the City of Manteca and realize, for a number of reasons, it’s become difficult to feel that way.

**The following are interpretations, or themes, of the input gathered from the interviews conducted of individuals, focus groups, questionnaire results including the comments portion, along with a review of various documents and materials. In short, these are considered Current Practices or the Prevailing Culture:**

- 1) Employees **take great pride in public service**. Several comments were shared about the commitment displayed by a number of employees who choose everyday to build a stronger Manteca community. As is common in organizations, many employees affiliate primarily with their immediate work group/team and overall, are pleased with the camaraderie shared among members.
- 2) As a result of many factors, including the level of turnover among city managers and others in executive positions, **employees are genuinely concerned about the direction and future of the organization**. No unifying mission or compelling vision statement(s) are being utilized to coalesce the city’s workforce toward the future.
- 3) The **level of trust between employees and management varies greatly**. As mentioned, one of the limitations of this assessment is that employees from the various departments participated together in the focus groups held. Consequently, it is difficult to identify with any level of precision in which departments the level of trust varies so greatly. Trust is influenced by a number of factors, with the most dominant one being the individual relationship between an employee and their manager or direct supervisor. Therefore, there are some managers/supervisors within the organization who value relationships and invest time, effort, and energy in building and sustaining those relationships, while others choose not to. The managers/supervisors that are investing in those relationships understand trust is the currency which fortifies their relationships with their staff.



Lack of trust fosters feelings of anxiety, fear, and reluctance to be honest. It also leads to emotional fatigue, draining energy from employees. When a workplace culture drains people instead of refuels/reenergizes them, it leads to apathy, burnout and the lowering of morale which undermine the organization's performance.

- 4) **Critical comments expressed by members of the City's governing body have resulted in a feeling among employees of being unappreciated for their contributions.** Furthermore, comments such as these stifle employee creativity which is essential to creative problem-solving options the governing body would consider in their efforts to build a vibrant community.
- 5) **There are credibility concerns about those serving in executive leadership positions.** Factoring in the turnover and impacts from COVID-19 resulting in the inability to convene employees in an in-person setting, along with questionable decisions as perceived by some employees, a credibility gap exists. Effective leaders are relationship-centric and recognize that credibility is the outcome of building and sustaining healthy relationships with employees.
- 6) **The impacts from COVID-19 on the workforce and workplace continue and it appears to have weakened the sense of a shared purpose among select employees.** As employees return to their offices, albeit it for some employees it may not be the same schedule as was prior to the pandemic, leaders and managers should invest time in helping their employees re-adjust and ensure the transition is smooth and people recommit to each other. At a time characterized by uncertainty and anxiety regarding employee health, safety, and financial security, research completed by Gallup has found that employees look for leaders who embody four universal attributes: trust, compassion, stability, and hope.
- 7) **The contribution by those in leadership and management roles can be improved.** Several comments indicate it's an area that requires immediate attention. Seniority does not always translate to competence nor does technical proficiency render supervisory effectiveness. Leading employees from multiple generations also creates several unique challenges.
- 8) **Staffing levels** are a topic for further examination. This study did not include an analysis of staffing levels by department however this topic was raised several times by employees. In particular, about ever-increasing workloads and the all-too-frequent shift in priorities.
- 9) **Executive Leadership Team (ELT)** has more potential than is being realized. While the Mayor and City Council serve as the Board of Directors for the community, the role of the ELT is the equivalent for the organization's workforce.

Employees are seeking leadership and assurance from this group and are not receiving it.

- 10) **It appears most employees affiliate with their department and not as much as with the city itself.** While this is fairly common, and is neither positive nor negative, the impacts from remote work may increase this type of affiliation. On the surface, it's healthy for employees to identify with their department however it can reinforce a siloed approach to city operations.
- 11) **The Performance Review/Appraisal/Evaluation process has mixed results.** Certain employees find it helpful, while others do not. Beyond concerns about the existing instrument/tool, capabilities are vastly different across the organization for supervisors and managers in their respective approaches to managing their employees' performance.
- 12) **The availability of training that is offered is limited, in particular for supervisors and managers.** Equipping managers and supervisors with the skills and capabilities necessary to be successful in leading an ever-evolving workforce must be mission-critical.
- 13) **Annual Individual Development Plans (IDPs) for employees are not prepared and implemented.** IDPs are written plans that identify the expected skills, knowledge, or competencies an employee will need to develop over the next year. Many studies emphasize the employee benefits of IDPs, but organizations are mindful of the two main reasons to use them: to guarantee employees have the skills necessary for today and to ensure their organization's future sustainability and effectiveness.
- 14) **There are concerns about the factors utilized in the process utilized for employee promotions.** The process used across the organization is riddled with ambiguity and uncertainty. These processes should be refreshed and clarified for all employees, so they have a clear understanding of both the process to be used and the qualities, characteristics and capabilities managers are seeking in high-caliber candidates.
- 15) **Communication between management and employees is uneven.** Similar to trust, in organizations of all sizes, the frequency and effectiveness of communication is a frequent complaint among employees. For some employees there is never enough, while others believe there's sometimes too much. The question is do employees have timely and relevant information that is essential for them to do their jobs effectively. For those managers and supervisors who value building and sustaining effective working relationships with their own staff, as well as co-workers, trust and communication tend to be their strong suits.

The “grapevine” appears to be a heavily used in Manteca as a mechanism to communicate a variety of subjects. Unfortunately, gossip is often untrue and appears to be filling the void which accurate and timely communication should have filled. In turn, when gossip is not responded to by credible leaders and managers it fosters speculation and negativity.

- 16) **Employee involvement in decision-making ranges a great deal.** Managers and supervisors who value the building and sustaining of workplace relationships typically engage their employees in various decision-making opportunities. They firmly believe in the adage of “participation breeds commitment” as it relates to employee engagement. Often when stress occurs in the workplace, such as that resulting from COVID 19, people can over-correct by clamping down on the decision-making process thus disempowering their people. While much of the city is focused on compliance related activities, it is vital for those in management roles to realize approaching their workforce with the same mindset (i.e., compliance) is often ineffective and can derail employees exercising initiative. The idea is to provide “freedom within a framework” providing employees the discretion required to make decisions and move the city forward.
- 17) **Succession planning** to fortify the internal bench of potential successors is not happening with any reliability. With the shifting workforce demographics and aging workforce, having a planned approach to succession planning has become mission-critical for continuity of operations. Providing opportunities for employees to learn and grow does not necessarily mean being promoted but can be about job enlargement thus expanding their capabilities to assume new responsibilities.


In summary, I describe the current workplace culture as Hurting. That is to say, a number of emotional responses were shared by employees through the various channels that expressed serious and deep-seated emotions of neglect, fear, and hopelessness. In order for the culture to get stronger – Healthy - thereby creating a better work environment for employees and serve as a driver to higher organizational performance, a healing process must be undertaken. The following diagram illustrates this journey:



## Workplace Culture Examples from other Local Governments

Prior to providing recommendations intended to help Manteca transition from hurting to healing and onto a healthy workplace culture, the following are examples from other local governments. In particular, the content of the culture they were seeking as the foundation for their workforce.

### City of Mankato, Minnesota – pop. 42,093



**Vision**  
 Leading the way as a vibrant, diverse, regional community.

**Leadership Philosophy**  
 We belong to an organization that cares about making a positive difference in the lives of others. Our work is challenging and has purpose. We listen and engage with each other and our community.  
  
 We are empowered and trusted to make good decisions that align with Public Service Principles and Core Values. Our organization is committed to investing in and developing each other. We will recognize and celebrate our collective achievements and individual accomplishments.

**Public Service Principles**  
**Responsive**  
 Prompt to respond and serve.  
**Efficient**  
 Highest performance at greatest economy.  
**Greater Good**  
 Serve for the good of the community and region.  
**Innovation**  
 Embracing new ideas and methods to improve service delivery.  
**Open**  
 Spirit of accessibility in policy making and operation.  
**Neighborly**  
 Concern and compassion for others.

**Core Values**  
**Positive attitude**  
 We take a positive approach, show initiative and a willingness to improve. We take pride in the work we do.  
**Accountability**  
 We take responsibility for our actions and the completion of our work.  
**Respect**  
 We treat everyone with courtesy and dignity and value their perspectives, acknowledging our differences.  
**Teamwork**  
 Together, we collaborate on ideas and share information, resources and responsibility for the best possible outcomes.  
**Integrity**  
 We lead by example by being honest, doing the right thing and following through. Our actions reflect our words.

**Employee motto:**  
**Work hard.**  
**Have fun.**

### Adams County, Colorado – pop. 504,018



**CULTURAL NORMS**

**Support and Encourage**

- Be open-minded and consider new ideas
- Support continuous, personal, professional and organizational improvement
- Engage in teamwork and collaboration
- Celebrate accomplishments
- Be positive in all circumstances and optimistic for success

**Demonstrate Respect**

- Exhibit integrity and accountability in one's actions and words
- Be honest, genuine, truthful and direct
- Value others by demonstrating courtesy and consideration
- Promote inclusion of others' opinions and perspectives
- Treat others with kindness and dignity

**Exhibit Fairness**

- Provide consistent and unbiased treatment to all employees
- Resolve disputes and conflicts
- Adhere to policies and procedures consistently at all levels of county government
- Listen to and consider all sides of an issue before taking action

**Communicate Effectively**

- Listen first and seek to understand
- Clarify your intent
- Share and seek relevant information
- Be reasonable, consistent and timely with your responses
- Be honest, direct, courteous, and considerate
- Be open to feedback and focus on solutions

**Be Trustworthy**

- Demonstrate accountability and reliability by following through and accepting responsibility
- Be honest with others
- Be credible, consistent and do the right thing
- Be loyal to the absent

**Mission**  
*To responsibly serve the Adams County community with integrity and innovation.*

**CULTURAL COMPETENCIES**

**Employee Morale**  
 The organization understands the importance of staff morale and motivation.

- Everyone helps create a safe, professional, comfortable and pleasant work environment.
- Adams County leadership actively supports and champions recognition and reward programs for staff.

**Workplace Flexibility**  
 Employees have the schedule flexibility to encourage work-life balance and meet individual needs.

- Create an environment that values employees and enables them to improve their quality of life and manage personal and family responsibilities.

**Doing the Right Thing**  
 The organization adheres to high standards and practices in its relationship with employees and the public.

- Publicize the positive work, success stories and good things being accomplished in the county.
- Proactively practice and promote the county's norms.
- Demonstrate good stewardship of public trust and resources.

**Working Together**  
 Everyone works together to get the job done and keep work flowing to effectively serve the citizens of Adams County.

- Provide information and share knowledge among agencies using various means to ensure the community is appropriately and accurately informed about county news and services.

**Job Satisfaction**  
 Employees are happy in their jobs and would recommend the organization to anyone as a good place to work.

- Managers and supervisors provide an open and safe environment for staff to address work issues, communicate effectively, and respond thoughtfully and honestly with actions or answers to questions or concerns.
- Ensure that job expectations are achievable and goals are well defined.
- Empower, encourage and reward staff for innovation and continuous improvement.

## City of Tucson, Arizona – pop. 541,482



## City of McKinney, Texas – pop. 182,055

**Our work is driven by our values.**

**Respect.** We support a healthy work environment.

- We value and respect each other.
- We are loyal, dependable and empathetic teammates.
- We embrace inclusion, diversity, fairness and open communication.
- We are trusted by our leaders to use judgment, take risks and make decisions.
- We foster a family-oriented culture that includes understanding, support, balance and fun.

**Integrity.** We model ethical behavior.

- We are honest.
- We do the right thing, always.
- We are open and transparent in our words and actions.
- We hold ourselves and co-workers accountable to high ethical standards.
- We appropriately question actions that may be inconsistent with our core values.
- We are committed to building and maintaining trust in one another and our community.

**Service.** We are selfless public servants.

- We serve and help others.
- We are caring and compassionate.
- We treat everyone the way we wish to be treated.
- We deliver exceptional service to internal and external customers.
- We are led by servant leaders, at all levels, who care about and support us.
- We never forget that we exist to make McKinney a better place to live, work and raise a family.

**Excellence.** We are competent and dedicated.

- We pursue excellence.
- We search for opportunities to learn and grow.
- We are accountable for our work and always do our very best.
- We are given challenging work by leaders who empower and support us.
- We are responsible stewards who embrace innovation, efficiency and improvement.
- We are a unified team that supports the goals and vision established by our elected officials.

The intent is not for the City of Manteca to simply cut-n-paste from these examples, but to consider what other local governments have established to recreate their workplace culture. Each of these efforts required substantial input from many workforce members and sustained commitment once these were adopted.

## Phase 4: Recommendations

*“If you always do what you’ve always done,  
you’ll always get what you’ve always got and that’s not good enough!”*

It’s practically impossible to name even a single highly successful organization, one that is a recognized leader in its field of endeavor, that does not have a distinctive, readily identifiable organizational culture. Most scholars and practitioners now recognize that the culture of an organization has a powerful effect on its performance and long-term effectiveness.

Manteca’s approach to renovating its culture demonstrates the goal of a culture-change initiative: to build capability purposefully and actively for new ways of working. It allows for new thinking, beliefs, tools, and processes. It is critical culture change not be perceived by employees as another in a series of fads, “management by best seller” as in a “flavor of the month”. Often employees are skeptical of these “just add water” fixes to the workplace. Failed attempts to change, unfortunately, often produce cynicism, frustration, loss of trust, and deterioration in morale among organization members. Employees must also understand that culture change is not only essential for the organization to adapt to new realities, but also that it will help them, and their fellow employees perform their roles better and derive greater job satisfaction.

Organizational change involves moving from the known to the unknown. The question is change to what? Employees invariably have expectations about the results of organizational change. These expectations play an important role in generating motivation for change. Expectations can serve a self-fulfilling prophecy, leading employees to invest energy in change initiatives they expect will succeed. When employees expect success, they are likely to develop greater commitment to the change process and to direct more energy into the constructive behaviors needed to implement it. The key to achieving these positive effects is to communicate realistic, positive expectations about the organizational changes. Information about why the change is occurring, how it will benefit the department, and how employees will be involved in the design and implementation is most helpful.

Managing change is the most important aspect of any effort to improve employee performance and organizational effectiveness. I view change management as a process, instead of an “event”, 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.



The following are what I refer to as the “Key Principles of Change” which I use when I’m partnering with a client and are the basis for the “Road Map” for helping Manteca to strengthen your workplace culture:

1. The person spearheading the change must be credible. If not, the change initiative will be unsuccessful.
2. Change in a particular person takes place at several levels: at the knowledge level (information about change, understanding its rationale); the attitudes level (accept the need for change and a particular measure of change both rationally and emotionally; and the behavior level (acting in support of effective implementation of change).
3. The art of leading change is about two things: Knowing what needs to be preserved (the ‘roots’) and what needs to be changed (the ‘anchors’ that are weighing down the culture).
4. Successful change is a continual journey of learning, growing, improving, adapting, and managing the change process. Staying the same or relying on past success is a formula for eventual failure.
5. Quick-fix solutions rarely last. A successful change effort takes time.
6. The incentives (positive or negative) for change must be greater than the incentive (reasons and excuses) for keeping the status quo (not changing).
7. A change effort seldom succeeds without the support of one or more change champions.
8. The change process (how change is accomplished) is equally as important as the change product (what is targeted for change). The appropriate steps must be conducted correctly for change to succeed.
9. Involving the employees of the organization in the change process increases their understanding, commitment, and ownership.
10. Positive change is more effective than negative change. In other words, adopting new behaviors and practices is more likely to be successful, than simply telling employees to stop doing something.

The biggest part of renovating anything – whether it’s a room, a building, or an entire organization – is understanding what stays and what goes. In each, it’s vital not to let sentiment get in the way of progress – a common misstep. That’s a big reason why gathering input from multiple voices was so important; it not only illuminates what the culture is today, but also helps determine the most positive and valued aspects of the

organization's historical culture to carry forward. According to research, 57 percent of organizations that were highly successful in renovating their cultures were very intentional in ensuring that the best of the organization's existing norms were preserved, and fundamental values and history were woven into the new culture.

**Based on research of organizations of various sizes in all sectors, leaders and employees need to be aware of the three types of culture that exist.** The first is the culture of *control*. In this culture, most people/employees feel controlled by one or more of the following types: autocratic leaders, micromanagement, too many rules, or bureaucracy. A culture of control breeds an environment in which people fear making mistakes and taking risks. It is stifling – undermining innovation because people are afraid to speak up. Employees may feel left out, micromanaged, unsafe, hyper-criticized or helpless. The second is culture of indifference, in which most people feel the people they work for don't care about them and see them merely as a means to an end. Both cultures of control and indifference make people feel unsupported and lonely.

The ***optimal culture is a connection culture***. In this type of culture, most people describe feeling connected to their supervisor, colleagues, their work, the organization's leaders, and the people the organization services. When people feel these connections, they thrive individually and collectively. **It is recommended the City of Manteca pursue a Connection Culture as the preferred workplace culture.**

A connection culture is created when leaders communicate an inspiring vision, value people, and give them a voice to express their ideas and opinions. An easy way to remember this is **Vision + Value + Voice = Connection**. A connection culture provides several benefits to organizational performance, that taken together, add up to a power source of high performance and organizational success.

- **Vision** exists in a culture when everyone is motivated by the mission, united by the values, and proud of the organization. For example, employees offer the following statements:
  - “We’re creating something new or doing something bigger than ourselves.”
  - “We create something of lasting value.”
  - “We have a clear strategy and direction with a shared mission and goals.”
  - “I can make a difference in my role.”
  - “We have values I care about and that we lived up to.”
- **Value** exists in a culture when everyone understands the needs of people, appreciates their positive, unique contributions, and helps them achieve their potential. Sample statements include:
  - “There is mutual respect and leaders care about people first.”
  - “Leaders do the right thing...they are credible.”



- “We have discretion and are trusted and empowered to make decisions.”
- “My role fits my interest and strengths.”
- “My supervisor cares about me as a person and helps me learn, develop, and grow.”
- “We enjoy our work and our co-workers.”
- **Voice** exists in a culture when everyone seeks the idea of others, share their ideas and opinions honestly, and safeguards relationships.
  - “We see that we are making progress in our work.”
  - “Our work is done with excellence. We have high standards.”
  - “We deliver positive results.”
  - “We hire and promote talented people.”
  - “We celebrate milestones.”

It is recommended that the intent should be to actively pursue a targeted approach – **toward a Connection Culture** – that blends the best aspects of the existing culture with emerging dimensions required for it to maintain organizational effectiveness. Careful attention must be paid in these efforts as any attempts to change it may “collide” with the existing culture and the status quo can prevail. Remember, not everyone is for progress, especially those employees who stand to gain the most by maintaining the status quo.

There are four organizational benefits of a **Connection Culture**:

- Employee Engagement: Employees who feel connected care about achieving results, so they exert additional effort and persevere. Disconnected and disengaged employees show up for the paycheck and give the minimum level of effort that is required to keep their jobs. In short, engaged employees focus on what they give, whereas disengaged employees focus on what they get.
- Strategic Alignment: Because employees who feel connected care about achieving results, they are more likely to align their efforts with their supervisor’s and organization’s goals. Organizations with greater connection, therefore, experience a higher percentage of employees pulling in the same direction.
- Quality of Decisions: Employees who feel connected because they care about their organization’s performance, are willing to speak up and share information that decision makers need to hear to make optimal decisions.
- Innovation: Employees who feel connected engage in creative conversations that contribute to the marketplace of ideas in an organization, and this acts to increase creativity and innovation. When a robust marketplace of ideas exists, people have more opportunities to potentially connect the ideas which will result in new services, processes, and programs.

Considering the existing culture in the City of Manteca, none of the four benefits described above seem to be occurring on a regular basis throughout the organization.

Slightly unconventional but nonetheless relevant is the organization's collective mindset. Not simply about its strategic orientation, but it's general self-esteem, self-confidence, and self-efficacy. Self-efficacy for an individual is the confidence in one's own ability to succeed. People with unrealistically high self-efficacy assume they will prevail at difficult tasks, even if they lack the proficiency to do so. People with excessively low self-efficacy are likely to give up, even when they could actually succeed.

You can be certain that there will be resistance to culture change. But readiness for organizational transformation can be fostered by identifying the advantages of the refreshed culture, sharing the disadvantages of not changing, showing the gaps between current performance and the organization's potential, providing the resources needed to implement change, and rewarding behaviors compatible with the preferred culture.

Strong, focused, and sustained commitment is required to successfully implement the recommendations from this report and impact the city's ability to provide valuable services in a positive work environment. Often with change initiatives, there is an inclination to simply do that which is easiest or least controversial. While that may be the most expedient course of action, it may prove fleeting.

**Based on the set of Current Practices captured, the following is a series of recommendations using *Connection Culture* as the preferred workplace culture framework**

1. **The Interim City Manager should define culture change as a compelling element of organization strategy.** Unless the proposed change finds its way into a grander set of organizational priorities, it is unlikely that the change will be sustainable over time. The reality in most organizations today is that organizational priorities are driven by the annual budget cycle. It will be difficult to sustain the change effort unless there is a clear and unambiguous reason for it. Linking the culture change to organizational strategy creates such a purpose.

Communication to all employees should occur through many channels and focus on what the culture renovation seeks to change, what the future looks like, why the culture change is vital to the success of the organization now and looking ahead, and why all employees should care.

2. The change process must be assigned to a group of staff persons who have credibility in the minds of those being the most impacted. Every organization has a pool of change agents that usually goes untapped. These people are referred to as a network of positive energizers and are viewed as "key influencers." Spread randomly throughout the organization these are purpose-driven people with an

optimistic orientation. They naturally inspire others. They're open and willing to take initiative. Once enlisted, they can assist with every step of the cultural change.

Employee participation breeds commitment, especially as it relates to implementing change. When employees are genuinely involved in the performance of their respective roles and the entire organization, their commitment increases. Remember, no one washes a rental car, so you want people to "have skin in the game." Not intended to be an efficient process, including employees (at least those who are interested) in the moving your organization forward is a wise investment.

**It is recommended, a group of 12 to 15 city employees (selection process to be determined for membership) referred to as "Common Threads" be assembled and responsible for helping oversee the culture change process.** "Commons Threads" was selected because it is emblematic of what these employees represent – the culture serves as the threads which bind together workforce members.

This group of "change champions" will play a crucial role in transitioning the culture. Specifically, they will:

- ❖ Participate in a series of learning/training workshops that focus on the culture renovation process and their particular role serving as visible, vocal advocates.
  - ❖ Learn, via training workshops, basic facilitation skills in order to partner with city departments to either create or refresh their mission, vision, and values.
  - ❖ After attending a "Train the Trainer" deliver to city employees a workshop emphasizing the behaviors which support a "Connection Culture."
3. **Identify a more expansive role for Managers and Leaders:** Transformation journeys run out of steam when organizations neglect leadership development. In order to keep the City moving in the desired direction, executives and managers at all levels must understand which mindsets and behaviors will take the organization there and then take care to model them so employees know how to act/perform in the new context.

There is a trust-deficit in the City of Manteca by employees toward the leaders of the organization. Moreover, there appears to be a perception among employees that many of those in leadership roles demonstrate a command-and-control approach to leading.

About three quarters of respondents to a recent survey conducted by Glint believe employee engagement is highly linked to supervisory relationships, leadership trust, and organizational culture. The top two factors fall clearly into the realm of leadership. To be engaged, employees must trust leadership. This includes building a trusting relationship with immediate supervisors, of course, but it also implies trust in other organizational leaders, including those at the top.

The role of executives, directors and senior managers director and others in a supervisory/management role is unique and has tremendous influence in “setting the tone” of the culture. Employees’ base what they believe is a priority and what is/is not acceptable on what they observe from those in leadership and management capacities. The influence of leaders and managers is far-reaching towards influencing the department culture.

Successful leaders also recognize that although aspirational talk about culture may originate at the executive level, the actual culture manifests itself in cubicles and in the field far from top leaders’ purview. That disconnect makes it essential that top executive do more than talk a good game.

The dynamic processes of culture creation and management are the essence of leadership and make one realize that leadership and culture are two sides of the same coin. Consequently, the backdrop to fortifying the workplace culture is the role of city leaders, managers, and supervisors. Some of the mechanisms that leaders use to communicate their beliefs, values and assumptions are conscious, deliberate actions; others are unconscious and may even be unintended. Leaders also may be conflicted and may be sending mutually contradictory messages.

What should City of Manteca executives, directors, managers, and supervisors develop? The following criteria – Leadership Framework – captures the twelve competencies/capabilities essential for successful public-sector leaders and is provided for consideration.



- ❖ **Self-Awareness** – Leaders practice self-inquiry, explore to understand who they, are and are open to continuous learning. Combined with communication skills, this includes the development of Emotional Intelligence (awareness of self and others). Leaders must continually aspire to be persons of integrity.
- ❖ **Resilient Attitude** - Maintaining and conveying a positive, generous, and resilient demeanor in your approach, words, and tone.
- ❖ **Communication** – Leaders demonstrate the ability and willingness to interact with others – staff members, peers in other agencies, etc. – to develop trust, manage conflict, confront issues, and support mutual purpose.
- ❖ **Decision-making** – Identifying and considering multiple options, assess the advantages and disadvantages of each and selecting the course of action closest to the desired outcome.
- ❖ **Strategic Thinking** – Leaders create a vision and balance short- and long-terms goals to attain that vision. Are also willing to challenge, and sometimes, disrupt the status quo.
- ❖ **Leading People** - Leaders who have good skills in directing and motivating people know to how interact with staff in ways that motivate them. They delegate to employee effectively, broaden employee growth opportunities, act

with fairness toward direct reports, and hire talented people for their teams. CEO also can mean Chief Example Officer.

- ❖ **People Builder.** Leaders develop members of their staff by creating relationships that identify the other person's professional needs and interests. This skill enables leaders to provide resources that develop new organizational leaders, and thus, maintain high performance for the organization.
- ❖ **Knowledge.** Leaders are knowledgeable regarding their industry, profession, and business operations. They are able to leverage this knowledge into action and results.
- ❖ **Achieve Results.** Leaders establish stretch goals for their workforce and organization and ensure results are accomplished.
- ❖ **Political Savvy.** Ability to navigate relationships among complex, emotional, and/or value-based issues in order to influence and achieve positive results.

**One of the most effective development techniques to equip city executives, managers and those who aspire to serve in such a role with the capabilities of being a successful leader, is a formal training program. A training program can offer structured learning experiences that apply directly to their roles.** The general purpose of training involves knowledge and skill acquisition and will have three goals: (1) to improve an individual's level of self-awareness; (2) to increase an individual's skill in one or more areas of expertise; and (3) to increase an individual's motivation to perform his or her job well.

The **Learning/Training Program** objectives are to:

- ✓ Build the critical leadership competencies of managers and directors
  - ✓ Increase productivity
  - ✓ Strengthen communication among managers
  - ✓ Enhance the organization's capacity to handle strategic, complex, and critical issues in the future.
  - ✓ Identify potential successors for key executives and leadership roles who will carry on the mission and values of the city.
4. **Offer supervisors, managers, and executive leaders' opportunities to select and consult with a leadership coach.** In government, dealing with a wide range of thorny personnel issues is a given. A coach will listen attentively, identify blind spots, and partner with leaders to address people challenges in a safe, nonjudgmental environment. Alternatively, encourage employees to find trusted mentors who are outside of their chain of command to help them navigate

through key decision points regarding their careers, knock down roadblocks, and chart a path forward.

5. **Hold quarterly training sessions for the entire group of leaders, managers, and supervisors.** Convening this group periodically generates several dividends – increases a sense of belonging to the organization at-large and provides learning opportunities about their role in moving the workforce forward.
6. If employees don't know what to do, they do what they know. Shaping culture takes insight, persistence, and courage from leaders at multiple levels. Beyond mindset, the role of skillset is crucial. Training on behaviors is an important part of any culture change effort. When doing so, it's important to understand the behaviors needed to support the right type of culture. While leaders as teachers is one of the most effective ways to reinforce behaviors, it's clear that successful culture change relies on overall training across the organization. According to research, two-thirds of organizations that have successfully changed their culture provided training on the desired behaviors for employees at all levels so they can model these behaviors in their daily work.

**Members of “Common Threads” and a small select group of other employees will attend a “Train the Trainer” workshop on “Connection Culture” who will then, in turn, deliver the training organization-wide to all city employees.**

7. **Establish ceremonies and events that reinforce new ways of doing things – the “Connection Culture”** – such as awards ceremonies and recognition events for teams and employees who achieve or successfully implement changes. From service recognition to celebrations of special holidays, these types of gatherings (i.e., rituals) increase the sense of belonging among employees. Moreover, celebrating what it means to be a City of Manteca employee and the linkage between employees' contributions and the organization's success is extremely beneficial.
8. Especially when it comes to culture, leaders set the tone. If a leader is not demonstrating values espouse, few will follow, and any downstream effects will be perceived as disingenuous waste of time, money, and effort. When leaders see themselves as role models and follow the stated cultural values, employees will believe, follow, and benefit.

ELT members operate in what I refer to as the “Six Realms of Leadership”: 1) Self-awareness; 2) to the City Manager; 3) to colleagues on the executive leadership team; 4) to one's staff members; 5) to Mayor and Councilmembers; and 6) to members of the community.



**Executive Leadership Team (ELT) members should participate in a series of group development sessions (i.e., retreat/advance)** that are focused on strengthening their internal relationships and the city's workplace culture. The executive leadership team needs to become a cohesive team that share a common view. Members must be aligned on mission, strategy, and culture.

Specifically, the ELT should craft what is referred to as a purpose statement. A higher purpose is not about economic exchanges. It reflects something more aspirational. It explains how the people involved with the City of Manteca are making a difference, gives them a sense of meaning and draws their support. A good purpose statement captures why the organization does what it does, and it endures through time.

In creating a purpose statement there are a few guidelines to consider:

- **It should be relevant.** A purpose statement needs to speak to employees and citizens/residents of Manteca. It should relate to the services and programs provided by the City in its role as a community builder.
  - **It should operate on many levels.** The purpose needs to work on a macro level for large initiatives, as well as a micro level for everyday issues.
  - **It should evoke emotion and differentiation.** A statement should not be so bland that it sounds like it applies to any organization. Instead, it should be unique and powerful.
  - **It should be enduring.** A good purpose statement should be as relevant in the future as it is today.
9. The Mayor and City Councilmembers should be advocates for a healthy workplace culture. When criticism occurs by elected officials toward staff during a public meeting, the result is both a lowering of employee morale and a "chilling" effect on employees' seeking to challenge the status quo with new ideas.

**Mayor and Councilmembers should be briefed on the culture change effort being undertaken, the "Connection Culture" in particular and their individual and collective role as supporters.**

10. While a few departments have mission and values statements, others do not. Reaffirming and/or revising the current set of **organizational values** with a specific emphasis on identifying specific behaviors that exemplify the Connection Culture must be pursued. **Members of "Common Threads" will be trained to design and facilitate these sessions throughout the organization.**
11. More than ever, culture comes down to the choices organizations' make about people. If you hire for talent and for attitude, take the time to make deeply



considered decisions about who you want in your organization, and whose development, you want to invest in – the fit is stronger which fortifies the culture. This means hiring people not only with technological skills, but also those who understand customer experience and the practices needed to deliver it and have demonstrated behaviors which support a “Connection Culture”.

When principles are at the core of the organizational culture, you must hire for attitude first. You can train people on skills, but you can’t train them on attitude. Attitude is connected to behavior (which influences performance), whereas personality isn’t. **Employees must be a good fit. Hire for attitude, onboard for values, and train for skills.**

**A closer examination of the hiring process used by departments should be completed. Likely, there are a number of opportunities for the City of Manteca to emphasize culture fit as a high priority on the selection/hiring process.**

Talent selection decisions are an increasingly important determinant of organizational performance and success. For many organizations, they are the most mission-critical decisions they make. It is not new that selection decisions are crucial. What is new is their growing significance as a result of human capital becoming a more critical determinant of organizational effectiveness.

12. A key touch stone of workplace culture is **performance management**. According to a recent study, 68 percent of respondents agree that ongoing coaching and feedback conversations have a positive impact on individual performance. Making performance feedback and conversations between managers and employees forward-looking is another strategy for improving the experience for employees. Assessing and discussing future performance provides managers and staff with a more accurate understanding of their abilities to meet future needs and how to improve those abilities.

The **current performance appraisal/evaluation** process has mixed credibility, depending primarily on the supervisor who administers it. Organizational cultures vary on many dimensions, one of which is the emphasis on performance. Some cultures are based on entitlement, meaning that adequate performance and stability dominate the organization. Employee rewards vary little from person to person and are not based on individual performance differences. As a result, performance appraisal activities are seen as having little tie to performance and as being primarily a “bureaucratic exercise”.

At the other end of the spectrum is a performance-driven organizational culture that is focused on results. Performance appraisals link results to employee compensation and development. Studies have shown repeatedly that performance-driven organizational cultures positively influence to organizational success.

There is discrepancy throughout the city in managing performance consistently, in particular the design and usage of performance appraisals/ evaluations. Performers at all levels require timely, accurate feedback whether or not a potential increase in pay is under consideration.

The lack of a consistent performance philosophy, policy, and methodology not only hinders the city's ability to clearly establish and hold people accountable for results, but it also diminishes its capacity to deliver on its service commitments to its customers.

Today's conventional wisdom asserts that performance management is no longer a luxury for only the most advanced organizations but is a necessity for governments to function at an optimal level. **Moreover, the past practice of an annual performance appraisal being the sole component of performance management tactics used by organizations, must be replaced with a comprehensive and systematic approach comprised of leadership development, performance plans, goal setting, coaching, performance appraisals, and recognition.**

One of the biggest shifts in performance management in recent years the concept of giving employees ownership in the process. It helps employees have a stake in their own career, performance, and growth. Typically, the performance discussions where an employee has a say in the process, the goals and the development are substantially more effective. Based on input from employees attending the group meetings, the practice of a self-assessment as part of an overall approach to managing one's performance is not executed well. Some employees mentioned the form they filled out, was either summarily discarded by their supervisors or, at the opposite end of that practice, signed off by their supervisor.

When the feedback process is well-managed, meaning it is perceived as credible and accurate and is received in the manner it was intended, it has a significant positive correlation with performance. Of course, other individual and organizational aspects contribute, such as a feedback-rich environment and the individual employee's desire to engage in the conversation. Improving feedback is not only about training managers, but also about organizational culture, a sharp focus on performance, and holding leaders accountable for employee development.

#### Comparison of Old and New Performance Appraisal Approaches

Old Approach	Modern Approach
Annual discussions	More frequent conversations
Backward focused	Forward looking
Punitive	Growth oriented
Top down	Bottom up

From a practical perspective of changing performance processes, **a solid first step is to change the frequency of meetings to something unobtrusive, such as bi-annual (i.e., every six months).** What organizations often find is that when employees and managers get into the habit of talking on a more regular basis, the conversations may wax and wane throughout the year, but the result is more interaction and discussion than previously.

Feedback-rich cultures do not appear out of thin air but depend on structure, processes, and persistence. Even those managers who indicate they know what to say to help employees develop, and how to say it, need a support process to guide them. **Consequently, focused training should be provided on the do's and don'ts and in particular, methods and techniques on how to deliver feedback and manage performance in ways the drive individual employee performance.**

Employee satisfaction with feedback creates a virtuous cycle. It has a powerful and additive impact on performance. When employees receive feedback that they perceive to be valuable and intended to help them improve, other factors of performance are unlocked: utility ("I believe feedback will help me achieve my goals"), accountability ("I ought to do my job/role well"), self-efficacy ("I am able to perform the task"), and social awareness ("I take others' opinions of my work seriously").

13. Employees are motivated by jobs/roles that challenge them and enable them to grow and learn, and they are demoralized by those that seem to be monotonous or to lead to a dead end. Talented employees who feel trapped often leave their employers to find new challenges elsewhere.

It's no longer possible to hire someone who knows how to do a job and will continue to know how without development. **Investing in professional development is critical to ensure continued success by the city.** Employees who aspire to greater responsibilities will value leaders who recognize their leadership potential, talents, and contributions to the organization. Equipping them with the mindset and tools to become better leaders through coaching; mentorship; and progressive, sequential leader development courses sends a signal to high-potential aspiring leaders that the organization is investing in them. The scope of the methods of professional development can include leadership development, professional education, functional and technical training, certifications, mentorship, and coaching.

Retaining high-performing employees will often require leaders to come up with creative approaches that offer employees the opportunity to broaden their areas of expertise and assume greater leadership, managerial, and supervisory responsibilities while ensuring sufficient organizational bench strength to fulfill mission-critical responsibilities.

- a. **Enhance the existing Training Program:** A key to the city's continued level of success is renewing its commitment to developing exceptional leadership. The programming/curriculum can be enhanced, both in the type of workshops and the assembling of such in a programmatic format – such as for aspiring supervisors or current supervisors. In short, “Leaders at all Levels” should be considered as the backbone of such a renewed emphasis on training.

For organizations that want to capitalize on their employees' drive to excel, programs that develop all employees' leadership competencies are essential. These programs not only increase what people can contribute to the organization's success, but they also send a message to other employers that the city is serious about targeted investment in its people. Likewise, they can play a key role in attracting and retaining the individuals you want as today's and tomorrow's leaders.

- b. **Examine the current promotional processes utilized in all departments. Efforts should be made to modernize the approach with a strong emphasis on transparency, so all employees interested are exposed to the competencies necessary to advance and the processes to be used to determine candidate qualifications.** Granted, a promotion should not be an entitlement, while at the same time the process to advance one's career shouldn't be a mystery.
- c. **Create stretch assignments and other career opportunities.** For more junior employees who feel like they've hit a brick wall in their careers, inquire about and facilitate their pursuit of broader professional interests through intraorganizational detail opportunities. Leaders may be reluctant to let employees explore possibilities due to fears that no one is there to backfill any openings, but it is important to create a culture of mobility where your employees can make lateral moves or assume temporary promotions. That requires the organization to build redundancy and maybe cross-train employees so that they are equipped to perform a variety of functions. Otherwise, employees who feel maxed out will likely leave.

14. **Re-administer the “Ten Dimensions” Workplace Culture employee questionnaire in twelve months to determine level of progress made as perceived by employees.** The initial excitement and activity of changing often dissipate in the face of the practical problems of trying to learn new ways of doing business. A strong tendency exists among many members in organizations to return to what they already know. However, just as diets should lead to changed eating habits and working out must become part of one's lifestyle for both activities to generate the desired results, change must take hold and become art of the fabric of how an organization conducts its business. By re-administering

the questionnaire, areas of progress can be noted, mid-course corrections can be made and efforts to reach the next level of success can be undertaken.

Transitioning through the Healing process to Healthy requires patience, perseverance, and optimism. True culture change goes beyond the completion of individual projects. For culture change to be effective, you have to get people to think differently and act differently in their everyday work. As you work through culture change, stay alert to needs for change in everyday work—and in the infrastructure that supports work: performance-management processes, daily feedback, measures and reports, policies and procedures, and reward systems.

In summary, there is inevitable overlap resulting from the various recommendations as culture is ubiquitous in an organization, it's not operating in isolation. The most important conclusion to be derived from this analysis is that culture is a multidimensional, multifaceted phenomenon.

## D. IN CLOSING...

Creating and maintaining a healthy workplace culture is painstaking work. Attempts to shape a culture are not simple transactional changes but require a steadfast focus and commitment throughout the city workforce. The City's current culture already contains the components it needs to fuel successful transformation, and leaders' effect lasting, positive culture by encouraging behaviors that promote those elements. You don't need to replace your old culture you need to find the aspects of it that can help you move forward.

Trust is delicate to manage within any workplace. It can take a long time to establish but only moments to destroy. Leaders must be mindful of the promises and commitments they make to themselves and to others and where they are not following through. Credible leaders own where they have fallen short and then recommit to being more accountable to honoring their word.

Every great workplace culture is based, in part, on intrinsic attraction and emotional commitment to important aspects of the organization. People want to feel rewarded and recognized. They want to feel the pleasure of being a contributing member of a team. They want to learn and grow. They want to work with others who are capable and committed. They want to be a member of workforce culture that fosters all these qualities. When they find such a culture, they choose to be a part of the organization. Work is no longer transactional. They are reminded of the passion and curiosity that led them to their chose field and this employer. The feel they can excel at their role, and they are ready to experience feelings of price, belonging, adventure, achievement, and other personal benefits of accomplishment.

We live in an age of notoriously short attention spans. That applies as much to organizational culture as it does to people's media consumption habits. When people hear about new high-profile initiatives and efforts, and then don't see any activity related to them for several months, they'll disengage and grow cynical. It is critical that employees believe the culture change is not an exercise that they are subject to, but a meaningful process in which their involvement is enlisted. Employees must also understand that culture change is not only essential for the organization to adapt to new realities, but also that it will help them, and their fellow employees perform their roles better and derive greater job satisfaction.

Without a doubt, the toughest challenge faced by leaders during a culture change is to avoid backsliding into dysfunctional routines – habitual patterns of negative behavior by individuals and groups that are triggered automatically and unconsciously by familiar circumstances or stimuli. Employees need help maintaining new behaviors, especially when their old ways of working are deeply ingrained and unhealthy. Effective change leaders provide opportunities for employees to practice desired behaviors repeatedly, while personally modeling new ways of working and providing coaching and support.

Indeed, many efforts to improve organizational performance fail because the fundamental culture – values, ways of thinking, managerial styles, approaches to problem-solving – remains the same. Even when procedures and strategies are altered, organizations quickly return to the “we’ve always done it that way” status quo. Consequently, city leaders at all levels must be visible and vocal advocates about pursuing a “Connection Culture.”

Understandably, culture change can be difficult and challenging work, yet the dividends are extremely beneficial in helping transition or even transform an organization to achieve unprecedented results. Since culture change is a continuous process, the work to support culture change will be on going. It will be slow and trying before it is rewarding. Helping your organization surf the waters of change is not a sport reserved for vacations—it's a way of life for those who realize the best days for the City of Manteca are in front of it!

February 18, 2025

City of Mt. Pleasant  
320 W. Broadway  
Mt. Pleasant, MI 48858  
Attn: Heather Bouck, City Clerk

**RE: RFP for Consultant Services for Workplace Climate Survey**

Dear Ms. Bouck:

I am writing to express our interest in assisting the City of Mt. Pleasant to conduct a workplace climate survey for both full-time and part-time union and management employees. At PRADCO, we have a 70-year history of assisting organizations in all industries in selecting, developing, engaging, and retaining individuals who align with their culture and contribute to overall success and promotes improved organizational dynamics. To that end, we currently partner with over 250 public sector organizations in various capacities whether it be engagement surveys, pre-hire assessments, safety force psychological and promotionals, training workshops, leadership coaching, recruitment, etc.

Our experience encompasses the entire process of organizational climate surveys, from inception to completion. We specialize in data gathering, thorough analysis, and the presentation of survey results. Additionally, we provide actionable recommendations based on our findings, ensuring that the results are delivered in a comprehensive report while maintaining the confidentiality of all respondents.

We are committed to delivering insights that can help the City better understand and enhance the workplace environment for its employees.

We look forward to the opportunity to collaborate with the City of Mt. Pleasant on this initiative.

Thank you for considering our proposal.

Best regards,



Joseph Lubin  
Senior Director of Public Sector Services  
330.241.9111; [jlubin@pradco.com](mailto:jlubin@pradco.com)

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**Corporate Headquarters**

178 East Washington Street, Chagrin Falls, Ohio 44022  
[www.pradco.com](http://www.pradco.com) | (440) 337-4700

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CONFIDENTIAL

# PRADCO ENHANCED VIEW ENGAGEMENT

December 1, 2019

## 2019 Employee Engagement Survey

### Sample Enterprises



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#### Corporate Headquarters

178 East Washington Street, Chagrin Falls, Ohio 44022  
[www.pradco.com](http://www.pradco.com) | (440) 337-4700

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# 2019 ENGAGEMENT SURVEY – SAMPLE ENTERPRISES

## INTRODUCTION

Employee engagement is the degree to which employees are invested in the organization.

Organizations with a highly engaged workforce are more effective at reaching their goals and retaining their staff than those where engagement suffers in one or more areas. PRADCO has developed the Quick View™ Employee Engagement Survey as a means of efficiently diagnosing areas of strength and opportunity for an organization. This report consolidates data from the overall summary as well as the group breakdowns in a way that highlights important themes and opportunities for improvement.

- A total of 60 items covering 10 major content areas were presented as part of this survey:
  - Organizational Culture
  - Role Definition and Expectations
  - Nature of Work
  - Employee Development
  - Recognition and Appreciation
  - Communication
  - Pride in Job
  - Relationship with Coworkers
  - Supervision
  - Executive Leadership
- Each statement had four options: Strongly Agree, Agree, Disagree, and Strongly Disagree
- Two open-ended questions were also presented to employees:
  - What are things about Sample Enterprises that make you like working here?
  - What would you change at Sample Enterprises to make this a better place to work?

## REPORT CONTENTS

- Survey overview
- Participation and engagement breakdown
- Key areas of strength and opportunity for Sample Enterprises across all ten dimensions as identified by PRADCO when interpreting the results
- An executive summary
- Suggestions for building engagement at Sample Enterprises

# 2019 ENGAGEMENT SURVEY – SAMPLE ENTERPRISES

## SURVEY OVERVIEW

- The survey was administered between September 10<sup>th</sup> and November 15<sup>th</sup>, 2019
- 141 of 175 employees completed the measure, for a response rate of 80.6%
- Breakdown reports were computer-generated for the following categories:
  - Full/Part-Time Status
  - Tenure with the Organization
  - Job Classification
- Overall engagement for your organization was 76%.

## PARTICIPATION AND ENGAGEMENT BREAKDOWN

BREAKDOWN	# OF PARTICIPANTS	PARTICIPATION PERCENTAGE	ENGAGEMENT PERCENTAGE
	Total = 141/175	Overall = 80.6%	Overall = 76%
<b>Full/Part-Time Status</b>			
Full-Time	107/133	80.5%	84%
Part-Time	34/42	80.1%	68%
<b>Tenure with the Organization</b>			
Less than 2 years	38/45	84.4%	81%
2-5 years	12/17	70.1%	67%
6-9 years	26/35	74.3%	70%
More than 10 years	65/78	83.3%	87%
<b>Job Classification</b>			
Accounting/Finance	3/3	100.0%	78%
Assemblers	23/28	82.7%	83%
Customer Service	10/14	71.4%	73%
Engineering	17/20	85.0%	63%
Executive Leadership	5/6	83.3%	93%
Human Resources	4/4	100.0%	69%
Information Technology	16/18	88.9%	74%
Logistics	6/8	75.0%	72%
Machinists	20/23	86.9%	57%
Maintenance	8/15	53.3%	71%
Management	4/5	80.0%	91%
Quality Assurance	3/3	100.0%	64%
Sales	15/16	93.8%	97%
Team Leads	7/12	58.3%	85%

# 2019 ENGAGEMENT SURVEY – SAMPLE ENTERPRISES

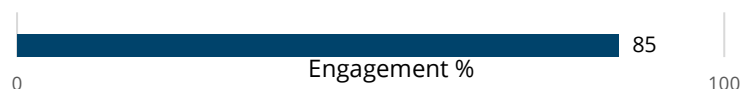
## KEY AREAS OF STRENGTH AND OPPORTUNITY

### Relationship with Coworkers



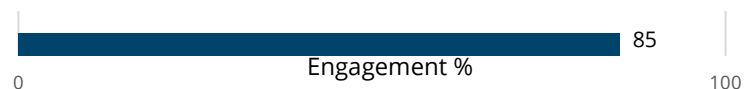
- ✓ Relationships with coworkers are widely regarded as a buffer for job-related stress
- ✓ More than 90% of those who took the survey feel welcomed and accepted by coworkers
- ✓ The vast majority of employees (87%) feel like they are treated with respect
- ✓ Several open-ended comments refer to the family atmosphere and the helpfulness of coworkers when issues or concerns arise
- ✗ Part-Time workers have significantly lower average scores and could be better integrated

### Pride in Job



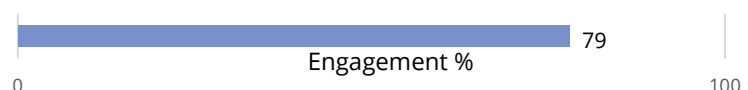
- ✓ Most people would recommend working here; recruitment incentives might be worthwhile
- ✓ Numerous people mention that this is a great place to work in their positive feedback
- ✓ Employees with the most tenure also had the highest average Pride in Job; giving them opportunities to instill this pride in newer staff during onboarding is suggested
- ✗ A sizeable group of people feel their job-related skills could be better utilized; from an operations perspective, a resource optimization study might be beneficial

### Nature of Work



- ✓ Staff are largely pleased by the extent to which their suggestions are taken seriously
- ✓ People are clear on the direct impact their actions have on results and the way the organization is viewed by outsiders
- ✓ Open-ended responses reflect the balance of challenge and low job stress that exists
- ✓ Workers in 10 out of 14 job groups were unanimous in agreeing that their bosses let them know they are needed
- ✗ Those in non-managerial roles appear to question the importance of their job to the company's success more than Managers and Executive Leaders

### Executive Leadership



- ✓ Respondents broadly agreed that Executive Leaders work constructively with employees
- ✓ There's a general belief that positive changes are happening at Sample Enterprises
- ✓ Executive leaders appear to have a strong vote of confidence from their Managers
- ✗ Some suggested in their feedback that a general lack of awareness exists around what employees experience at the ground level
- ✗ Employees who have been with the organization from 2 to 5 years had a notably lower average score for this dimension and may feel out of touch with Executive Leadership

# 2019 ENGAGEMENT SURVEY – SAMPLE ENTERPRISES

## Supervision



- ✓ People generally enjoy working for their supervisors and feel they are well-qualified
- ✓ Satisfaction and tenure are strongly related, supporting the impact of person-supervisor fit
- ✓ The flexibility some Managers show was highlighted in the positive open-ended comments
- ✗ Supervisors in Maintenance and Quality Assurance scored lowest and may need coaching
- ✗ Only 61% of participants agreed that supervisors handle work issues effectively, suggesting an opportunity for less effective supervisors to learn from their more effective peers

## Employee Development



- ✓ A lot of credit was given to Sample Enterprises for its efforts to promote from within
- ✓ Every item for this dimension showed at least moderate engagement across the company
- ✓ Notable emphasis was placed on the growth and learning opportunities that exist
- ✗ More intentional career mapping may be helpful for retaining staff in HR and Logistics
- ✗ Marketing, Sales, and IT workers appear to indicate that more training opportunities are needed as well as the time to include it in their schedules

## Organizational Culture



- ✓ Several people depict a workplace that is highly positive and encouraging
- ✓ Respect and fair treatment are mentioned frequently as drivers of engagement
- ✓ Most people feel secure in their jobs based on what they have heard from other people
- ✗ Five job groups scored in the low range; a closer look at their culture may be merited
- ✗ Employees with less than 5 years of tenure are more divided in terms of coworkers meeting obligations, suggesting that this could be a driver of turnover
- ✗ There was lower support across groups for the idea that personal needs are supported by the company, making this an area where overall engagement could be improved

## Communication



- ✓ Newer employees give credit to longer-tenured colleagues for answering questions and communicating important processes; continuing to partner these groups is recommended
- ✓ Most people are comfortable sharing their views, which suggests a safe environment
- ✗ More than 1/3 of participants feel they could be better informed of choices affecting them
- ✗ Assemblers and Machinists commented that supervisors send conflicting messages
- ✗ Part-Time employees reference frequently being left out of important discussions
- ✗ There is significant opportunity to improve the quality of communication that occurs between different levels of the organization

# 2019 ENGAGEMENT SURVEY – SAMPLE ENTERPRISES

## Recognition and Appreciation



- ✓ More than 86% of the workforce indicated satisfaction with the employee benefits package
- ✓ The Manager subgroup unanimously agreed that contributions are recognized, indicating there might be best practices that could be identified and applied more broadly
- ✗ About half of respondents disagree that people are paid fairly based on performance
- ✗ Machinists generally feel that pay could better reflect their level of skill
- ✗ Groups and teams may get less formal recognition for success than individuals
- ✗ Members of the Sales team believe that incentives for hitting targets could be better

## Role Definition and Expectations



- ✓ A majority of respondents (73%) believe that expectations of their time are reasonable
- ✗ Open-ended responses suggest some confusion around conflicting work directions, particularly for Engineering jobs
- ✗ Assemblers were the lowest-scoring group on average (32%) in terms of getting the instruction they need to do their work effectively
- ✗ Over half the respondents agree that people could be held more responsible for results

## EXECUTIVE SUMMARY

Employees at Sample Enterprises as a whole most enjoy coming to work because of those they interact with on the job. It appears that colleagues are broadly appreciated for how accepting and helpful they are. Most participants in this survey speak highly of the company and like the type of work they do. Specifically, jobs are challenging but not to the point where they are viewed as overly stress-inducing. Executive leaders and supervisors receive high marks for collaborating constructively with the workforce and being easy to work with. Many believe there are ample opportunities for advancement and appreciate the encouraging culture they work in. From an improvement mindset, making work instructions and rewards as consistent and clear as possible would assist employees in feeling more assured in their jobs and incentivized to succeed. Overcoming barriers to transparency would also create a culture where people could take charge of their own careers and the employee experience in ways that benefit everyone. More attention could be drawn to the achievements of exemplary staff. There could also be some opportunities to provide additional support for employee needs and to foster better communication amongst Part-time staff. Overall, employees of Sample Enterprises enjoy the type of work they do, take pride in where they work, and enjoy the people they work with. These could be important points of leverage throughout the process of building increased levels of employee engagement.

# 2019 ENGAGEMENT SURVEY – SAMPLE ENTERPRISES

## SUGGESTIONS FOR BUILDING ENGAGEMENT

- Align Team on Work Instructions (Communication; Role Definitions and Expectations): Getting staff to be accountable begins with establishing clear standards that then get messaged consistently. Schedule regular checkpoint meetings with management and supervision to achieve alignment around production priorities and applicable work processes. Where consistency is lacking, charge someone with creating standard work and give relevant stakeholders input on the process so they buy into the final framework. Equip people managers with the tools they need to reinforce behaviors that correspond with work instructions while correcting behaviors that do not.
- Promote Transparency (Nature of Work; Executive Leadership; Communication): Ownership of a better workplace begins when employees have a venue where they can offer suggestions. Schedule regular town hall meetings where employees are encouraged to voice their opinions while senior leaders discuss known issues and challenges in an open forum. Demonstrate the value of transparency by acting on reasonable suggestions that are made and drawing attention to these actions in future meetings.
- Recognize Individual Accomplishments (Recognition and Appreciation): The extent to which you recognize effective team performance is admirable but extending this to high-performing individuals could enhance the motivation of some within your company. Develop a system for tracking individual performance metrics if a means of doing so does not yet exist. Provide teams with mechanisms to highlight individual contributors. Prompt supervisors to do the same as a part of their periodic reviews or weekly meetings with staff.
- Develop a Forum for Communicating with Part-Time Employees (Communication): It can be difficult to engage effectively with part-time workers, given their variable schedules. Launch an initiative that strives to build stronger communication with this group. Hold a focus group where you can ask this part of your workforce questions pertaining to what is going well and what could get better communication-wise. Determine the best forum (e.g., e-mail, weekly newsletter, weekly meeting) for keeping this group apprised of important company updates while giving them an opportunity to respond and feel heard.
- Explore and Support Employee Needs (Organizational Culture): Perceptions of employee needs and the extent to which they are being met can sometimes vary greatly amongst employees and top leadership. Compile total compensation statements or a presentation you can give that outlines the various benefits your organization makes available. Conduct focus groups to determine current programs that may not be as valued and implement replacements that align with the most pressing needs employees identify.



LARRY BORODKIN, Ph.D.

SENIOR VICE PRESIDENT

## PROFESSIONAL EXPERIENCE

Dr. Larry Borodkin serves as Senior Vice President for PRADCO. He has over 30 years of experience in the assessment and coaching of executives, managers, and key individual contributors. He has worked extensively with governmental entities in the assessment and training of safety force personnel, and serves as the key contact for PRADCO's large public sector client base. In that capacity, Larry has developed and led command staff coaching programs for police and fire departments. He manages and conducts safety force pre-hire and promotional evaluations for over two hundred departments.

Formerly a Director of Human Resources at one of the country's most effective nonprofit organizations, Larry has contributed his accumulated practical knowledge and insight to helping these organizations face the critical business challenges of the 21st century. He conducts executive evaluations for nonprofit leadership positions, and collaborates with executive directors and board leadership in staff evaluations and development of high-potential performers. As a leadership consultant and coach, Larry contributes significantly to the management and development of our corporate clients.

Larry is active in the *Jewish Federation of Cleveland*, serving as a member of the *Human Resources Development Committee* and the *Security Committee*. In the public safety sector, Larry also contributes his time to the *Cuyahoga County Police Chief's Association* and the *National Organization of Black Law Enforcement Executives (NOBLE)*. Larry serves on the *Training Committee* of NOBLE and has developed and facilitated multiple training sessions for public safety employees.

## AREAS OF INTEREST AND EXPERTISE

- Psychological and work style evaluation for organizational fit
- Safety force and public sector employee assessment and command staff development
- Talent acquisition and development in nonprofit organizations
- Competency modeling and benchmarking
- Attitude survey and performance appraisal development
- Supervisory skills training and small group facilitation

## EDUCATION

Dr. Larry Borodkin earned his B.S. Degree in Combined Science at Youngstown State University. He received his Ph.D. in Industrial/Organizational Psychology at the University of Akron.

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### Corporate Headquarters

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## JOSEPH T. LUBIN, MLRHR

### SENIOR DIRECTOR OF PUBLIC SECTOR BUSINESS UNIT

#### PROFESSIONAL EXPERIENCE

Joe Lubin is currently the Senior Director of Public Sector Business Unit at PRADCO. He has over 20 years of experience in the public sector, mainly in human resources for cities in Northeast Ohio. Throughout his career, he has attained a breadth of experience in all aspects of human resources, including collective bargaining, talent acquisition, selection systems, training programs, benefits, compliance, and policy development. His education and experience contribute to his emphasis on providing solutions that are rooted in strong research evidence.

At PRADCO, Joe draws on his extensive knowledge of human resources to provide solutions to clients across industries. He utilizes his experience designing selection systems to assist organizations in assessing candidates for organizational fit. His skills as a dynamic presenter contribute to his success leading training programs for organizations on a variety of topics. Joe's sincere and approachable style enables others to see him as a valued partner. He has worked with leaders and Human Resources professionals to help them enhance their skills as coaches, interviewers, managers, and leaders.

Joe also provides training, support, and leadership on a regular basis so that clients are aware of our array of services and satisfied with our delivery to meet their employee-related needs. Joe leads by example and is a trusted advisor to people within and outside of PRADCO.

#### AREAS OF INTEREST AND EXPERTISE

- Psychological and work style evaluation for organizational fit
- Safety forces and municipal employees assessment, and leadership development
- Talent acquisition and development across industries
- Executive assessment and coaching
- Training to promote knowledge acquisition and skill attainment
- Human resources strategy, process, and policy development

#### EDUCATION

Joe earned his B.A. in Psychology at Cleveland State University. He went on to receive his M.A. in Labor Relations and Human Resources at Cleveland State University. He is an *International Public Management Association for Human Resources Certified Professional*.

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#### Corporate Headquarters

178 East Washington Street, Chagrin Falls, Ohio 44022  
www.pradco.com | (440) 337-4700

**PRADCO**  
DEVELOPING STRONGER ORGANIZATIONS





BOB BICKMEIER, Ph.D.

DIRECTOR OF RESEARCH & DEVELOPMENT

## PROFESSIONAL EXPERIENCE

As Director of Research & Development, Dr. Bob Bickmeier supports the organization with updated research through his interdisciplinary education in Industrial-Organizational Psychology and Organizational Science. Bob provides recommendations for clients in all industries and fields based on data-driven behavioral assessments. He is passionate about ensuring organizations hire employees that perform and fit well in their roles based on current research and on data specific to each position, organization, and industry.

Bob possesses a strong background in measurement development and validation. He is proficient in quantitative and qualitative research methods and design, data analysis, and best practices related to the workplace. Bob uses his research processes and knowledge to approach organizations with a data-driven perspective and a focus on assessment validation to ensure sound recommendations. He has worked with a variety of organizations to plan and develop new divisions, to design and conduct engagement surveys, and to work with leadership to implement data-driven recommendations.

Bob has presented research at the *Society for Industrial and Organizational Psychology* and the *Southern Management Association*. He has contributed to the *Encyclopedia of Industrial Organizational Psychology*, 2<sup>nd</sup> ed., and he has published white papers covering topics within leadership development.

## AREAS OF INTEREST AND EXPERTISE

- Research-based evaluations for organizational fit
- Employee engagement analysis and consulting
- Leadership assessment and development
- Data analytics and statistical modeling
- Job modeling and assessment validation
- Work identity and job crafting
- Resilience and occupational health
- Safety Forces assessment

## EDUCATION

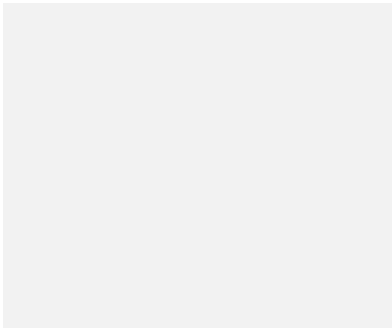
Dr. Bob Bickmeier obtained a B.A. in Psychology from Ohio University. He obtained an M.A. in Industrial-Organizational Psychology and a Ph.D. in Organizational Science from the University of North Carolina at Charlotte.

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**PRADCO**  
DEVELOPING STRONGER ORGANIZATIONS



# CITY OF MT. PLEASANT, MICHIGAN

## ORGANIZATION CLIMATE SURVEY PROPOSAL

Prepared by:

Joseph Lubin  
Senior Director of Public  
Sector Business Unit (PSBU)  
(440) 337-4714

February 18, 2025

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### Corporate Headquarters

178 East Washington Street, Chagrin Falls, Ohio 44022

[www.pradco.com](http://www.pradco.com) | (440) 337-4700

**PRADCO**  
DEVELOPING STRONGER ORGANIZATIONS

# EMPLOYEE ENGAGEMENT SURVEY



For 70 years, PRADCO has helped our clients select, develop, and retain individuals and teams who embody cultural values and achieve organizational goals. Our team is constantly learning the needs of our clients across many industries to tailor cutting-edge solutions that help them hit their goals. It is our objective to become an extension of your team - a trusted partner and advisor that provides insight and guidance. We are also committed to partnering with you in a way that reflects our core values of Integrity, Excellence, Service, Accountability, Adaptability, and Teamwork.

Most organizations realize that better outcomes are achieved with an engaged workforce. Reading the pulse of your workforce is essential to having high-performing teams that achieve today's productivity and quality objectives.

Further, successful organizations understand and learn from their employees and feel that it is important to understand the following:

- What do employees like about the working environment?
- How effectively do supervisors relate to employees?
- What changes would employees like to see to make the organization a better place?

## Overview

No matter what survey option you selected, PRADCO's engagement Surveys are designed to deliver actionable results. Administration is simple and efficient and PRADCO offers advice that helps you get maximum employee participation to ensure robust results. Group breakdowns examine the organization from a variety of perspectives and data graphs and tables are used to illustrate important response patterns. Narrative interpretation of the data can be included from survey experts and recommendations are given for follow-up actions and improvement strategies. Presentations can be made to your leadership and workforce as needed.

## Survey Components

PRADCO will conduct a meeting with your organization to discuss survey goals and determine survey content. The survey will include the following:

- Standard survey of up to twelve (12) content areas, including six (6) multiple-choice items per category.

1. Communication	7. Recognition and Appreciation
2. Employee Development	8. Relationship with Coworkers
3. Executive Leadership	9. Role Definition and Expectations
4. Nature of the Work	10. Supervision
5. Organization Culture	11. Diversity, Equity & Inclusion (optional)
6. Pride in Job	12. Safety (optional)
- Two open-ended questions.
  - What do you like about working here?
  - What would you change?

## Survey Packages/Options

### Quick View™ Engagement Survey

- PRADCO will work directly with you to plan, develop, and administer your survey.
- After the process, PRADCO will ensure you have reports, understand the data, and have an action plan for moving forward.
- Includes a computerized report that features:
  - Overall Engagement Scores, 10-12 dimensions of engagement, and item level responses
  - Two standard open-ended questions regarding your organization's culture
  - Access to breakdown reports and follow-up questions to gain more insight
  - A debrief call where we discuss results and action plan moving forward

### Enhanced View Engagement Survey

- PRADCO will learn about your organization prior to the survey and tailor it to your needs
- Includes a customized report delivered within two weeks of the engagement survey being closed that includes:
  - A comprehensive analysis to provide full understanding of all data
  - A participation breakdown that shows response rates for different groups
  - Key engagement strengths that can be leveraged to promote a positive culture among current and new employees
  - A summary of the current state of employee engagement within your organization
  - Areas/Suggesting to take action in to build engagement overall or within specific areas that can be acted upon right away

## Full View Engagement Survey

- PRADCO measures engagement twice; once at the outset and again after 12-18 months to see where improvement, maintenance, or decline has occurred.
- Provides a computerized report that compares Time 1 and Time 2 data for overall, dimension, and item-level engagement.
- Develops customized reports after both surveys. The report at Time 2 highlights areas of growth and decline as well as updated areas of strength and developmental opportunity.
- Gives customized suggestions for maintaining and enhancing momentum in the areas that matter most to you and your employees.
- Debriefs both surveys with you to assist with interpreting the data and key trends.
- Includes a customized report delivered within two weeks and features:
  - A comprehensive analysis to provide full understanding of all data
  - Participation breakdowns that show levels of participation
  - Strengths to rally around as you focus on building a stronger organization
  - Developmental opportunities that can be addressed
  - A summary of the current state of engagement
  - Suggestions for what you can focus on right away so that your investment in engagement can yield the maximum results
  - The computerized overall and breakdown reports are included as part of this package

## Project Approach

### Survey Administration

- PRADCO will gather information and work with key Mt. Pleasant leaders to design an engagement survey and approach that best meets your needs
- PRADCO will assist the City in developing a complete communication and roll-out strategy, including introductory and follow-up emails.
- Employees will complete the survey (which takes about 20 minutes) after receiving an email from [noreply@pradco.com](mailto:noreply@pradco.com) or by logging in to *welcome.pradco.com* from any internet connection and entering a unique user code
- The survey will be open for the number of days determined by your organization and PRADCO will provide frequent updates to the City regarding completion status

### Analysis and Report Preparation

- PRADCO will compile the data and report the results by Overall Group and three (3) data breakdowns (e.g., location, manager, hourly/salary) determined by your organization
- A summary report will be provided
- PRADCO will meet with key stakeholders to review the report and provide additional input on key drivers of engagement and next steps

## Experience and Qualifications

PRADCO has a long history of conducting engagement surveys for organizations in a variety of industries. Here is a sample list of Public Sector clients who have recently conducted engagement surveys with us:

- City of Gahanna (2024-2025)
  - Ben Nolan, HR Manager, 614.342.4454, [ben.nolan@gahanna.gov](mailto:ben.nolan@gahanna.gov)
- Youngstown Public Library (2023-2024)
  - Elizabeth Repasky, HR Director, 330.744.8636, [lrepasky@libraryvisit.org](mailto:lrepasky@libraryvisit.org)
- Cleveland Metroparks (2023)
  - Harold Harrison, Director of HR, 216.635.3252, [hgh@clevelandmetroparks.com](mailto:hgh@clevelandmetroparks.com)
- City of Powell (2024)
  - SWOT Analysis/Survey
  - Jason Nahvi, HR Manager, 614.885.5380x1050, [jnahvi@cityofpowell.us](mailto:jnahvi@cityofpowell.us)

## Staffing

Dr. Larry Borodkin, Dr. Bob Bickmeier, and Joe Lubin will be assigned to this project and their bios are attached.

## Timeline

- Commencement of Project: Immediately upon approval of contract
- Information Gathering Meeting(s) and Survey Preparation: 1- 2 Weeks
- Survey Administration: 2 Weeks (or more if needed)
- Analysis & Report Preparation: 4 - 6 Weeks
- Optional: Presentation to Leadership Team
- Optional: Action Planning around Results

# PRICING



Description	Quantity	Price
<b>Engagement Survey Package</b>		Quick View: \$ 8,000
Standard survey with 60 items and two open-ended questions (as previously described)		Enhanced: \$12,500
Analysis breakdowns include Gender, Race, Location, Hourly/Salaried		Full View: \$24,000
<b>Additional Options:</b>		
Additional Breakdowns	per breakdown	\$800
Custom Open-Ended Question	per question	\$800
Additional Survey Category	per category	\$800
Employee Engagement Consulting beyond the scope of this proposal	per hour	\$350
Item Customization		Pricing varies
Administering the survey in another language		Pricing varies
Retention Analysis		\$4,000
Presentation to Additional Groups		\$1,800
Engagement Survey Comparison Report		\$2,200

## Travel:

PRADCO's proposal includes meeting with Mt. Pleasant leadership throughout the engagement. We typically handle these meetings virtually. Should Mt. Pleasant want us on site, our on-site fee is \$1,000/trip + the cost expenses (lodging, food, mileage, etc.).

\*Pricing is valid for 30 days from the date of this proposal.

**Total \$**

Thank you for your consideration!



## ABOUT PRADCO



96%

said they are satisfied  
with PRADCO as a  
business partner

97%

said they are satisfied  
with the accuracy of  
PRADCO's assessments

98%

said they would refer  
PRADCO products and  
services to others

### ABOUT US

PRADCO helps develop stronger organizations. We are the talent assessment, development, and management company that focuses on learning our clients' needs so we can partner with them on informed decisions that drive their organizational goals and grow their businesses.

Staffed by management consultants and licensed psychologists, PRADCO offers smart, targeted solutions built around driving your organization's goals forward. We combine research-based practices with cutting-edge technology to support organizations in all areas of talent development.

### OUR MISSION

PRADCO partners with leaders to select, develop, and retain people who fit their cultures and contribute to their organizational goals. We focus on client needs to become an extension of their team, providing insight, objectivity, and accountability.

# Cover Letter

February 19, 2025

Heather Bouck  
City of Mt. Pleasant  
320 W. Broadway  
Mt. Pleasant, MI 48858

## Authorized Representative:

Adam Probolsky, President  
Probolsky Research  
1629 K Street NW Suite 300  
Washington, DC 20006  
[adamp@probolskyresearch.com](mailto:adamp@probolskyresearch.com)  
Telephone: 202-559-0270  
[www.probolskyresearch.com](http://www.probolskyresearch.com)

Heather:

Thank you for the opportunity to offer our services to the City of Mt. Pleasant. We look forward to working with the City to conduct a workplace climate survey among full-time and part-time union and management employees to gather insights about their perceptions of their work environment, their satisfaction with leadership, communication, teamwork, job satisfaction, and overall culture.

We are much more than just research consultants. Dr. Alyce Basil, a workplace communications expert, and I, an organizational leadership expert, will serve as co-project managers. I have held multiple leadership positions within city and county governments, providing me with extensive local government oversight and policy-making experience. Our broader team includes communication, data analytics, economic, organizational leadership, and public policy experts. That's how we go well beyond "the results" and give you the information and tools to implement positive change. We provide context and specific organizational strategies to improve employee communication, relations, and retention.

Having conducted thousands of similar projects nationwide, we have unmatched experience developing, conducting, and analyzing research among public agency employees. We will identify a baseline to use in future research and offer actionable recommendations for next steps toward training, educational programs, and organizational success. Some recent employee engagement research clients include City of Falls Church, City of Modesto, and City of College Park, Town of Bluffton, and the Rural Communities Assistance Corporation. Our understanding of Michigan is reflected in our work with Ottawa County, Macomb County, and Rochester Hills.

While email is the typical mode for conducting employee surveys, we know that not every employee has a city email or regularly accesses it. That's why we offer multiple ways to complete the survey which can include email-to-web, text-to-web, or by calling a live interviewer. And preserving confidentiality is a core value that is never compromised.

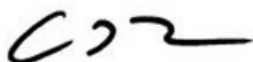
We will offer a Spanish language option - other languages are available. Our disability and diversity advisor will help ensure the research process is sensitive to those with physical disabilities and is fully inclusive.

On a personal note, I hope we get to work together because I am excited to explore Deerfield Nature Park after a meeting at City Hall.

We acknowledge receipt of Addendum No. 1 - updated due date and 2 - Q&A. We pledge to comply with all agreement and insurance requirements. You can count on us to be available, as much as requested for meetings and to make presentations – **in-person or virtually**.

We look forward to working together on this important project and helping build the roadmap to your strategic goals and priorities.

Sincerely,



Adam Probolsky  
President

## Executive Summary

- Thirty-two years of experience
- High familiarity with Michigan and the City's project details
- Woman and minority-owned firm
- Available (on City's schedule) for meetings and presentations
- No charge for travel or meetings
- You will always work directly with our senior team members
- Science-based methodology
- Confidentiality is a core value
- Employee communication and talent development advisory services are included





Employee Research &  
Organizational Change



# City of Mt. Pleasant

## Proposal for: Consultant Services for Workplace Climate Survey

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Prepared for: Heather Bouck, City Clerk

February 19, 2025

# Project Approach

## Project Initiation

We begin every research project by understanding how our client got to this moment in time. Our work will achieve a new baseline of employee sentiments.

You cannot overwhelm us with background information and data. We expect to pore through staff reports, financial reports, past surveys, news clips, and social media posts talking about the City. This is an essential part of our holistic approach to organizational success. There is nothing peripheral about our work. We are passionate about helping cities improve their work climate, employee retention, and satisfaction.

### Goals:

Specifically, we will:

- Design and administer a comprehensive workplace climate survey, accessible to all Mt. Pleasant employees
- Perform individual interviews, such as in the case of extreme dissatisfaction
- Analyze survey responses and prepare a detailed report including key findings, trend analysis, recommendations for change and opportunities discovered, and immediate action items
- Recommend training and education programs based on the research findings
- Provide tools for implementing and tracking progress
- Present detailed findings to the City Commission

## Recommended Research Approach

With our extensive national experience conducting employee surveys, we propose using an approach that ensures easy access for all employees, management, full-time and part-time.

Sending emails and reminder emails is the typical approach to surveying city employees. However, this does not always accomplish the goal of maximizing participation. We know that every agency is different, and we may need to use additional methodologies, including text-to-web, outbound, or inbound telephone interviews or even lunch events where we provide iPads and food to encourage in-the-moment survey completion.

# Employee Engagement Survey Methodology

There is often an emotional connection between employees and their work environment. Our research approach captures this emotion and quantifies it, allowing staff and leaders to better meet the needs of employees and ensures that the City is with emerging trends in the workplace.

It is critical to emphasize the confidential nature of our research and the fact that the research is being performed by an independent third party. We recommend initiating this survey with an e-mail from management to employees explaining the purpose of the research and emphasizing the confidential nature.

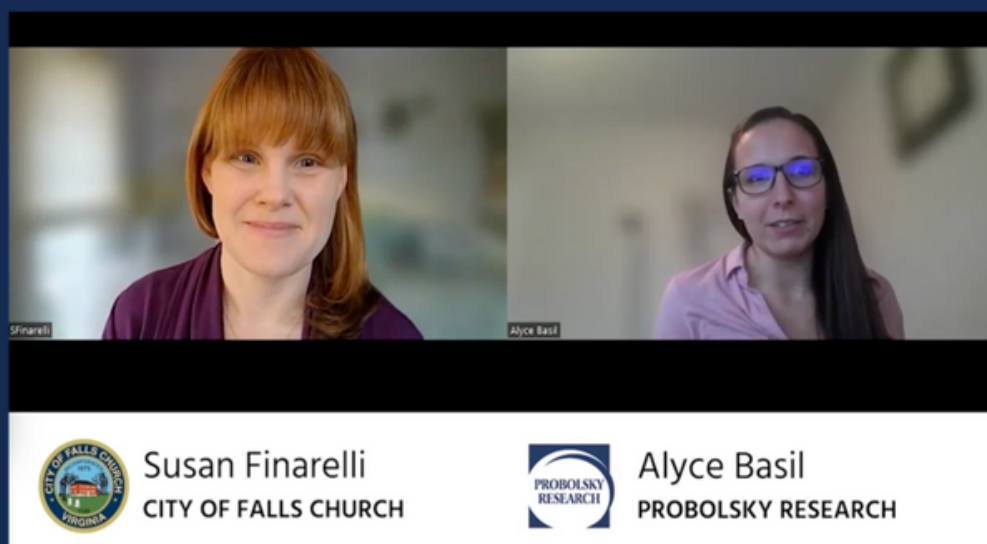
The survey will be conducted largely online via our secure digital platform by sending emails to all staff members. If some staff members do not have an email on file with the City, we can send them a text message with the secure link. If necessary, we can offer the survey by phone as well.

Our online survey platform ensures confidentiality and anonymity, including the online reporting dashboard and post-survey analysis. Only aggregate results will be shared; no individual responses will be identifiable.

We send invitations with a secure link for each employee to access the survey. Our security measures ensure that no one can take the survey more than once. Our online survey platform is easy to use and allows participants to complete the survey from any device: computer, tablet, or mobile phone.

Conducting research in the language most comfortable to respondents is critical in obtaining accurate results in a statistically valid survey. We will include English and Spanish options.

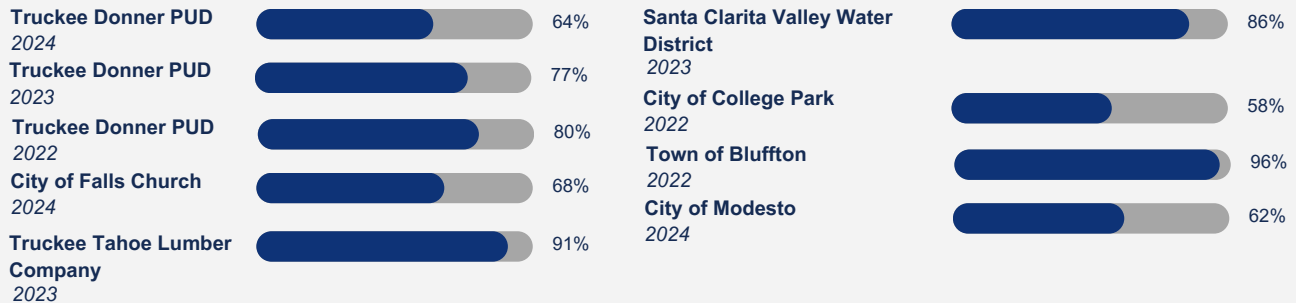
Before beginning the survey, we will record a video with a staff member explaining the goals of the survey to employees and provide assurance about confidentiality. This unique approach increases participation rates among employees by demonstrating the value of their participation. Watch an example video [here](#) or by clicking on the video below.



EXAMPLE: Employee Survey Video (City of Falls Church, VA)

# Probolsky Research Employee Survey Participation Rates

We will make every effort to get 100% participation from Mt. Pleasant's 125 employees. Here are some examples of our success with other organizations.



## Analysis and Reporting

Once our data collection phase is complete, we begin a process of comprehensive data analysis and reporting to deliver accurate, thorough, and actionable data insights to the City.

## Data Analysis

We complete comprehensive statistical analyses of the research results, utilizing software programs, including IBM SPSS and R to conduct statistical testing, such as multiple regression analysis. Both qualitative and quantitative data will be analyzed in a scientifically valid manner. This helps us discover and present statistically significant results – beyond broad opinions – and to understand the specific factors that contribute to the attitudes and beliefs of residents. These analyses are crucial in identifying gaps in public perception and awareness. Once we have run all analyses on results, cross-tabulations are developed, graphics are generated, and other elements of the report are prepared, including:

- **Analyzing** survey responses and preparing a detailed report including key findings, trend analysis, recommendations for change, opportunities discovered, and immediate action items
- **Providing recommendations** for training and education programs based on the findings
- **Sharing** tools and methodologies for implementing and tracking progress

## Qualitative: Verbatim Responses to Open-Ended Questions

For open-ended questions - which can yield qualitative results - we code the responses into categories. Once these categorizations have been quantified, we take our analysis a step further. We analyze the tone and word choices and overlay demographic data for each response. This demographic overlay will provide the City with a thorough understanding of the opinions by age, ethnicity, gender, department, or other factors. Here is an example:





**Female, White/Caucasian, English, Parks**

*Question: What other training would you like to see made available to employees?*

*Answer: Spanish language classes*

# Reporting

Our reporting is comprehensive and immediately usable by decision-makers. Our reporting includes:

-  **1** Survey purpose, methodology, and key findings focused on actionable and usable through charts, tracking data visualization, open-ended question responses, cross tabulations, analysis, conclusions, and recommendations in PowerPoint presentation format
-  **2** Results sent via PDF and hard copy (if requested)
-  **3** Presentations to the key staff, City Commission, and other audiences as directed
-  **4** In-person meetings, presentations, conference calls, and ongoing consulting

## Results Dashboards

Probolsky Research offers interactive results dashboards to display key findings from our research at no additional cost. Each results dashboard is customized to meet the City's needs and goals. Results dashboards allow users to filter data based on specific demographics. You can explore example dashboards by clicking [here](#). Dashboards can be used for internal or external use.



EXAMPLE: Employee survey results dashboard

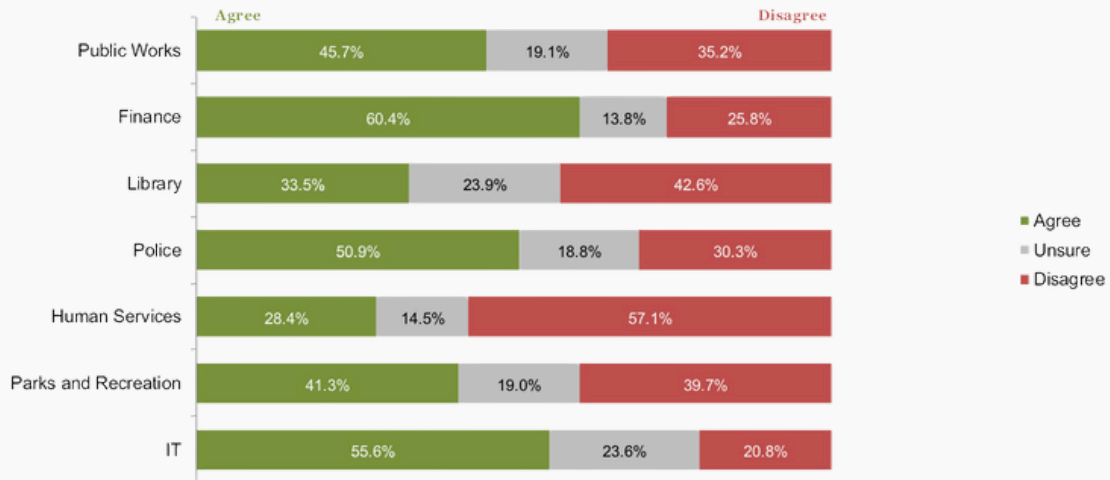


# Cross-tabulations

We will provide demographic and department cross-tabulations. This is where we will discover how opinions vary across employee subgroups.

## Results by department

Question 4: Agree or disagree: I feel valued as an employee.



EXAMPLE: Results segmented by demographics

# Final Reporting, Presentations, and Ongoing Consulting

After completing our reports, we will send our deliverables for feedback and approval. We will incorporate requested changes before finalizing and making presentations to other stakeholders as directed. We are available to present findings virtually or in-person. We also welcome the chance to work with the City staff and outreach consultants or in-house communications team, to ensure the results of our research can be fully utilized. We will make strategy recommendations based on the survey results.

## Accurate Research Must Be Accessible & Inclusive

At our core, we are an organization that celebrates inclusivity because it is the only way to achieve accurate research. Being inclusive of the ways people differ is the best way to ensure that our research reflects the constituency we are researching.

How do we do this?

- Speak to people in their preferred language
- Offer multiple ways to participate in the research
- Ensure the research honors the lived experience of those surveyed
- Convey to participants that their voices will be heard

We want your respondents to know that they are taking an active role in improving their workplace.

## Accessibility Standards

Our online survey platform adheres to the most current accessibility standards, including compliance with the **Web Content Accessibility Guidelines (WCAG) 2.1 AA and Section 508 of the U.S. Rehabilitation Act**. It is designed to be accessible to people with a diverse range of sight, hearing, movement, and cognitive abilities, including users with impairments. Features include screen-reader and keyboard navigation compatibility, responsive survey layouts, high-contrast themes for the visually impaired, and rigorous accessibility testing.

## Cyber Security, Confidentiality, & Certifications

We take data integrity and confidentiality seriously. All client materials are hosted in a secure digital cloud environment. We use 256-bit Advanced Encryption Security to keep your data secure. This is the same level of encryption used by the U.S. Government. Our data are stored on U.S.-based computers. Research is only released per staff's direction.

We will provide the City with a secure, encrypted link to upload all relevant employee data.

We have multiple team members who hold certifications in the protection of human subjects in research from the Collaborative Institutional Training Initiative (CITI). CITI is the leading provider of research ethics and compliance education, utilized by academic, medical, and social science researchers across the United States and globally.



# Experience and Qualifications

Established in 1992 and organized as a Limited Liability Corporation, Probolsky Research LLC specializes in market and opinion research. We are a woman and Latina-owned firm; we are multilingual.

Probolsky Research conducts research in government, business, non-profit, election, and association practice areas. We are traditional market researchers and pollsters who are constantly innovating, without compromising on quality.

While Dr. Adam Probolsky and Dr. Alyce Basil will serve as co-project managers, Dr. Probolsky will serve as the City's point of contact, our entire team, with broad research experience working for workplace climate surveys, will participate in your project.

**You will always work directly with our senior team members, all of whom have advanced research-related degrees and expertise.**

Our active engagement in the Association for Talent Development ensures that we have the latest perspectives on best research and training practices for workplace engagement and training.

## Client Service Philosophy

**We include unlimited meetings and presentation time.** We welcome the chance to meet and make presentations as directed, without limitations.

**We believe in regular and open communication and a collaborative working relationship.** We know that staff is busy, so we limit the need for staff time and make ourselves available on your schedule.

We provide a truly individualized method for your research. We do not believe in a one-size-fits-all approach. All our work will be custom to the City of Mt. Pleasant while drawing on the benefit of our vast employee engagement, organizational leadership, and local government experience.



# References

## **Town of Bluffton (SC)**

We conducted an employee engagement survey for the Town to measure employee sentiments regarding their role for the Town, their superiors, and their overall workplace satisfaction. We are currently conducting another employee survey now.

**Contact: Chris Forster, Assistant Town Manager**

**Address: 20 Bridge Street, Bluffton, SC 29910**

**Telephone: 843-540-7448**

**Email: [cforster@townoffbluffton.com](mailto:cforster@townoffbluffton.com)**

## **City of Falls Church**

We conducted an employee engagement survey for the City of College Park measuring employee sentiment related to their role for the City, their superiors, and their overall workplace satisfaction. Survey results have been used as a management tool. We included trend analysis on all reporting.

**Contact: Cindy Mester, Assistant City Manager**

**Address: 300 Park Avenue, Falls Church, VA 22046**

**Telephone: 703-248-5042**

**Email: [cmester@fallschurchva.gov](mailto:cmester@fallschurchva.gov)**

## **City of College Park**

We conducted an employee engagement survey for the City of College Park measuring employee sentiment related to their role for the City, their superiors, and their overall workplace satisfaction. Survey results have been used as a management tool. We included trend analysis on all reporting.

**Contact: Teresa Way-Pezzuti, Director of Human Resources**

**Address: 8400 Baltimore Avenue #375, College Park, MD 20740**

**Telephone: 240-487-3536**

**Email: [tway@collegeparkmd.gov](mailto:tway@collegeparkmd.gov)**

# Results Confidentiality

We are committed to maintaining the highest standards of confidentiality and data security. Our clients' employee survey data will not be shared with third parties without the client's consent.

To comply with your request for an example of our work, you can access an anonymized results presentation [here](#).



# Experience

We understand how the data we collect and analyze informs the City in decision-making and staff action.

Our results will help the City leadership align programs and initiatives with employee expectations. By engaging the broadest possible cross-section of your employee population, we know the data will reflect the diverse perspectives of all stakeholders.



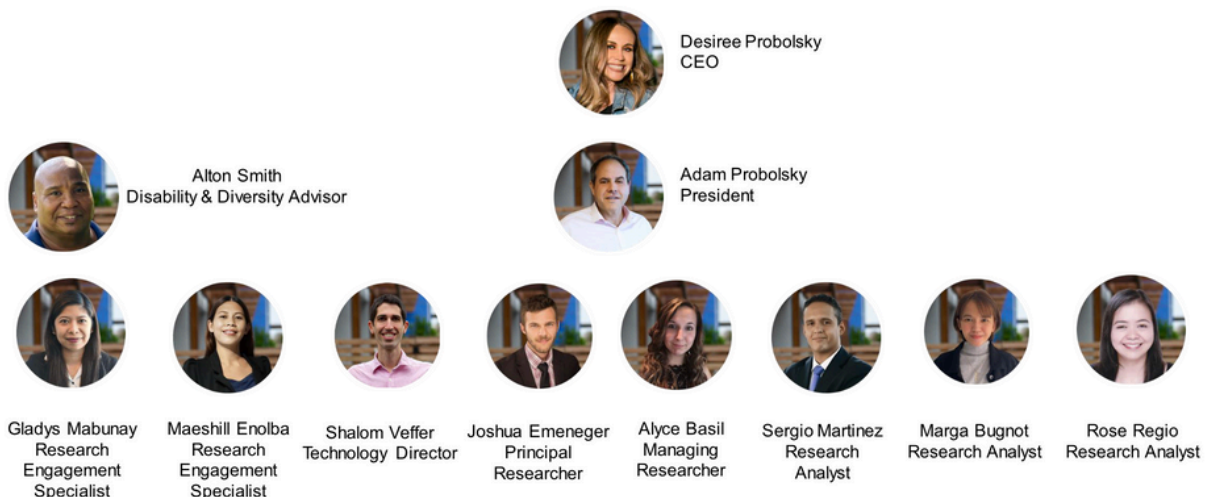
**The best part comes when employees feel acknowledged and heard by their workplace, giving them a sense of ownership and buy-in and enhancing the long-term success of their career and the City's vision and goals.**

We regularly participate in workshops and smaller group meetings to convey survey findings and advise on strategy. We welcome the chance to collaborate closely with staff.

# Staffing

All Probolsky Research team members are cross-trained, and every member of our team will be intimately familiar with the City project details. This ensures continuity, timeliness, and quality of work product.

This organizational chart features our research team and the resumes of our proposed key project team follow.



**We are always available to our clients.** We will continually keep the City informed of progress with meetings and updates. While we recommend a weekly call to ensure the project stays on track, we will accommodate any meeting or call schedule staff requests. At least one project team member at Probolsky Research will be available 24/7 for urgent matters.





## CONTACT

202-559-0270  
[www.probolskyresearch.com](http://www.probolskyresearch.com)  
[adamp@probolskyresearch.com](mailto:adamp@probolskyresearch.com)

## EDUCATION

**South College**  
Doctor of Education, Organizational Leadership

**Maryland Institute College of Art**  
Master of Professional Studies, Data Analytics & Visualization

## PROJECT ROLE

Adam will serve as co-project manager and point of contact for this project.

# Dr. Adam Probolsky

## President

Adam is an organizational leadership and talent development expert specializing in workplace climate, employee engagement, and strategic decision-making for local governments. With 32 years of experience, he has led research initiatives that assess employee sentiment, leadership effectiveness, and workplace culture, providing municipalities with actionable strategies to improve retention, communication, and job satisfaction. As president of Probolsky Research, he ensures that survey methodology, data analysis, and reporting align with best practices for organizational change, using a science-based approach. Adam holds a Doctorate in Organizational Leadership from South College and a Master's in Data Analytics and Visualization from the Maryland Institute College of Art.

## PROFESSIONAL EXPERIENCE

- **Probolsky Research – President (1992-Present)**
  - Leads research and strategy and serves as an advisor to the firm's clients on matters of public policy, legislation, and business strategy
- **Orange County Register – Columnist (freelance) (2008-2012)**
  - Wrote a weekly column in Irvine, CA
- **Orange County Transportation Authority – Member, Environmental Oversight Committee (appointed) (2008-2012)**
  - Oversaw the expenditure of over \$175 million in public transportation funds for the acquisition and restoration of mitigation lands
- **Orange County Waste & Recycling – Commissioner (appointed) (2007-2009)**
  - Advisory role for County's solid waste disposal facilities
- **City of Irvine – Planning & Finance Commissioner (appointed) (2003-2008)**
  - (Planning) Statutory quasi-judicial role, overseeing the City's General Plan and Zoning Code through review and approval of discretionary applications for land use
  - (Finance) Oversaw City's \$200 million General Fund budget, \$100 million in Capital Improvement budget and over \$40 million in reserves
- **Irvine Valley College- Chairman, College Foundation (volunteer) (2001-2007)**
  - Oversaw and awarded hundreds of thousands of dollars in scholarships to students and funding for college police
- **Orange County Sheriff's Department – Spokesperson (volunteer) (2001-2007)**
  - Reserve member serving as public information officer

## CERTIFICATIONS

**Diversity, Equity & Inclusion in the Workplace** – University of South Florida



# Dr. Alyce Basil

## Managing Researcher

Alyce is a workplace communications expert specializing in message development, employee engagement, and organizational strategy. With over eight years of research experience, her work has been published in peer-reviewed journals and presented at national and regional conferences. At Probolsky Research, she leads survey design, data analysis, and focus group moderation. She holds a Ph.D. in Communication from the University of Connecticut, an MA from Bryant University, and a BS in Business Administration from Nichols College.

### CONTACT

202-559-0270  
[www.probolskyresearch.com](http://www.probolskyresearch.com)  
[alyce@probolskyresearch.com](mailto:alyce@probolskyresearch.com)

### EDUCATION

**University of Connecticut**  
Doctor of Philosophy, Communication

**Bryant University**  
Master of Arts, Communication

**Nichols College**  
Bachelor of Science, Business Administration

### PROJECT ROLE

Alyce will serve as co-project manager.

### PROFESSIONAL EXPERIENCE

- **Probolsky Research – Managing Researcher** (2023-Present)
  - Manage quantitative and qualitative research projects including instrument development, moderation, analysis, and reporting
- **Fors Marsh Group – Research Associate** (2021-2023)
  - Developed research projects for large government agencies including designing methodology, data analysis, and reporting
- **University of Connecticut & Bryant University – Independent Researcher/Instructor** (2017-2022)
  - Designed and managed custom independent research projects from conception to publication; instructed courses in the Department of Communication
- **Nichols College – Program Coordinator/Adjunct Instructor** (2017-2021)
  - Developed and managed student and community programming; instructed courses
- **Quinebaug Valley Community College – Adjunct Instructor** (2015-2017)
  - Instructed a diverse population of students

### CERTIFICATIONS

**Diversity, Equity & Inclusion in the Workplace** – University of South Florida





## CONTACT

202-559-0270  
[www.probolskyresearch.com](http://www.probolskyresearch.com)  
[rose@probolskyresearch.com](mailto:rose@probolskyresearch.com)

## EDUCATION

University of the Philippines,  
Diliman  
Bachelor of Science, Statistics

## PROJECT ROLE

Rose will serve as the project research analyst, supporting data analysis and reporting.

# Rose Regio

## Research Analyst

Rose is a data analytics expert with over nine years of experience in quantitative research, specializing in public policy and market analysis. At Probolsky Research, she drives data processing, quality assurance, and report automation for tracking studies. Skilled in statistical analysis and data visualization, she leverages tools like SPSS, R, Excel, Power Query, and Looker Studio to turn complex data into actionable insights.

## PROFESSIONAL EXPERIENCE

- **Probolsky Research – Research Analyst** (2024-Present)
  - Provide assistance to senior researchers in all aspects of research including data analysis and reporting support
- **Freelancer** (2020-2023)
  - Freelance research services such as data collection and processing, analysis, and social media management
- **QBE Insurance – Analytics Lead** (2017-2022)
  - Led a team responsible for data processing, reporting, visualization, and analytics
- **Blackbox Research – Analytics Manager** (2017-2021)
  - Managed a team of analysts handling data extractions, data quality, database management, data processing, reporting, analysis and visualization
- **Concentrix – Quality Analyst** (2009)
  - Instructed a diverse population of students
- **HGS – Assistant Manager** (2007-2008)
  - Led the Management Information Systems team focusing on performance reporting and business analytics
- **IBM – Senior Associate** (2007-2008)
  - Prepared reporting and performance reports to aid in decision-making and capacity planning forecasts

## CERTIFICATIONS

**Data Science and Big Data Analytics: Making Data-Driven Decisions –**  
Massachusetts Institute of Technology Professional Education

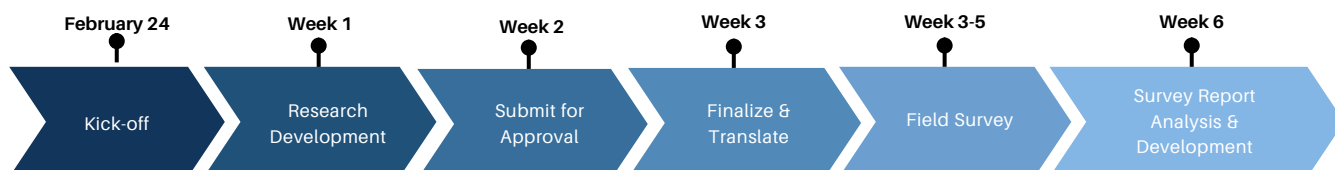
# Cost Proposal

Our pricing is all-inclusive, not-to-exceed. **We do not charge by the hour, for travel, or any other expenses.** We are flexible.

Task	Cost
Kick-off, research and survey development	\$1,500
Conduct survey	\$1,700
Individual follow-up interviews	\$1,250
Reporting, recommendations and ongoing consulting	\$2,900
<b>TOTAL</b>	<b>\$7,350</b>

## Timeline

We can start our work for the City immediately and meet any timeline requested. Below is an example timeline that can be easily shortened or otherwise modified.



- Kick-off meeting
- Collect & analyze background information

- Write survey questionnaire
- Send draft for review & edits

- Submit for approval
- Make requested edits

- Finalize survey
- Translate

- Conduct Survey

- Deliver reporting
- Present results
- Provide in-depth findings
- Make specific recommendations
- Ongoing consulting

Probolsky Research has the necessary capacity to deliver high-quality work. In over thirty years of business, we have never initiated a change order; we have always delivered on time and within budget.





**Proposal for Workplace Climate Survey  
City of Mt. Pleasant**

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**Cover Letter**

Ovell Barbee  
Principal, Ovell Rome and Associates  
[Your Address]  
[info@askovell.com](mailto:info@askovell.com)  
616-856-8660  
February 20, 2025

City of Mt. Pleasant,

I am pleased to submit this proposal on behalf of **Ovell Rome and Associates** to conduct a comprehensive workplace climate survey for the City of Mt. Pleasant. Our firm specializes in **employee engagement, workplace culture transformation, and data-driven organizational assessments**, making us uniquely positioned to deliver insights and actionable recommendations that foster a thriving work environment.

With extensive experience in assessing and enhancing workplace culture, our firm has successfully led similar projects, including engagements with the **Grand Rapids Chamber of Commerce**, where we conducted a full-scale organizational climate study, and **Omaha Public Power District (OPPD)**, where we designed and facilitated targeted focus groups to address identified disparities in employee satisfaction. These initiatives resulted in tailored strategies that helped improve workforce morale, communication, and leadership engagement.

For this project, I will personally serve as the **Lead Consultant**, bringing my expertise as a former CHRO and DEI executive, ensuring a **strategic and impactful approach** to the survey, data analysis, and recommendations. **Trina Poston**, our **Project Manager and Facilitator**, will provide structured coordination, ensuring seamless execution, effective engagement with stakeholders, and clear communication throughout the process.

Our approach combines **quantitative and qualitative methodologies**, ensuring that every employee's voice is heard through **a well-designed survey, focus groups, and follow-up interviews**. This blended strategy allows us to not only assess current perceptions but also uncover underlying factors influencing the organizational climate. Our final deliverables will include a **detailed analysis, actionable recommendations, and a roadmap for sustaining a positive workplace culture**.

We are excited about the opportunity to partner with the City of Mt. Pleasant on this important initiative. Our goal is to provide **clear, strategic insights that lead to meaningful improvements**, fostering a work environment where employees feel valued, engaged, and empowered. We welcome the opportunity to discuss our approach further and look forward to collaborating on this impactful initiative.

Thank you for your time and consideration. We look forward to your response and the opportunity to make a lasting difference.

Sincerely,

**Ovell Barbee**

Principal, Ovell Rome and Associates

Website: [www.askovell.com](http://www.askovell.com) | Email: [info@askovell.com](mailto:info@askovell.com) | Phone: 616-856-8660

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## Firm Background & Experience

**Ovell Rome and Associates (Ask Ovell)** is a nationally recognized consulting firm specializing in Human Resources strategy, organizational culture, and workplace climate assessments. Led by **Ovell Barbee**, a distinguished HR executive with extensive experience in workforce engagement and DEI initiatives, the firm has successfully conducted employee surveys and focus groups for various organizations, leading to actionable recommendations that drive workplace improvements.

## Relevant Experience

- **Grand Rapids Chamber of Commerce:** Conducted organization-wide interviews, assessed workplace culture, and provided recommendations for improvement.
  - **Omaha Public Power District (OPPD):** Developed survey questions and led a climate study for employees whose survey results indicated disparities, using a focus group approach to develop targeted solutions.
  - **Other Projects:** Extensive corporate experience conducting employee engagement studies, DEI assessments, and leadership training programs for various organizations.
- 

## Project Team

### Ovell Barbee (Lead Consultant)

Ovell Barbee is the Principal and Founder of Ovell Rome and Associates. A former CHRO and DEI executive, Ovell has worked across multiple industries, leading initiatives that drive workforce engagement and organizational culture transformation. With expertise in employee engagement, climate assessments, and leadership development, he has designed and implemented workplace surveys and focus group methodologies that have led to improved retention, employee satisfaction, and cultural alignment. His experience with the **Grand Rapids Chamber** and **OPPD** highlights his ability to provide actionable recommendations that drive meaningful change.

### Trina Poston (Project Manager & Facilitator)

Trina Poston is an experienced project manager and facilitator specializing in organizational assessments and workforce engagement strategies. She has a background in **program implementation, stakeholder communication, and data-driven decision-making**, ensuring projects are executed with precision and clarity. Trina will oversee project logistics, facilitate focus groups, and manage communication with Mt. Pleasant stakeholders to ensure smooth execution.

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## Project Approach

### 1. Survey Design & Administration

- Develop a comprehensive, confidential workplace climate survey to assess employees' perceptions of leadership, communication, teamwork, job satisfaction, and overall culture.
- Customize questions based on Mt. Pleasant's organizational structure and goals.
- Ensure accessibility for all employees, offering digital and paper survey options if needed.

### 2. Data Collection & Analysis

- Utilize a mixed-method approach combining quantitative survey data with qualitative insights from focus groups.
- Perform targeted follow-up interviews with select employees to provide deeper context.
- Analyze findings and identify key themes, trends, and potential areas for improvement.

### 3. Focus Group Discussions

- Conduct focus groups to gain deeper insights into employee experiences.
- Encourage open dialogue about workplace challenges and strengths.
- Use the focus group findings to supplement and validate survey data.

### 4. Reporting & Recommendations

- Develop a detailed report summarizing findings, trends, and actionable recommendations.
- Include suggested training programs or policy enhancements to address identified issues.
- Provide Mt. Pleasant with tools for tracking progress and measuring long-term impact.
- Present key findings to the City Commission while maintaining employee confidentiality.

### 5. Project Timeline

- **Week 1-2:** Survey development and approval.
- **Week 3-4:** Survey distribution and data collection.
- **Week 5-6:** Conduct focus groups and follow-up interviews.
- **Week 7-8:** Data analysis and report preparation.
- **Week 9:** Presentation of findings and recommendations to the City Commission.

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## Cost Proposal

### Proposed Fee: \$30,000 (Fixed-Fee Model)

#### Scope of Services Covered:

The total project fee of **\$30,000** includes the following comprehensive services:

1. **Project Planning & Kickoff** – Initial meetings, strategy alignment, and survey framework development.

2. **Survey Design & Administration** – Development of customized survey questions, administration, and response tracking.
3. **Focus Groups & Interviews** – Conducting structured discussions to gain qualitative insights into workplace culture.
4. **Data Analysis & Reporting** – Aggregating survey results, qualitative findings, and developing a strategic report.
5. **Presentation to City Commission** – Delivery of final findings with recommendations for workplace enhancements.
6. **Project Management & Stakeholder Communication** – Ensuring seamless execution, reporting progress, and maintaining engagement with City of Mt. Pleasant leadership.

## Justification for Pricing

- The proposed fee reflects a combination of **quantitative and qualitative data collection methods**, ensuring that Mt. Pleasant receives a well-rounded assessment.
- **Benchmarking with industry standards** for executive-level HR consulting projects, ensuring best practices are applied.
- **Comprehensive scope includes both survey & focus groups**, which provides deeper insights beyond just numerical data.

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## Conclusion

Ovell Rome and Associates is well-equipped to conduct a thorough workplace climate survey that will provide the City of Mt. Pleasant with meaningful insights and actionable strategies. We look forward to the opportunity to partner on this important initiative.

The Utech Group  
1537 American Court  
De Pere, WI 54115  
ATT: Melissa Borowicz

City Clerk  
320 W Broadway  
Mt. Pleasant, MI 48858  
clerk@mt-pleasant.org

**Project Name: Consultant Services for Workplace Climate Survey**

To Whom it May Concern,

We are pleased to submit our proposal in response to the City of Mt. Pleasant's RFP for Consultant Services for Workplace Climate Survey. The Utech Group, with its people analytics division, illumyx, is eager to bring our expertise and experience to support the City of Mt. Pleasant in its strategic initiatives to enhance the employee experience and the workplace climate.

The Utech Group, a Wisconsin-based consulting firm, specializes in helping organizations navigate the complexities of change and transition. Through our analytics division, illumyx, we leverage best-in-class, science-backed surveys and assessments to provide actionable insights for individuals, teams, and entire organizations. Our expertise spans culture, employee engagement, organizational alignment and integration, team development, and leadership development. For over three decades, we have partnered with organizations across various industries and of all sizes, from 10 to 10,000 employees, empowering leaders to make data-driven people decisions that drive high levels of employee participation, satisfaction, and organizational success.

Thank you for the opportunity to bid on this project. We have the staff, resources, and expertise to achieve your objectives by the end of 2025 and look forward to partnering with you.

Sincerely,

Melissa Borowicz  
CEO  
[Melissa@utechod.com](mailto:Melissa@utechod.com)  
920-915-7740



**Proposal For**  
**City of Mt. Pleasant**  
**Project Name: Consultant Services for Workplace Climate Survey**

Submitted by:



**The Utech Group**  
1537 American Ct.  
De Pere, WI 54115

Contact: Melissa Borowicz, CEO  
melissa@utechod.com  
(920) 915-7740

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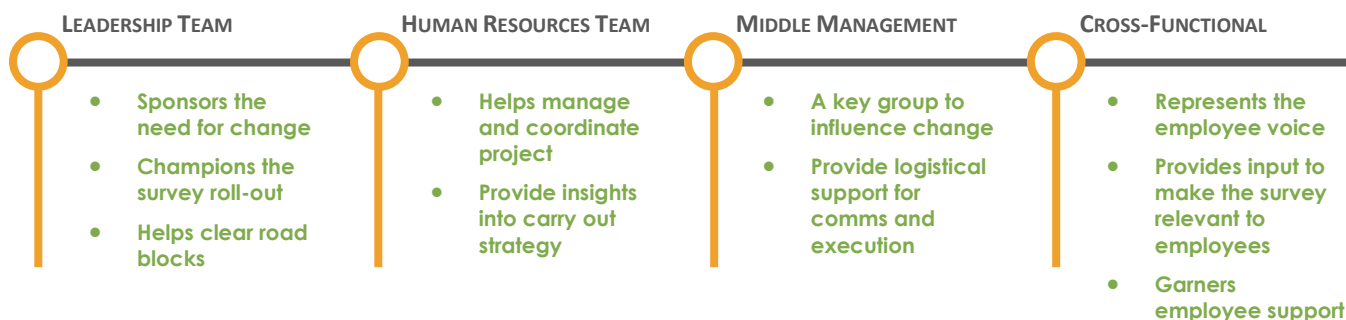
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## 1. Project Approach & Methodology

The Utech Group offers a survey and assessment process focused on science-backed and research-driven survey design and efficient customization that illuminates the unique story of each organization we work with. Applied throughout our three-phased approach, our survey methodology is designed to ensure not only the collection of insightful and actionable data, but also to foster a culture of continuous improvement and engagement across all levels of the organization. We understand that the success of a culture and engagement survey extends far beyond the collection of data; it involves a strategic process that:

### a. Leverages a Network of Teams for Improved Employee Buy-in

You will need the buy-in of teams across the organization to help implement an effective survey, carry out the action plan, and instill lasting change in their areas of influence. Where possible, a participative approach, focused on co-creation, yields stronger survey reliability and consistently high survey participation. For many projects, we engage the following groups to support communication and custom survey development:



### b. Ensures Validity and Reliability of Data

Validity and reliability are terms often thrown around when discussing data. In short, validity measures accuracy, or if your metrics truly and accurately represent what you say they do. Reliability measures precision, or the degree to which your metrics are consistent and minimize random error. If you want to get better data, you must start at the earliest stages of the project: designing your survey.

The purpose of a survey is to learn more about the employee experience and make informed decisions. Confusing or misleading survey results can jeopardize the progress of your goals and lead you to focus on the wrong things.

There are many ways to assess both validity and reliability, but here we focus on content validity, face validity, and internally consistent reliability.

- Content validity assesses whether the content of your survey is fully representative of what you are trying to understand and measure. We co-create our surveys in conjunction with HR and a cross-functional employee group. When time allows, interviews and focus groups can be utilized to further tailor our understanding of the unique traits and experiences within an organization. We begin with broad questions and then delve into topics as they arise. This process helps clarify how organizational values, behaviors, and norms are lived and experienced. We then select from our database of over 900 questions to build a survey draft that best represents what was uncovered in the discovery process.

- Face validity determines if the survey is relevant and understandable to the people taking it. The HR Team and Survey Team work closely with us to review each survey statement to determine its relevancy to the organization and employee population. In this process, new survey statements may be created to best capture the employee experience. Our consultancy team helps to ensure that any new survey statements developed are properly worded.
- Reliability and internal consistency is an analysis step crucial to the integrity of the survey process. This involves ensuring that the survey produces stable and consistent results across different segments of the employee population. To achieve this, we employ statistical techniques to measure the internal consistency of each custom survey we deploy. This helps us determine if different parts of the survey are reliably measuring the same concept or if different parts of the organization are facing a diversity of issues that are not consistent.

### c. Upholds Confidentiality and Data Security

Our approach emphasizes data accuracy AND employee confidentiality. We start by uploading an employee census that includes demographic and contact information for each employee. We use this to generate a unique ID and unique survey link for survey participants. When an employee completes their survey, their survey link cannot be used again. This prevents duplicate responses and ensures that reporting groups (location and department) are accurate. To ensure confidentiality, we aggregate data into groups of five or more employees. If there are less than five employees in a department or group, then that employee data will be aggregated into the next and most appropriate largest population group. For example, if there are only 3 employees in an HR department, we will not generate a report for the HR department; however, we will include the 3 HR employees in a larger report for the broader Administrative Department.

We also decouple employee email addresses from employee survey responses in our database to provide another layer of confidentiality. The surveying organization does not have access to individual responses within the database. Raw data can be provided upon request, but steps are taken to ensure that employee names cannot be tied back to survey responses.

Survey data is stored in US-based data centers and database access is restricted to illumyx data scientists. Our database servers are secured and routinely monitored. Data is encrypted in transit and at rest.

### Conclusion

Our culture and climate surveys are carefully designed to assess the current cultural landscape and employee sentiment at your organization. To accomplish this, we apply our proven three-phase approach and thoughtful methodologies for accurate and actionable results. Our efficient customization process also includes tailored action ideas for every question in the survey. This survey will enhance your culture, climate, and engagement initiatives and serve as a catalyst for driving meaningful improvements across the organization. Ultimately, this collaboration aims to provide insights that are transformed into actionable strategies, fostering a more engaged, satisfied, and committed organization, while ensuring alignment with the actual needs and aspirations of your workforce.

## 2. Relevant Experience with References and Participation Rates

We work across a range of industries, including public sector organizations. The following are key projects and references where our methodology resulted in valid and reliable survey constructs and high employee survey response rates.

### Project 1:

Name: Employee Survey and Culture Improvement Project  
Organization: Bay Area Air Quality Management District (BAAQMD)  
Reference: Rex Sanders, Former Chief Administrative Officer  
Address: 375 Beale St #600, San Francisco, CA 94105  
Contact: (510) 260-7276 / rex@thehive.consulting  
Dates: 2020-2021  
Headcount: 400 employees  
Survey Response Rate: 86%  
Services: The Agency powered by the methodology of the Utech Group, planned and executed a change management strategy that engaged leaders from all levels of the organization; conducted interviews and focus groups to both build leadership & employee buy-in while also collecting qualitative data to build a custom Culture & Engagement Survey; generated an Executive Summary and led report out sessions for Deputies and Directors; created reports for BAAQMD as an agency and for each division; and conducted follow-up focus groups with all divisions and compiled feedback for suggested actions for the employee-led Culture Advisory Team.  
  
Status: Completed

### Project 2:

Name: Culture & Values Measurement  
Organization: The City of Neenah  
Reference: Mayor Jane B. Lang  
Address: 211 Walnut St., Neenah, WI 54957  
Contact: 920-866-6109 / jlang@neenahwi.gov  
Dates: 2023 - Present  
Headcount: 260 employees  
Survey Response Rate: 85%  
Services: The Utech Group partnered with the City of Neenah to create a customized culture survey to help them establish a baseline measure of employee engagement while also helping the organization clarify and measure their organizational values.

- Conducted interviews and focus groups across all departments to identify values themes and strengths of the culture
- Created a customized survey in collaboration with a cross-functional employee group to measure the most important aspects of the culture

- Reviewed survey results and analysis with employee groups and leaders to finalize the organizational values
- Disseminated results and reports to leaders for action planning

Status:

Completed

### Project 3:

Name: Culture Measurement & Improvement Project  
Organization: Ritter Communication  
Reference: Danny Smith, Vice President of Human Resources  
Address: 2400 Ritter Dr, Jonesboro, AR 72401  
Contact: [danny.smith@rittercommunications.com](mailto:danny.smith@rittercommunications.com)  
Dates: 2015-Present  
Headcount: 400 employees  
Survey Response Rate: 2017: 81%, 2019: 78%, 2021: 79%, 2023: 82%  
Services: Regional telecommunications company that underwent a leadership and management change in 2014 and 2015. Morale was low among employees and the culture was described as “fear-based.” The new CEO was tasked with leading the company in a new strategic vision and shifting the culture of the organization to a more empowered model. Key deliverables included:

- Develop and align an internal Culture Committee (made up of cross-functional employees from leadership and non-leadership positions, tasked with driving culture change) on strategies to root out and address the fear within the culture
- Measure the impact of actions with the illumyx Culture Illumination Assessment
- Develop continued actions to drive ongoing improvements

#### Observed results:

- Demonstrated a 41% improvement in employee commitment levels from 2015 to 2017. Other factors that improved during that same period:
  - Communication Effectiveness: 21% improvement
  - Teamwork: 46% improvement
  - Role Clarity: 36% improvement
  - Leadership Effectiveness: 32% improvement
- New, ongoing strategies were developed, focusing on improving accountability and cross-functional collaboration & communication throughout the organization
- Organization has maintained a workplace of choice status since 2019 (eNPS at or above 40)

Status:

Ongoing

### 3. Project Team Qualification & Staffing

The Utech Group’s survey and analytics department is led by Steve Utech and Dan Ritter who together bring over 20 years of combined experience developing customized organizational survey measures as well as leading organizational improvement initiatives. Our firm has demonstrated its ability to handle complex organizational challenges through our team members’ past projects with non-profit and public entities, as well as with our private sector clients. We carefully choose methodologies, software, and analytical tools to provide innovative, efficient solutions customized for each client. The extensive experience and knowledge of Utech and Ritter are pivotal in our ability to manage and adapt to diverse project needs.

	Primary Role	Location
<b>Stephen Utech</b> Director of Innovation & Strategy, Lead Consultant	<ul style="list-style-type: none"> <li>• Strategy and project advisement</li> <li>• Analysis advisement</li> <li>• Survey design facilitation</li> <li>• Results Presentations</li> </ul>	Onsite and Remote support as needed
<b>Dan Ritter</b> Director of People Analytics	<ul style="list-style-type: none"> <li>• Data analysis and reporting</li> <li>• Results presentations</li> <li>• Analysis and report generation</li> <li>• Survey validity and reliability analysis</li> </ul>	Onsite and Remote support as needed
<b>Max Kresch</b> Sr. Data Scientist	<ul style="list-style-type: none"> <li>• Data analysis and reporting</li> <li>• Analysis advisement</li> <li>• Survey design support</li> </ul>	Remote support as needed
<b>Emily Limberg</b> Business and Strategy Consultant, Lead for Action Planning Support	<ul style="list-style-type: none"> <li>• Results presentations</li> <li>• Follow-up interviews</li> <li>• Align leaders on focus areas</li> <li>• Build custom action tracker</li> <li>• Drive alignment and agreement on action steps</li> <li>• Follow-up and create accountability for progress</li> </ul>	On-site and remote support
<b>Kristy Krautkramer</b> Business Specialist and Qualitative Researcher	<ul style="list-style-type: none"> <li>• Budget management</li> <li>• Support qualitative analysis of survey comments</li> <li>• Internal project management support</li> </ul>	Remote support

## **Project Team's Summary of Experiences**

### **Stephen Utech, MSW**

#### **Project Advisor, Director of Innovation and Strategy**

An experienced leader in the areas of culture optimization, talent management, and organizational effectiveness, Steve Utech is the visionary and founder of illumyx, now the analytics division of the Utech Group. His desire to combine data-driven behavioral science with a robust analytics platform led to the development of a wide range of individual, team, and organizational assessments, fulfilling his goal of giving companies a way to objectively measure and improve their workplace culture. Steve's background in both the hard sciences and the art of family dynamics allows him to take a behavioral and systematic approach to organizational change and transformation. He has worked with Fortune 1000 organizations and executives in a variety of sectors to help them optimize their culture and achieve results. Steve holds a Master of Social Work from the University of Denver in Colorado.

### **Dan Ritter**

#### **Data Scientist, Director of People Analytics**

Dan Ritter is the Director of People Analytics for the Utech Group. He has oversight for the operational delivery of all analytics and assessment products and services. Dan works closely with clients to use data to illustrate the employee experience and assess workplace culture. Using his passion for exploration and awareness, he helps others understand how teams get work done and how to optimize organizational culture. Prior to joining the Utech Group, Dan was a logistics manager who led operations from last place rankings to top of class. He attributes this success to a combination of metric-based performance analysis and intentionally cultivating a workplace experience that emphasized autonomy and positivity. Dan holds a Bachelor of Arts in Education from the University of Wisconsin – Milwaukee. He has a certificate in Data Science from IBM and is currently pursuing his Master's Degree in Data Science from the University of Colorado – Boulder. He has extensive experience building survey constructs for the government sector.

### **Max Kresch, PhD**

#### **Senior Data Scientist, Sr. Data Scientist at illumyx**

Max is an altruistic, creative problem solver who is highly disciplined in his approach to research. He brings an advanced mathematics background to the Utech Group with significant experience in machine learning techniques, computer programming, and complex statistical analysis. Max has experience working on complex Department of Defense projects and he recently transitioned his career into social science research. A regular lecturer on data science at the University of Wisconsin Green Bay, Max is gifted at communicating complex topics in easy-to-understand ways. Max assists the team in survey analysis and reporting and provides oversight on research design and analysis.

### **Emily Limberg, SHRM-SCP**

Emily is passionate about helping leaders and teams recognize their potential and understand the impact of their individual fingerprint on the company. She has worked with organizations across the United States in the areas of talent development, employee engagement, and change management. Throughout her professional career, the



teams she has led and been a part of have focused on measuring corporate culture, improving workplace communication, and enhancing inclusive leadership. Emily has more than 15 years of experience in human resources, program management, operations, and general management.

### **Kristy Krautkramer, M.A.**

Kristy is a highly organized, strategic thinker and planner. She helps bring focus and levity to illumyx. Committed and caring are two words that describe her best and she has endless energy to support projects and causes she believes in. Her background in music, teaching, and finance brings greater efficiency and harmony to processes and team interactions.

Kristy leads operations for the analytics division of The Utech Group, specializing in administrative functions that include finance, HR, and employee onboarding. Her love for order and accuracy frequently finds her leading qualitative analysis projects. A former educator, Kristy has a Master's Degree in Education from St. Norbert College.

### **Other Offerings**

The Utech Group offers a wide range of assessments and services to support an organization with employee development, hiring & promotions, team development, and organizational alignment. Below are summaries of two relevant offerings that can be utilized by The Utech Group to support action planning.

#### *Behavior & Personality Insights*

The Utech Group offers personality assessments to support organizations in the employee development process. The assessments utilize the Big Five model of personality, the most widely researched personality assessment, to provide accurate insights into individual personality and work performance traits. The information can be used to support employee development, make more informed hiring and promotion decisions, as well as for team development and design.

#### *Team Insights*

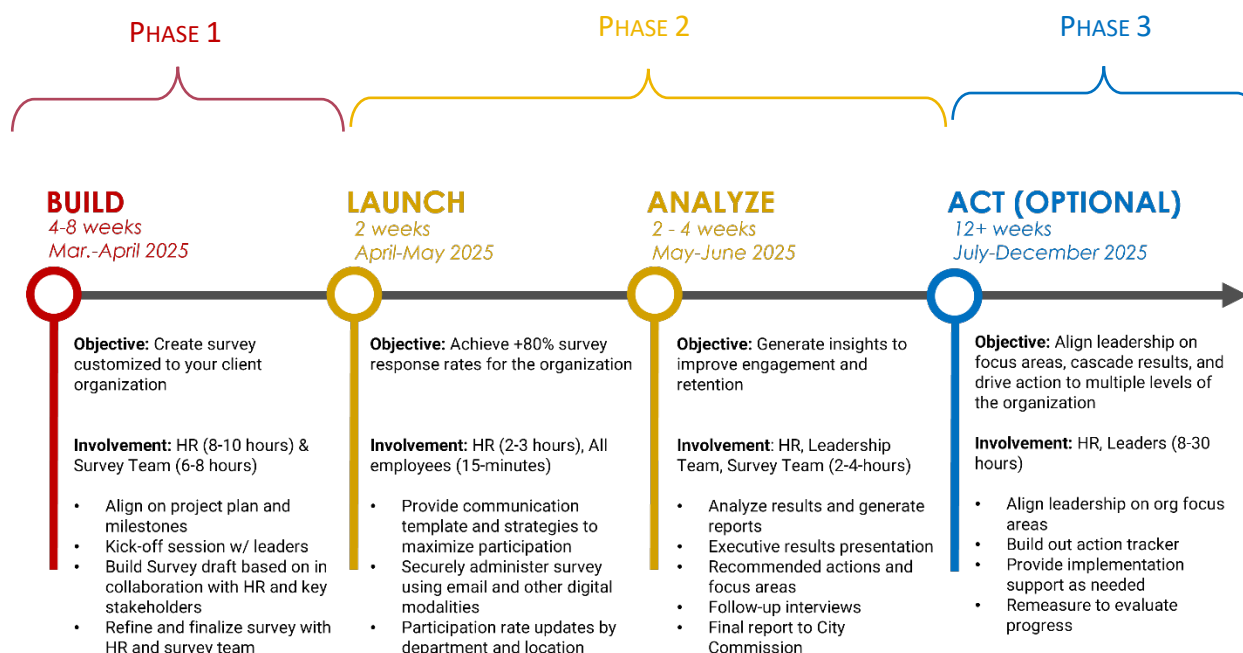
Team Insights gives leaders a visual way of understanding how teams work and function so they can make informed decisions on how to get the most out of their team. The visual nature of the assessment makes it easy for leaders to identify key contributors, high potential employees, areas of team stress, and also those at risk of leaving. The Team Insights assessment tool can also be deployed across departments to improve department-to-department collaboration.

## 4. Project Plan and Timeline

The Utech Group understands that every organization's employee engagement journey is unique. Some organizations are just beginning and require a more comprehensive approach to support, while others are more established and need better data and fine-tuning to gain even more insights into their people and engagement.

### Culture & Workplace Climate Survey

We offer a science-backed and collaborative approach to employee engagement and development to ensure we measure the right aspects of your culture. We offer a three-phase approach to culture transformation. Each phase of our process is highly tailored to reflect the structure, dynamics, and logistics of your organization. *We anticipate a 10–12-week timeline.*



## PHASE 1 - BUILD

The **Build** phase is crucial to understanding your organization. During this phase, we work closely with key stakeholders to design the right tools to measure and diagnose your current culture and climate and set the vision for where you want to go. The following are the elements for the Build phase:

### SERVICES

- **1.1 Survey Planning** - Communication and alignment are essential to the success of your culture and engagement initiative. For the project rollout, illumyx provides:
  - Discuss project goals, process, and organizational landscape
  - Create a project management plan with schedule milestones, responsibilities, and deliverables to achieve project outcomes
    - Establish regular meetings with HR to coordinate project deliverables
  - Develop a communication plan to keep staff and leaders informed about the project's purpose and anticipated outcomes
    - Utilize Survey Communication Plan Guide, which includes:
      - Recommended best practices
      - Email templates
      - Leader FAQs to ensure supervisors are equipped to answer common employee questions about participation
      - Optional posters, infographics, or short promotional videos
  - Recommend forming a cross-functional survey team to work with the Utech Group and HR to consolidate and refine the final culture and climate survey
    - The survey team can also play an important role in helping to communicate the survey to peers
    - Guide HR on survey team participant selection
  - Recommend utilizing project kick-off sessions to educate and align key stakeholders on project goals, an overview of the process, and the role they play in maximizing participation
    - Three groups: Senior leadership, middle managers, and a cross-functional survey team
- **1.2 Survey Design/Creation** – We utilize a data-driven and research-based approach to project and survey design to ensure any survey customization achieves high standards for validity and reliability. The discovery portion of the project includes:
  - Thorough review of your strategic plan, organizational values, organization chart, previous engagement and culture surveys and initiatives, and other relevant materials
  - Ensure that the design is valid and statistically sound according to best practices with questions that are based on proven research
  - Allow for the City of Mt. Pleasant to collaborate on, edit or add questions
    - Meet w/ HR and/or cross-functional survey team to align the survey themes and topics to measure
    - Build an initial survey draft including past questions and recommended questions from our database of over 900 valid and reliable survey questions

- Refine the survey with HR and/or cross-functional survey team over 2-4 meetings, including identifying open-ended questions
  - Unlimited customized questions
- Provide senior leadership the opportunity for final sign-off of survey draft
- Advise the City of Mt. Pleasant on creating a survey that is easy for employees to complete and allows for the efficient delivery of results
  - Customized survey themes to fit your organization's language and values
  - Time testing to ensure the survey is appropriate in length
  - Readability testing to ensure the survey is understandable for the target audience. As a rule of thumb, our survey questions are tailored to an eighth grade reading level or lower.

## PHASE 2 – LAUNCH & ANALYZE

The **Launch & Analyze** phase uses analytics to uncover your story of your culture and workplace climate. Understanding where you are now is critical for planning where you want to go. The key deliverable is a strong baseline measurement from which to make improvements. The components of the Launch & Analyze phase include:

### SERVICES

- **2.1 Survey Administration** – Once approved by the City of Mt. Pleasant stakeholders, the survey is deployed electronically (and physically, if needed) and data is typically gathered over a period of 2 weeks. Key deliverables for deployment:
  - Implement electronic survey with data stored in secure Azure server to ensure confidentiality
  - Customizable email template with participation instructions
  - Survey deployed using unique links to individual emails or SMS text messages
  - Regular participation reports, broken out by demographics of your choice, ensuring participation goals are achieved
  - Ongoing support for strategizing to increase participation rates over 80% (average participation rates range from 70-90% depending on industry)
  - Provide support to answer questions and support respondents
  - Close survey upon Senior Leadership's approval
- **2.2 Survey Analysis & Reporting** – We specialize in making meaning out of your data, identifying the actionable behaviors and insights that have the strongest impact on culture, climate, and engagement. Key deliverables for Survey Analysis & Reporting:
  - Summarize results, identify department and themes, and interpret survey results and provide recommendations to improve culture and climate
  - Executive presentation in PowerPoint. Results are shared virtually (or in person) with the Leadership Team, and other stakeholders. Results include:
    - Culture Score (eNPS) rating and theme scores for chosen survey topics
    - Assessment of where your organization falls in its developmental life cycle
    - Group comparison heat maps of engagement themes to quickly identify areas of opportunity

- Trends over time for select questions
- Internal and external benchmarks where possible
  - External benchmarks against public sector organizations of similar size
- Recommended next steps and actions for improvement
- Generate flexible PDF reports for the organization, departments, roles, and other demographics. Report design is customizable, confidential, and commonly includes:
  - Culture score rating (eNPS)
  - Participation rate
  - Internal and external benchmarks where possible
  - Culture and engagement theme scores
  - Favorability ratings for each theme and its corresponding survey statements
  - Signature strengths
  - Opportunities for improvement that include suggested action ideas for leaders
  - Action Conversation Guide to help leaders discuss their reports with their teams
- Provide additional analysis and reporting as needed
- Provide virtual training sessions to walk managers through survey results portal as well as educate them on how to utilize Action Conversation Guide
  - Clarify their role as facilitators and coaches when discussing results
  - Clarify key talking points to address when discussing results
- **2.3 Follow-up Interviews & Final Report** – We specialize in making meaning out of your data, identifying the actionable behaviors and insights that have the strongest impact on culture, climate, and engagement. Key deliverables for Survey Analysis & Reporting:
  - Conduct 10-15 follow-up interviews with individuals and/or small groups to add further context around strengths and challenges identified from the survey, including fleshing out potential solutions and action steps.
  - Summarize findings from survey and follow-up interviews into a final report for the City Commission

### PHASE 3 – ACT (QUOTE AVAILABLE UPON REQUEST)

During the **Act** phase, we give organizations the options for additional support with aligning focus areas and executing next steps. Utilizing a structured and easy-to-implement framework, our culture and engagement experts assist leaders in developing an integrated strategy to optimize employee engagement and organizational performance. Ongoing check-ins, training, and support sessions are available with your consultants to ensure accountability and progress.

The scope of this phase of work can vary significantly based on the organization's needs and resources. It is recommended to form an internal action planning team who know the organization's existing systems and processes. It's important to work within the existing organizational structures to support action planning to improve engagement and speed of action.

## SERVICES

- **3.1 Post-Survey Action Planning** – Driving change can sometimes feel like a daunting task. Illumyx’ experts are there every step of the way, providing your leaders with ongoing coaching, guidance, and solution development to help manage change and navigate even the toughest cultural challenges.
  - Establish Future Goals
    - Onsite session(s) with key leaders to align organizational focus areas
    - Prioritize future goals and objectives based on potential impact and complexity, ensuring alignment to the organization’s purpose.
  - Coordinate and Take Action
    - Build a customized action tracker
      - Establish clear action items with an organized manageable approach that can merge into the day-to-day operations, through continued feedback, progress update and collaboration. This will allow for shared ownership of progress and impact.
    - Define Roles and Responsibilities
- Form clear roles and responsibilities, actionable items, and accountability is vital. Building a cadence that integrates into the daily operations where the responsibilities are shared throughout the organization.
  - Commit to Communication Methods and Timing
    - Create a consistent framework for updating an organizational tracker that can be communicated with multiple levels of the organization
    - Define the audience, rotation and report-out structure to make the most efficient use of everyone’s time.
    - Implement regular updates that expand beyond the leadership team.
  - Identify Progress Milestones
    - Incorporate milestones into the Action Tracker while monitoring progress towards overall goals
    - Define what progress towards the overall goal looks like
    - Celebrate when milestones are achieved
  - Conduct Regular Check-ins
    - The Employee Engagement Survey Action Plan is a living document. Before handing off the customized tool, we set up 30-day, 90-day, and 180-day check points (customizable) to allow for necessary adjustments while taking a moment to get out of the details of the actions and evaluate overall plan effectiveness for the organization.

## 5. Summary of Fees for City of Mt. Pleasant Culture & Climate Survey

<b>BUILD PHASE (YEAR 1 ONLY)</b>	<b>Total</b>
<b>1.1 Survey Planning</b> <ul style="list-style-type: none"> <li>- Detailed project plan</li> <li>- Stakeholder kick-off session</li> <li>- Communication templates &amp; FAQ's</li> </ul>	
<b>1.2 Survey Design/Creation</b> <ul style="list-style-type: none"> <li>- Build Survey draft based on project goals/objectives with HR &amp; Survey Team</li> <li>- Finalize survey and prepare for deployment</li> </ul>	
<b>TOTAL FEES FOR BUILD</b>	<b>\$5,700</b>

<b>ANALYZE**</b>	
<b>2.1 Survey Administration</b> <ul style="list-style-type: none"> <li>- Regular participation updates/reports</li> <li>- Support to increase participation rates as needed</li> </ul>	
<b>2.2 Survey Analysis &amp; Reporting</b> <ul style="list-style-type: none"> <li>- Analyze drivers of engagement</li> <li>- Executive Team presentation</li> <li>- PDF reports for departments and managers</li> </ul>	
<b>2.2 Survey Analysis &amp; Reporting</b> <ul style="list-style-type: none"> <li>- Conduct 10-15 follow-up interviews</li> <li>- Summarize survey and interview findings into report for City Commission</li> </ul>	
<b>ESTIMATED FEES FOR ANALYZE</b>	<b>\$19,175</b>

<b>ACT (QUOTE AVAILABLE UPON REQUEST)</b>	
<b>3.1 Post Survey Action Planning**</b> <ul style="list-style-type: none"> <li>- Align leadership on focus areas</li> <li>- Brainstorm and prioritize top ideas</li> <li>- Create action plans and follow up on progress monthly</li> </ul>	
<b>3.2 Travel*</b> <ul style="list-style-type: none"> <li>- Estimated 4 onsite visits for action planning support</li> </ul>	
<b>ESTIMATED FEES FOR ACT</b>	<b>TBD</b>

<b>PROJECT FEES EXCLUDING OPTIONAL "ACT" PHASE</b>	<b>\$24,875</b>
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\*Project is quoted assuming that all work will be completed virtually. Consultant(s) can travel to perform work onsite at the City's request. Travel fees billed at cost and can be estimated at \$1400 per trip per consultant using current average airfare costs and federal per diem rates for food and lodging

\*\* If a follow-up survey is requested for 2026, the fee for a follow-up survey for 125 employees is billed as a fixed fee of \$10,565. This is only for survey deployment and analysis and does not include any follow-up interviews or action planning support.

### Fee Schedule

Fees for the Build and Analyze phases will be billed at the start of each phase. Fees for the Act phase are estimated and, if a formal quote is requested, will be billed hourly based on work completed.

## 6. Sample of Work

As part of our proposal, we are including three distinct samples of work products that exemplify the depth and breadth of our analytical capabilities and the insights we can provide. These samples represent a snapshot of the types of analyses and reports we can generate, offering valuable perspectives on employee sentiment, value alignment, areas of strength and opportunity within an organization, among others. Each sample is tailored to provide specific insights, illustrating our comprehensive approach to understanding and enhancing organizational culture and employee engagement.

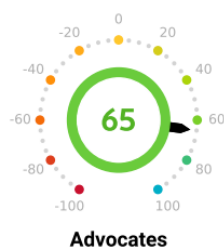
### • Sample 1: eNPS Score Analyses and Theme Scores

- This sample showcases an analysis of the Employee Net Promoter Score (eNPS), a crucial metric in assessing employee loyalty and satisfaction. The report includes both the overall eNPS score over a specified time period and theme scores segmented by organizational values. Additionally, it features data on participation rates, offering insights into employee engagement with the survey process itself. This analysis is instrumental in understanding how employees perceive their workplace and how this perception evolves over time.

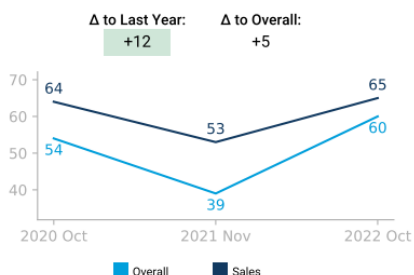
#### Overall Summary

##### Culture Score

Range: -100 to +100

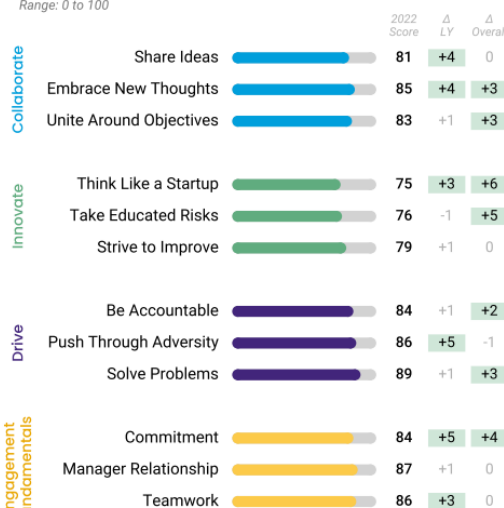


- A very strong score.
- Indicates a high level of engagement.
- 12-point increase since last survey.



##### Values

Range: 0 to 100



##### Participation Rate



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## • Sample 2: Value or Theme-Specific Score Breakdown

- As a deep dive into Sample 1, in this sample we delve into a detailed score breakdown for one of the organization's core values or themes (e.g., Collaborate) and its elements (e.g., Share Ideas, Embrace New Thoughts, and Unite Around Objectives). The report provides scores ranging from 1 (lowest score) to 6 (highest score) for several aspects within 3 sub-values or sub-themes, offering a nuanced view of how well the organization embodies this particular value. This granular analysis helps in pinpointing specific areas within a value that are well-embraced by the organization or need further attention, guiding targeted improvements.



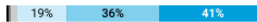


### Overall Summary

#### Collaborate

##### Share Ideas

**81**  $\Delta$  LY +4  $\Delta$  Overall 0






- Received favorable ratings.

Survey Statement	Response Distribution	2022 Score	$\Delta$ LY	$\Delta$ Overall
I feel included in company and team communications.		5.47	n/a	+0.10
I have access to tools and resources to effectively collaborate with my peers.		5.36	+0.10	+0.09
I know how to effectively utilize the collaboration tools made available to me.		5.12	+0.11	-0.07
I know whom to reach out to for specific knowledge and expertise when solving problems.		4.77	+0.10	+0.01
Information is openly shared cross-functionally.		4.64	+0.15	+0.09

##### Embrace New Thoughts

**85**  $\Delta$  LY +4  $\Delta$  Overall +3





- Higher score than Overall.
- All aspects received favorable scores.

Survey Statement	Response Distribution	2022 Score	$\Delta$ LY	$\Delta$ Overall
People on my team embrace the views of others.		5.52	+0.15	+0.05
I feel like I can be my full, authentic self at work.		5.34	n/a	+0.22
I feel seen, respected, and heard during meetings and interactions at work.		5.32	n/a	+0.06
I feel heard when sharing my thoughts and ideas.		5.16	+0.09	+0.06
I do not feel a strong sense of belonging.*		2.20	+0.25	+0.32

##### Unite Around Objectives

**83**  $\Delta$  LY +1  $\Delta$  Overall +3

- Higher score than Overall.
- All aspects received favorable scores.
- One item changed significantly since the previous survey.

Survey Statement	Response Distribution	2022 Score	$\Delta$ LY	$\Delta$ Overall
Leaders regularly share the long-term strategy with employees.		5.20	+0.02	+0.11
I hear enough communication from the leadership team about what is happening.		5.20	+0.16	+0.11
I hear a consistent view of priorities from leadership.		5.17	0.00	+0.08
I feel a personal connection to the shared vision and purpose.		5.08	n/a	+0.34

**Bold text indicates a question had a strong correlation to the Culture Score.**

\* Denotes reverse-coded question, meaning disagreement is considered favorable.  $\Delta$  values reflect reversal.

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## • Sample 3: Strengths and Opportunities Analysis

- This sample presents a detailed analysis, driven by a proprietary algorithm, identifying the key strengths and areas of opportunity for improvement within an organization for the organizational value or theme studied in Sample 2. The report goes beyond numerical data, offering rich descriptions and insights into what the organization is doing well and where it can enhance its practices. This type of analysis is vital for actionable insights, as it helps in recognizing and leveraging strengths while addressing areas that require development.

### Overall Summary

#### Signature Strengths

These areas were rated favorably and had a strong correlation to the Culture Score. Leverage your strengths to address your weaknesses.

##### Engagement Fundamentals

###### Manager Follow-Through

96% agreed their manager keeps commitments.

A culture where managers follow through on commitments shows you that the characteristics of trust, accountability, and reliability are taken seriously at this organization.

###### Focused Priorities

95% agreed their leader keeps the group focused on priorities.

When managers prioritize tasks and activities for their teams it keeps the group focused on continual growth and improvement toward team, departmental, or company goals. This ensures the group is focused on the details of the tasks, enabling the manager to keep focus on the bigger picture strategy and plan.

##### Collaborate

###### Inclusive Communication

94% agreed they feel included in communications.

Effective internal communications improves employee awareness of what is happening in their team and organization. It helps build stronger relationships between employees and leadership, while also improving morale and efficiency. The more context employees have related to their work, the easier it is for them to anticipate and execute.

###### Embrace Others' Views

97% agreed people embrace views of others.

Team members who embrace the views of others are more likely to take in new and valuable perspectives that drive greater diversity of thought. This is a hallmark of a learning culture.

#### Action Areas

These areas have been selected for one or more of the following reasons: unfavorable responses, significant decreases since the last survey, and/or strong correlations.

##### Innovate

###### Root Out Complacency

91% agreed the organization challenges the status quo.

To keep up with growth requires consistent evaluation of day-to-day processes and modes of operating.

- Look for ways to recognize when someone challenges the way things are done
- Seek out different ways to create efficiencies in day-to-day work

###### Innovation Capacity

85% agreed people are given opportunity to innovate.

When resources or capacity are limited, short-term thinking is reinforced and innovation opportunities are constrained. As an organization grows, innovation needs more structure.

- Understand what innovation means to each team member
- Identify barriers to allocating time and resources to innovation
- Continue to identify additional constraints that are getting in the way of innovation

###### Supervisor Involvement

86% agreed their leader is involved in their development.

A supervisor or manager plays a critical role in employee development. Employees have to own their development, but a manager that is curious and committed to an employee's growth helps drive accountability and progress.

- Meet with your direct reports to identify their professional development interests and goals
- Help them brainstorm ideas and opportunities for professional development
- Have them document this into a professional development plan and commit to reviewing progress at least quarterly



Nate Geinzer

Founder/CEO

Double Haul Solutions

nate@doublehaulsolutions.com

doublehaulsolutions.com

February 10, 2025

City of Mt. Pleasant  
Attn: Heather Bouck, City Clerk  
320 W. Broadway  
Mt. Pleasant, MI 48858

RE: City of Mt. Pleasant Workplace Climate Survey,

Double Haul Solutions (DHS) is pleased to offer the attached proposal for Workplace Climate Consulting. DHS is a local government consultancy built by local government professionals and community builders. Our goal is to create genuine relationships with our clients and provide solutions that last. DHS will invest the time and effort to execute a comprehensive, informed, and strategic project scope by municipal consultants who have "done the work."

Your project will be led by April Lynch, Organizational Development & Executive Leadership Coach. April has specialized in municipal human resources and organizational development for over three decades. Supporting April will be the nationally trusted community research non-profit Cobalt Community Research. Cobalt will be leading the development and deployment of the Workplace Climate Survey with guidance from April. April will also have access to the entire DHS team as needed throughout the project to ensure we have the resources to deliver an exceptional product and service.

DHS is confident that the city will be well served by our competitive and high value service offering. Please do not hesitate to reach out with any questions about DHS' proposal as the city reviews its options. We truly appreciate the City of Mt. Pleasant's consideration, and we look forward to working with the community once again.

Yours in Service,

A handwritten signature in blue ink, appearing to read "Nate Geinzer", is written over a blue circular stamp or seal.

Nate Geinzer  
248-207-5293



# DOUBLE HAUL SOLUTIONS

*“Great leadership is in our nature.”*

## HOW WE SERVE

-  Community Engagement
-  Strategic Planning
-  Organizational Development
-  Project & Program Support
-  Economic Development

## OUR STORY

Since 2005, Nate Geinzer has been committed to advancing communities through thoughtful leadership and a deep understanding of public service. His experience, spanning chief executive roles to supporting management positions, has been defined by fostering meaningful connections and delivering practical, innovative solutions tailored to the unique challenges of local government.

In 2021, Double Haul Solutions (DHS) was established with a clear vision: to cultivate thriving communities through strategic collaboration and forward-thinking approaches. DHS is built on the principles of trust, innovation, and alignment with a focus on delivering sustainable and purpose-driven results. We take pride in equipping communities with the tools, strategies, and leadership needed to achieve their long-term goals, whether through strategic planning, economic development initiatives, or interim management support.

With decades of collective experience, our team approaches each project with professionalism, expertise, and a shared dedication to excellence. At DHS, we help communities and organizations reach further by aligning their goals with actionable strategies, fostering meaningful relationships, and overcoming obstacles to progress. Recognizing that every community is unique, we craft tailored solutions that address distinct challenges while driving sustainable growth and operational efficiency. Together, we can navigate complexities, build stronger foundations, and create resilient, vibrant communities.

## OUR VISION

Creating Thriving, Purpose-Driven Communities, Organizations, and Teams.

## OUR MISSION

Helping clients reach further and cut through the winds of everyday challenges.

A Definitive Decision.

## WHY CHOOSE US



Prioritizing partnerships with authentic leaders who share our vision, purpose, and values of creating better communities for the future is paramount to us. Going above and beyond is in our team's DNA and essential to sustainable long-term progress. Double Haul Solutions can tailor its project teams to your unique needs and requirements.



# MEET OUR CORE TEAM

*Helping communities reach further.*

NATE GEINZER



Founder & CEO;  
Community Leadership  
Specialist

APRIL LYNCH



DHS Partner;  
Organizational Development &  
Executive Leadership Coach

MITCH FOSTER



DHS Partner;  
Economic Vitality & Small  
Community Specialist

PETER CHAPMAN



DHS Partner;  
Community-Led  
Development Specialist

TORRI MATHES



DHS Partner;  
Communications &  
Engagement Specialist

TERESA GILLOTTI



DHS Collaborator;  
Community Development &  
Engagement Specialist

ZACHARY SZYMANSKI



DHS Collaborator;  
System Operations &  
Management Analyst

AMANDA OPALEWSKI



DHS Collaborator;  
Management & Engagement  
Analyst



## CONSULTANT PROFILE

### APRIL M. LYNCH

April launched her local government career in 1996 taking detours, twists, and turns into local government leadership roles, with her latest position as a Deputy County Executive for Oakland County, the second largest County in Michigan. April's passion for community building starts with a strong, willing, innovative, and driven organization that values diversity, equity, and inclusion for each and every resident they serve.

#### YEARS EXPERIENCE

30

#### EDUCATION

MASTER OF BUSINESS-  
HUMAN RESOURCES-  
BAKER COLLEGE

BACHELOR OF  
SCIENCE,  
COMMUNICATIONS-  
GRAND VALLEY STATE  
UNIVERSITY

#### SPECIAL EXPERTISE

ORGANIZATIONAL  
EXCELLENCE

LEADERSHIP  
COACHING

DIVERSITY, EQUITY,  
AND INCLUSION

ENGAGEMENT/  
FACILITATION

BUDGET  
MANAGEMENT &  
DEVELOPMENT

STRATEGIC PLANNING

#### Relevant Experience:

- Deputy County Executive, Oakland County
- City Manager, City of Ferndale
- Assistant City Manager/HR Director, City of Ypsilanti
- Assistant to City Manager/HR Director, City of Grand Haven
- Lecturer for Oakland University – MPA for Local Government

#### Relevant Expertise:

- Extensive experience in leading small and large teams
- Prioritizing and managing community input and involvement in multiple master plans, strategic planning processes, as well as, budget development and prioritization
- Leading communities in environmentally sustainable planning for both the organization and the community
- Creating and delivering training on multiple topics for Organizations
- Process improvement and efficiency modeling
- Facilitation of organization-wide staff, leadership, and elected official retreats

#### Relevant Certifications:

- Feilding Institute-Coaching Certification in Executive Leadership
- DiversityFirst Certification, National Diversity Council
- Urban Sustainability Directors Network – Diversity Foundations
- Human Resources Certification Institute – Diversity Certification
- SHRM-SPHR (Senior Professional in Human Resources)

A Definitive Decision.

## WHY CHOOSE US



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www.doublehaulsolutions.com



@doublehaulsolutions



248-207-5293



# EXECUTIVE COACHING SERVICES

## What Executive Coaching Is & What It Is Not

Executive coaching is a professional development strategy that helps executives and other executive-level employees improve their leadership and management performance. Coaches are an extension of talent development with the goal of helping individuals improve self-awareness, emotional intelligence, and the capacity to influence others.

Executive coaches do not aim to fix individuals, as that process begins with yourself. Executive coaching differs from counseling, therapy, or consulting because its purpose is to serve as a career accelerator, helping you enhance your problem-solving abilities, envision bigger goals, and cultivate a stronger presence within your organization.

---

## April's Approach to Coaching Local Government Professionals

My executive coaching philosophy is anchored in the belief that leadership within the public sector is not just about managing resources but transforming them. With over two decades of experience in various leadership roles, I am dedicated to helping leaders harness their potential to effect substantial, positive changes in their organizations and communities. My own leadership was immensely shaped by an executive coach during my tenure with Michigan Municipal Executive (MME), an experience so transformative that it inspired me to guide other municipal executives on a similar path.

My coaching approach is highly personalized and interactive, ensuring that each coaching session is unique to the individual and their needs. I employ a blend of theoretical knowledge and practical insights, drawing on my experience as an executive in the public sector, as well as, an academic background in both organizational development and executive coaching.

For many, executive coaching is part of their mental wellness. For me, coaching is about providing a level of support that nurtures your growth every step of the way and helps you navigate the complexities of public service with confidence and foresight.





**YEARS EXPERIENCE**  
11

**EDUCATION**  
WAYNE STATE UNIVERSITY:  
MASTER OF PUBLIC  
ADMINISTRATION,  
HUMAN & FISCAL RESOURCE  
MANAGEMENT

OAKLAND UNIVERSITY:  
BACHELOR OF ARTS,  
JOURNALISM &  
BROADCASTING

**SPECIAL EXPERTISE**  
STRATEGIC  
COMMUNICATIONS

CRISIS COMMUNICATIONS

COMMUNITY ENGAGEMENT

MEDIA RELATIONS

DIGITAL MARKETING

INTERNAL  
COMMUNICATIONS

BRAND RESEARCH &  
MANAGEMENT

SOCIAL MEDIA MARKETING

## CONSULTANT PROFILE

### TORRI MATHES

Torri Mathes is an accomplished communications professional with a decade of hands-on experience in digital marketing, public relations, community engagement, and management across municipal and nonprofit landscapes. Her expertise lies in guiding, streamlining, and executing strategic communication initiatives. Torri's focus is to empower organizations with effective communication strategies and build stronger audience relationships through transparent communication, collaboration, and community connections. With a Master of Public Administration and a Bachelor of Arts in Journalism, coupled with certifications in emergency management and DEI, Torri brings a unique blend of expertise to the table, ensuring that organizations not only communicate effectively but also resonate deeply with their constituents.

#### Relevant Consulting Experience:

- Michigan Sustainable Business Forum – Communications and Media Relations Lead
- YouthTank Detroit – Strategic Planning and Communication Facilitation
- City of Brighton – Communication and Engagement Facilitation, Downtown Project Stakeholder Analysis, Strategic Communication Services
- Double Haul Solutions - Communications and Design Lead
  - City of Port Huron, Communication and Engagement Support
  - Traverse City DDA, Stakeholder Facilitation, Design Services
- Donor Synergy Consulting – Nonprofit Content Strategist Lead
  - Strategic Communications, Digital Marketing, and Social Media Management
- Web Content Management and Development
  - Donor Synergy Consulting, Elite Trauma Clean-Up, and Link Collective Inc.
- Ferndale Women's Affirmations Group – Strategic Planning and Communication Facilitation

#### Relevant Work Experience:

- City of Troy – Director of Communications and Engagement
  - Internal Communication Improvements
  - Communication Department Restructuring
  - City-wide Community Engagement Strategy Development
- City of Berkley – Director of Communications
  - Internal Communication Lead
  - Strategic Communication Development and Implementation, including Crisis Communications
  - Brand Development, Implementation, and Management
  - Community Engagement and Facilitation
  - Media Relations Management
- City of Auburn Hills – Media Communications Specialist
- Media Genesis – Senior Marketing Project Manager

A Definitive Decision.

**WHY CHOOSE US**



Prioritizing partnerships with authentic leaders who share our vision, purpose, and values of creating better communities for the future is paramount to us. Going above and beyond is in our team's DNA and essential to sustainable long-term progress. Double Haul Solutions can tailor its project teams to your unique needs and requirements.



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@doublehaulsolutions



248-207-5293



# STRATEGIC COMMUNICATION SERVICES

## What Strategic Communications Is & What It Is Not

Strategic communications is about more than just delivering information; it's about creating meaningful connections and driving action. It's a deliberate approach to understanding your audience, crafting messages that resonate, and engaging them in ways that foster trust and clarity.

Effective strategic communication shapes perceptions and guides outcomes with intention. It's not just about pushing out content or reacting to the latest trend—it's about having a long-term vision and ensuring every message aligns with your goals and values. What it's not is scattered or disconnected—it's never just a one-way street or a one-size-fits-all approach.

## Torri's Strategy for Connecting Government and Community

When it comes to bridging the gap between governments and communities, my focus is on building trust and fostering real connections. I believe in communication that listens just as much as it informs.

My approach is centered on creating genuine connections that build trust and engagement within the community. Government communications should be more than just transactional. Communications should be about empowering people with the information they need, in a way that feels accessible and transparent. I help government organizations not just communicate, but connect—ensuring policies and initiatives don't just stay in the abstract but are grounded in the real needs and lives of the people. Listening is just as important as informing, and by building open channels for feedback, we can tailor communications that reflect the community's true needs and create meaningful dialogue.

This approach ensures that communication is a two-way street, leading to more responsive, sustainable solutions while fostering a sense of partnership rather than separation.





**YEARS EXPERIENCE**  
20

**EDUCATION**  
MASTER OF PUBLIC  
ADMINISTRATION -  
EASTERN MICHIGAN  
UNIVERSITY

BACHELOR OF  
SCIENCE, HISTORY &  
SOCIAL SCIENCES -  
EASTERN MICHIGAN  
UNIVERSITY

**SPECIAL EXPERTISE**  
STRATEGIC  
LEADERSHIP

COMMUNITY  
BUILDING

ENGAGEMENT/  
FACILITATION

ECONOMIC  
DEVELOPMENT

VISIONING

STRATEGIC ALIGNMENT +  
PLANNING

BUDGET STRATEGY

## CONSULTANT PROFILE

### NATE GEINZER

Nate began his local government career in 2005, inspired by a deep commitment to understanding the unique needs of communities and fostering collaboration to drive meaningful progress. As the founder of Double Haul Solutions, he has dedicated his career to helping governments build stronger relationships, align their strategies, and overcome challenges to achieve their goals. Nate's approach is rooted in listening to diverse voices, facilitating understanding, and creating cohesive environments where elected leaders and appointed staff can work together effectively.

With experience partnering with communities like Traverse City, Berkley, Northville, Lexington, Tecumseh, and DeWitt Charter Township, Nate has demonstrated success in strategic planning, interim management, economic development, and organizational leadership. His work focuses on cutting through challenges—whether they stem from misalignment, inefficiency, or broken relationships—and creating a foundation of trust, accountability, and shared purpose.

#### Relevant Consulting Work:

- Baker Tilly – Municipal Support Services
- City of Berkley, MI – Interim City Management Services
- DeWitt Charter Township, MI – Township Manager Search
- Village of Dundee, MI – Village Manager Search
- Downtown Ferndale, MI – Strategic Facilitation
- City of Ionia, MI – Community Development Facilitation
- Village of Lexington, MI – Team-Based Village Management Services
- City of Mount Clemens, MI – Facilitation of Multi-Year Strategic Plan Update
- City of Northville, MI – Strategic Project Prioritization Planning, Special Projects, and Grant Assistance
- City of Port Huron, MI – Community Building & Engagement, Facilitation, Economic Development, Strategic Planning, Technical Assistance, and Advocacy
- City of Royal Oak, MI – City Manager Executive Search
- Saline Area Fire Authority – Strategic Facilitation
- City of Tecumseh, MI – Staff Retreat Facilitation, Team Building
- City of Traverse City, MI – Interim City Management Services
- City of Traverse City DDA – Executive Director Search

#### Relevant Work Experience:

- Oakland University MPA Program – Lecturer: Local Government Management
- City of Northville – Interim Housing Director
- City of Brighton – City Manager
- City of Farmington Hills – Assistant to the City Manager

A Definitive Decision.

## WHY CHOOSE US



Prioritizing partnerships with authentic leaders who share our vision, purpose, and values of creating better communities for the future is paramount to us. Going above and beyond is in our team's DNA and essential to sustainable long-term progress. Double Haul Solutions can tailor its project teams to your unique needs and requirements.





# COMMUNITY LEADERSHIP SERVICES

## What Community Leadership Is & What It Is Not

True community leadership is about fostering connections, building trust, and guiding teams toward a shared vision. It's about understanding the unique needs of a community and facilitating collaboration to achieve long-term success. Effective leaders inspire others to contribute their best efforts, ensuring decisions are rooted in the collective interests of the community rather than individual gain. Leadership requires accountability, adaptability, and a commitment to strategic planning, creating a foundation for sustainable and prosperous growth.

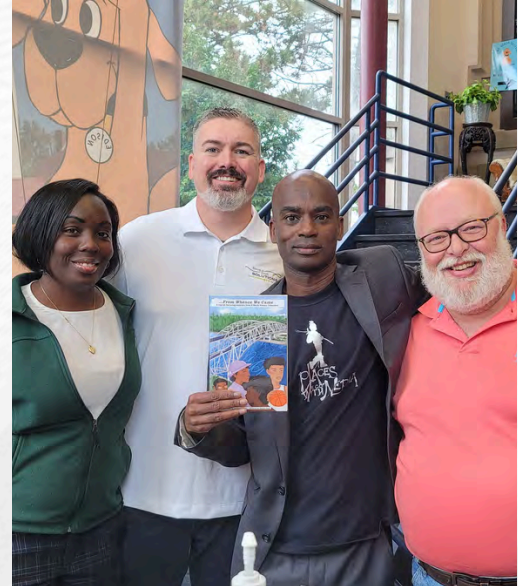
Community leadership is not about control or micromanagement. It's not about making decisions in isolation or prioritizing short-term fixes over meaningful, long-term solutions. A strong leader empowers teams, trusts their expertise, and supports them in achieving shared goals. By focusing on alignment, open communication, and mutual respect, leaders can build resilient communities where everyone feels valued and engaged.

## Nate's Approach to Community Leadership

Community leadership is about creating connections that inspire action and understanding. At its core, it's about listening—truly listening—to the voices that make up a community, uncovering their needs, dreams, and challenges. I believe that meaningful progress starts with building trust, fostering relationships, and aligning efforts around shared goals.

In my experience, governments thrive when collaboration is prioritized. Leadership isn't about controlling outcomes; it's about empowering others to contribute their strengths and ideas. By facilitating open dialogue and creating a culture of respect and accountability, I work to ensure that every voice is heard and every decision reflects the community's broader vision.

I understand that navigating the complexities of local government requires both strategy and heart. Whether it's bridging gaps between elected officials and staff or guiding teams through strategic alignment, I approach challenges by staying true to our DHS values, adapting to the unique needs of each community, and fostering alignment to create actionable solutions. For me, leadership is about helping communities cut through the noise, align their vision, and move confidently toward a brighter future together.



## ABOUT THE FIRM – WHY COBALT?

Cobalt has been very active in providing non-profit community research services to local units of government across the United States. What do Cobalt partners say to communities considering partnering with us?

- *“The in-depth data analysis and feedback has been extremely helpful. We have been able to focus on the areas that drive results and improve processes.”*
- *“I would recommend Cobalt.”*
- *“We love you. (We already say it to other communities!)”*
- *“A local government reached out to me recently to ask about partnering with Cobalt. I highly endorsed your services based on your responsiveness.”*
- *“Do it!”*
- *“Cobalt is responsive to requests and meeting our organization’s time frames. Utilizing Cobalt now for many years, we have great trend lines from our annual statistically valid citizen survey.”*
- *“Cobalt provides very high-quality services at reasonable costs.”*

Subjects covered in past surveys include custom topics related to areas as diverse as marijuana regulation to housing needs. Core benchmarking questions include public safety, parks, local economy, events, transportation infrastructure library, shopping/dining, public trust, communications, and customer service, and more. Cobalt provides research services that comply with generally accepted research principles and comply with the requirements of national services such as the ACSI.

In addition, projects and services will be led by Cobalt staff who have been certified by the Marketing Research Association’s Professional Researcher Certification (PRC) program, which is endorsed by major national and international research organizations such as the AMA (American Marketing Association), the ARF (Advertising Research Foundation), CMOR (Council of Marketing and Opinion Research), IMRO (Interactive Marketing Research Organization), MRII (Marketing Research Institute International), the RIVA Training Institute and the Burke Institute.

### Key differentiators:

- As a 501c3, Cobalt provides a more value-rich solution that requires minimal staff effort at a favorable cost.
- Cobalt’s questions are very flexible. All questions can be modified, any question can be deleted, and there is no limit on the number of custom questions you can add to ensure your needs are met.
- Cobalt provides benchmarking indices compiled annually from residents in thousands of communities. Benchmarking to a firm’s prior clients creates a bias, as the client communities do not represent all communities, especially if the client

data are many years old. Cobalt ensures the indices are both representative and annually refreshed.

- Cobalt benchmarks also allow broader comparison to hundreds of companies, industries, and sectors through our relationship with the people behind the internationally-respected University of Michigan's American Customer Satisfaction Index (ACSI) and also the Net Promoter Score (NPS).
- Cobalt's analysis goes well beyond simple data summaries to tease out key drivers of satisfaction and outcome behaviors such as remaining in the community, recommending it to others, volunteering, community image, etc. This makes the data more immediately actionable.
- Cobalt is committed to inclusive research. Our analysis ensures that the voices of all groups within the community are clearly presented. This supports greater sensitivity to all the needs of the community and how experiences, priorities, and preferences are consistent or are different for each group.
- Cobalt's mission is research and education, and our commitment to our partners continues long after the final reports are delivered. Other firms may charge annual fees for you to have access to your data or to ask additional questions.

## SURVEY LEAD

The survey lead will be William SaintAmour. William serves as Executive Director of Cobalt Community Research. He also has served as the Agency Services Operations Director in the State of Michigan Department of Management and Budget, Senior Executive Assistant for Policy and Public Affairs in the State of Michigan Department of Management and Budget, the Board, Legislative and Legal Affairs Business Process Owner in the Michigan Office of Retirement Services, the Research Director in the Municipal Employees' Retirement System of Michigan, and ADP. He has worked in the research and communications fields over 30 years.

Mr. SaintAmour earned an executive leadership certificate from the University of Michigan Ross Business School, a master's from Michigan State University, and a bachelor's from the University of Michigan in Dearborn. He has Certificates of Achievement in Public Plan Policy in employee health and employee pensions and received the Professional Researcher Certificate from the Marketing Research Association. Mr. SaintAmour also holds a Master Planner Certificate from Michigan State University and serves on the Charlotte Rising Main Street Board and on the organization's Economic Vitality Committee.

Mr. SaintAmour will be the point of contact for the [type] in this project, and he will oversee production, analysis, and reporting. Mr. SaintAmour also will present the results and recommendations.



## REFERENCES

In the last three years, Cobalt has provided services to the following municipalities. All projects included random sampling, benchmarking to regional and national benchmarks, and the development of custom questions to assist with planning, prioritizing and budgeting. Typical project costs per survey range from \$16,000 to \$29,000.

### **City of Royal Oak, Michigan**

(Citizen survey projects in 2013, 2015, 2017, 2019, 2020, 2022; Marijuana Policy Study in 2019)  
Judy Davids, Community Engagement Specialist  
211 South Williams Street  
Royal Oak, Michigan 48067  
judyd@romi.gov  
(248) 246-3201

### **Southeast Michigan Council of Governments**

(Numerous member, policy, and employee survey projects through 2024)  
Mike Spence, Governmental Government Effectiveness  
1001 Woodward Avenue, Suite 1400  
Detroit, Michigan 48226  
Spence@semcog.org  
(313) 402-9380

### **City of Copperas Cove, Texas**

(Citizen and employee survey project in 2010, 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021)  
Kevin A. Keller  
Public Information Officer  
kkeller@copperascovetx.gov  
(254) 547-4221 ext. 6243

### **City of Troy, Michigan**

(Citizen survey project in 2021 and 2024, Business Survey Project in 2021, Budget Survey Project in 2023, Library Millage Project in 2020)  
Robert Bruner, Assistant City Manager  
500 W Big Beaver Rd.  
Troy, MI 48084  
Bob.Bruner@troymi.gov  
(248) 524-3326

### **City of Walla Walla, Washington**

(Citizen survey projects in 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024)  
Elizabeth Chamberlain, City Manager  
15 North 3rd Avenue  
Walla Walla, WA 99362  
echamberlain@wallawallawa.gov  
(509) 524-4350

### **City of Ridgefield, WA**

(Community engagement/benchmarking projects in 2015 and 2020)  
Kirk Johnson  
Finance Director  
510 Pioneer Street, Suite B  
Ridgefield, WA 98642  
Kirk.Johnson@ci.ridgefield.wa.us  
(360) 857-5008

Cobalt is a unique non-profit organization offering affordable, scientifically rigorous research and analysis to local governments across the United States. It offers deep experience with engagement research, priority development, specialized topic exploration and benchmarking. A full list of our partner communities and firms can be found at [www.cobalt360.org/partners--participants.html](http://www.cobalt360.org/partners--participants.html).

## PROPOSAL

### I. PROJECT APPROACH

Double Haul Solutions (DHS) is pleased to submit the scope of work within to conduct a comprehensive Workplace Climate Survey, and related consulting/facilitation services, for the City of Mt. Pleasant. We are excited about the opportunity to leverage our expertise, and that of our partners, in an employee engagement and organizational climate assessment to provide meaningful insights and actionable recommendations for the City of Mt. Pleasant's workforce.

DHS specializes in delivering tailored project scopes of work that are specific to each client. Our approach ensures that each engagement is customized to meet the unique needs of the organization, fostering a workplace culture of inclusivity, engagement, healthy team dynamics, and continuous improvement.

#### Double Haul Solutions' Approach to Employee Engagement Surveys

At Double Haul Solutions (DHS), we take a 360-degree approach to understanding employee sentiment and workplace culture. We don't just collect data—we dig deeper, connect the dots, and create solutions that drive meaningful change. Our methodology goes beyond a standard survey, ensuring a holistic and actionable analysis of employee engagement.

#### Comprehensive Methodology for Maximum Insight

To deliver a thorough and insightful workplace climate survey, DHS leverages our relationship with Cobalt Community Research, a nationally known and respected 501c3 nonprofit, non-partisan community research group. Cobalt combines big data with local insights to help communities thrive as changes emerge in the economic, demographic and social landscape.

By integrating both quantitative and qualitative research methodologies, The DHS/Cobalt Team ensures that every employee's voice can be heard, and results translated into actionable objectives.

#### Why DHS?

We Go Beyond the Standard Survey:

- ✓ **A Holistic Approach:** We blend data analytics with human insight, ensuring findings are both statistically valid and emotionally resonant.
- ✓ **Comprehensive & Inclusive:** We assess engagement from all perspectives—management, employees, and unions—ensuring no voices are overlooked.





- ✓ **Beyond Data Collection:** We don't just present data; we identify root causes and propose practical, high-impact solutions tailored to your organization.
- ✓ **Commitment to Transparency & Confidentiality:** Our process maintains trust and integrity, ensuring employees feel safe to express themselves.
- ✓ **Sustained Engagement Strategy:** We help organizations track progress over time, providing ongoing recommendations for meaningful improvement.

With DHS, an engagement survey isn't just a report—it's the foundation of a thriving workplace!

## II. PROJECT TEAM

- April Lynch, Organizational Development & Executive Leadership Coach, Double Haul Solutions: Project Lead
- William SaintAmour, Executive Director, Cobalt Community Research: Survey and Data Lead
- Torri Mathes, Communications & Engagement Specialist: As Needed Communications Support
- Nate Geinzer, Founder & CEO/Community Leadership Specialist: As Needed Project Support

## III. SCOPE OF SERVICES

### Phase I: Survey Development & Deployment

- **Tailored to Your Organization:** We customize survey questions to reflect the specific challenges and opportunities within the organization, ensuring relevance and accuracy.
- **Inclusive Approach:** Our survey is designed for all employees, from unionized staff to management, capturing perspectives across all levels.
- **Mobile & Desktop Accessibility:** To increase participation, the survey will be accessible on multiple platforms, making it convenient for employees to respond. We will work with each client to ensure an access plan for those employees who don't typically have access to computers such as field personnel.

### Phase II: Focus Groups & One-on-One Interviews

- **Going Beyond the Numbers:** While survey data provides key metrics, real insights come from personal experiences. DHS facilitates structured focus groups and confidential one-on-one interviews to add depth to survey findings.
- **Safe and Open Dialogue:** We create a trustworthy environment that encourages honest feedback while maintaining strict confidentiality.
- **Focus groups** will be determined after an approved scope of work and will be organized in alignment with final survey development & deployment.



### Phase III: Data Analysis & Action-Oriented Reporting

- **Identifying Patterns & Themes:** Our analytics team goes beyond surface-level numbers to uncover deeper trends in employee engagement and workplace culture.
- **Benchmarking & Industry Comparisons:** Where applicable, we compare results with industry standards to provide meaningful context.
- **Customized Recommendations:** Rather than generic solutions, we develop tailored, strategic actions to address identified issues and opportunities for improvement.

### Phase IV: Presentation to Organizational Leadership & City Commission

- **Clarity & Transparency:** DHS delivers a clear, data-driven presentation to key stakeholders, ensuring they understand the findings and their implications.
- **Confidentiality First:** While findings are shared transparently, we maintain strict confidentiality to protect employee anonymity and foster trust.
- **Engagement & Discussion:** Rather than a static report, we facilitate interactive discussions with leadership teams to strategize the next steps.

### Value Add

- **Executive Coaching:** Three months of executive coaching by our Certified Executive Coach is included as a value add. Our executive coach will engage with the City Manager and/or HR Director monthly to support the implantation of recommendations and/or with any other coaching needs.

### Ongoing Tracking

- **Sustained Improvement:** A survey should be the start of a long-term improvement strategy. We will provide practical recommendations to support the organization's progress tracking initiatives over time.
- **Pulse Checks & Follow-Ups:** DHS suggests periodic check-ins and mini surveys to measure progress and fine-tune strategies.
- **Continuous Partnership:** We go beyond a one-time survey—DHS is available to remain a trusted advisor, offering guidance on engagement strategies and best practices.



## IV. OPTIONAL SERVICES: EMPLOYEE ENGAGEMENT SUCCESS COACH AND ACTION PLANNING

At **Double Haul Solutions (DHS)**, we believe that a survey should be the beginning—not the end—of an organization’s journey toward **enhanced employee engagement, workplace satisfaction, and operational excellence**. To maximize impact, we are equipped to offer additional support through:

1. **A Dedicated Success Coach**
2. **The Development of a Formal Action Plan with Measurable Outcomes**

### Success Coach: Guiding Organizations Toward Real Change

DHS can integrate a Success Coach into the engagement survey process to ensure that survey insights translate into real and sustainable organizational progress.

What Does a Success Coach Do?

- ✓ **Bridges Data & Action:** Helps leadership interpret survey findings and create a strategy for meaningful change.
- ✓ **Facilitates Leadership Development:** Works with managers and supervisors to enhance communication, team collaboration, and conflict resolution skills.
- ✓ **Supports Employee Engagement Initiatives:** Assists in crafting programs, incentives, and recognition systems that align with survey results.
- ✓ **Drives Accountability:** Supports leadership with establishing organizational milestones and progress tracking.
- ✓ **Customizes Approaches:** Works one-on-one with leaders, teams, or departments to address specific challenges and opportunities revealed in the survey.

Potential Offerings of a Success Coach:

- Leadership Trainings
- Employee Development Workshops
- One-on-One Executive Coaching
- Mediation and Team Building
- Follow-up Employee Feedback Mechanisms

By embedding a Success Coach into the process, organizations can move beyond simply acknowledging engagement challenges to actively improve employee experience and organizational effectiveness.



## Action Planning & Outcomes

DHS believes in turning survey insights into concrete actions. As part of our post-survey process, we can help organizations develop a formal action plan that includes:

- **Clear Objectives:** Define organizational success objectives based on survey results.
- **Priority Focus Areas:** Identify 3-5 key engagement drivers that need immediate attention.
- **Tactical Strategies:** Outline specific initiatives (e.g., enhanced leadership training, new recognition programs, workload redistribution).
- **Measurable Outcomes:** Establish Key Performance Indicators (KPIs) to track progress.
- **Timelines & Accountability:** Assign responsibilities and set deadlines for implementation.
- **Feedback Loops:** Schedule pulse surveys and check-ins to measure effectiveness over time.

## Why Add a Success Coach & Action Plan?

- ✓ **Ensures Follow-Through:** Many engagement surveys reveal organizational challenges, but without a structured plan, organizations struggle to implement real change.
- ✓ **Boosts Leadership Effectiveness:** Coaching helps leaders develop the skills necessary to create a thriving workplace.
- ✓ **Increases Employee Buy-In:** Employees are more likely to trust leadership when they see tangible organizational development efforts and results.
- ✓ **Tracks Measurable Progress:** The action plan holds the leadership team accountable with clear goals and success metrics.
- ✓ **Fosters Long-Term Improvement:** Sustainable change requires ongoing effort, not a one-time survey.

By integrating a Success Coach and Action Plan, DHS helps organizations not only assess employee engagement but actively improve it—leading to a more motivated, productive, and satisfied workforce.



## V. PROJECT TIMELINE

Project Kickoff/Plan of Action	1 Week
Survey	4 Weeks
Development/Deployment & Focus Groups	
Data Analysis Completed	2-3 Weeks
Reports/Recommendation	2 Weeks
Final Deliverable	1 Day
<ul style="list-style-type: none"> <li>Organizational Leadership Review</li> <li>Optional: Employee Meeting</li> <li>Presentation to City Commission</li> </ul>	

## VI. FIRM INFORMATION AND REFERENCES

### ORGANIZATION INFORMATION

Double Haul Solutions  
Brighton, MI 48116  
248-207-5293 (c)

EIN: 87-2174640  
EST: October 2021

### PROJECT AND PROFESSIONAL REFERENCES

Rick Galardi, Supervisor  
DeWitt Charter Township  
517-281-9707  
rickgalardi@me.com

Mary Marshall, Village President  
Village of Pentwater, MI  
231-869-8301  
president@pentwatervillage.org

Kristine Bosely, HR Director  
City of Traverse City, MI  
231-922-4407  
kbosley@traversecitymi.gov

Bridget Dean, Mayor  
City of Berkley, MI  
bdean@berkleymi.gov  
248-930-0544

Colleen O'Toole, Former City Manager  
City of Saline, MI  
734-476-3961  
colleen.a.otoole@gmail.com

Niccolas Grochowski, City Attorney  
Royal Oak, MI  
248-246-3242  
niccolas.grochowski@romi.gov



## Project/Client Portfolio

Client	Scope of Work	Timeline
Baker Tilly	Subject Matter Expertise	Ongoing
Barry County	Human Resources Policy Support	2024
City of Berkley	Executive Search (Finance Director)	2023
City of Berkley	Interim City Management & Transition Support	2024
City of Ionia	Community Development Project Facilitation	2024
City of Ludington	Executive Search (City Manager)	2024
City of Morenci	Human Resources Support /Executive Coaching	2024
City of Mount Clemens	City Commission Goal Setting	2022
City of Mt. Pleasant	Executive Search (Finance Director)	2024
City of Northville	Strategic Project Prioritization	2022
City of Northville	Interim Housing Director	2023
City of Northville	Project Management Support	2023
City of Port Huron	Community Engagement	2022
City of Port Huron	Community/Economic Development Support	2023-2024
City of Royal Oak	Executive Search (City Manager)	2024
City of Saline	Executive Search (DPW Director)	2024
City of Tecumseh	Team Building	2022
City of Traverse City	Interim City Management	2023
City of Traverse City Downtown Development Authority	Executive Search (DDA Director)	2024
City of Zeeland	Financial Sustainability Review (w/Municipal Analytics)	2025
DeWitt Charter Township	Executive Search (Township Manager)	2024
DeWitt Charter Township	Strategic Planning	2025
Downtown Ferndale	Governance Training & Team Building	2024
Saline Area Fire Authority	Governance Training & Team Building	2024
Village of Dundee	Executive Search (Village Manager)	2024
Village of Lexington	Team Based Village Management Services	2023 - Current
Village of Pentwater	Executive Search (Village Manager)	2024



## VII. FEE SCHEDULE

CONSULTING FEES	
SCOPE OF WORK	AMOUNT
<b>Workplace Climate Services</b>	
Workplace Climate Consulting & Facilitation	\$13,200
Survey Development, Administration, & Analysis	\$9,500
Requested Printed Materials	At Cost
Travel & Other Expenses	No Cost
3 Months Executive Coaching	Value Add
<b>EXECUTIVE SEARCH TOTAL (EXCLUDING OPTIONS)</b>	<b>\$22,700</b>
<b>OPTIONAL SERVICES</b>	
Success Coach	Request Pricing
Action Planning	Request Pricing
Additional Trips Beyond 1	\$750 per Day & per Consultant

**Payment Terms:** Net 30 Days. 25% Deposit, 25% at Survey Close, 50% Upon Project Completion.

**Timeline:** The 8-to-10-week timeline outlined above is contingent on DHS's ability to effectively receive materials and follow up and assumes timely employee responses to the employee engagement survey





## VIII. NOTICE TO PROCEED

By signing below, I verify that I am a representative of the Client; I agree with the scope of services to be provided and related Fee Schedule; I accept the Consulting Services Terms and Conditions; and that I have the authority to bind the Client in the engagement of these services.

CLIENT:

City of Mt. Pleasant

CONSULTANT:

Double Haul Solutions

By: \_\_\_\_\_

Its: \_\_\_\_\_

By: Nate Geinzer

Its: Founder/CEO

WITNESS:

Sign: \_\_\_\_\_

Print: \_\_\_\_\_

WITNESS:

Sign: \_\_\_\_\_

Print: \_\_\_\_\_



## TERMS AND CONDITIONS

THE CLIENT AND CONSULTANT AGREE AS FOLLOWS:

### **Article I. Statement and Performance of Work.**

For payment by the Client as provided under this signed Scope of Professional Services (the "Contract"), Consultant shall perform the work, duties and responsibilities as described in the above Scope of Professional Services (the "work"), which is made a part of this Contract by this reference, in a competent, accurate, efficient, timely, good, professional, thorough, complete and responsible manner, and in compliance with the terms and conditions set forth below.

### **Article II. Timing of Performance.**

Performance of this Contract shall commence immediately upon execution by both parties, and performance of the work shall be completed according to the timing set forth in the work. The timing for performance of any such work may be extended for additional specified periods of time, if allowed in writing by the Client in its sole discretion.

### **Article III. Contract Price and Payment**

A. Subject to the terms and conditions of this Contract, the Client agrees to pay Consultant in the amount and manner set forth in the work (referred to in this Contract as "payments"). Such payments are in exchange for and consideration of the timely and satisfactory performance and completion of authorized work required under and pursuant to this Contract.

B. The Client agrees to pay Consultant amounts due within thirty (30) days of receipt of an itemized billing/invoice from Consultant detailing all work performed and provided in connection with the billing and the hours and charges applicable to each such item of work. Such itemized billings shall be submitted and shall be paid only upon satisfactory completion of the work itemized in the billing.

C. All costs and expenses incurred by Consultant in the course of performing the work under this Contract are deemed to be included in the hourly fees and amounts set forth in the work, unless specifically identified in the work as reimbursable expenses and such expenses have been approved by the Client or its designee.

D. Consultant will obtain written approval of the Client prior to proceeding with any services or work that is not stated in the work; otherwise the Client will not be billed for such extra/additional services or work.

E. Payments shall be made upon verification of invoices received by the Client. All payments to Consultant shall be submitted by mail at Consultant's address listed on the invoice, unless Consultant provides written notice of a change in the address to which such payments are to be sent, or by electronic means as provided for with Consultant invoices.



F. Upon successful completion of Services, Client agrees to allow its logo and/or name to be used on Consultant's website identifying past clients.

#### **Article IV. Duration and Termination.**

A. This Contract, including any extension or amendment of this Contract, may be terminated at any time, with or without cause, by either party upon thirty (30) calendar days' written notice to the other party. In such event, the effective date of such termination shall be the 30th calendar day following the date of the written notice of such termination.

B. In the event this Contract is terminated prior to completion of the work, the Client shall not be responsible to make any further payments for work performed after the effective date of such termination and shall pay Consultant for such work as has been completed and is eligible for payment under the terms of this Contract through the date of such termination. In all events, the Client shall only be responsible to make the payments described in the preceding sentence if, at the Client's request, Consultant continues to fully perform its duties and obligations in full compliance with the terms of this Contract through the effective date of the termination. Additionally, termination shall not relieve Consultant of its obligation to provide Client with all of the plans and product(s) generated under this Contract through the effective date of termination. Articles V, VI, VII and VIII of this Contract shall survive completion of the work and any termination of this Contract.

C. Prior to the effective date of any termination or prior to the completion of the work (including any extension of the timing for completion), whichever is the first to occur, Consultant shall deliver to the Client all reports, opinions, compilations, research work, studies, materials, artifacts, samples, documents, plans, drawings, specifications, correspondence, ledgers, permits, applications, manuals, contracts, accountings, schedules, maps, logs, invoices, billings, photographs, videotapes and other materials in its possession or control that is gathered or generated in the course of performing the work or that relates to the work in any way; provided that Consultant may retain a copy of such materials for its files. The Client shall be permitted to withhold any payments and reimbursements otherwise owing to Consultant under the terms of this Contract until all such materials are delivered to the Client in accordance with the terms and conditions of this Contract.

#### **Article V. Independent Contractor Relationship.**

A. In the performance of this Contract, the relationship of Consultant to the Client shall be that of an independent contractor and not that of an employee or agent of Client. Consultant is and shall perform under this Contract as an independent contractor, and no liability or responsibility with respect to benefits of any kind, including without limitation, medical benefits, worker's compensation, pension rights, or other rights or liabilities arising out of or related to a contract for hire or employer/employee relationship shall arise or accrue to either party as a result of the performance of this Contract.

B. Consultant, as an independent contractor, is not authorized to enter into or sign any agreements on behalf of the Client or to make any representations to third parties that are binding upon the Client. Although Consultant is required under this Contract to advise, make recommendations to and to a limited extent represent the Client, all plans, studies, applications, submittals, surveys, reports and any other information relating to the work must be submitted to and approved by the Client or the Client's authorized official prior to



being disseminated to any third party and shall only be so disseminated if such dissemination is approved in advance by the Client or an authorized Client official. Consultant may disseminate said materials held in the public realm as a part of Consultant's portfolio of work.

C. Consultant represents that it will dedicate sufficient resources and provide all necessary personnel required to perform the work described in the work in accordance with the terms and conditions of this Contract. Except as may be specifically stated and agreed to in the work, Consultant shall perform all of the work under this Contract and no other person or entity shall be assigned or subcontracted to perform the work, or any part thereof, unless approved by the Client in advance.

#### **Article VI: Liability and Insurance.**

A. Consultant agrees to indemnify and hold harmless the Client, its elected and appointed officials and employees and attorneys, from and against any and any claims, demands, suits, losses and settlements, including actual attorney fees incurred and all costs connected therewith, for any damages which may be asserted, claimed or recovered against the Client by reason of: (i) personal injury, death and/or property damages which arises out of or is in any way connected or associated with the actions or inactions of Consultant in performing or failing to perform the work; (ii) civil damages which arise out of any dispute between Consultant and its subcontractors, affiliates, employees or other private third parties in connection with this Contract; or (iii) civil damages and penalties, including without limitation damages and penalties resulting from claims of discrimination, civil rights violations, statutory violations or constitutional violations, which arise out of any or are in any way connected or associated with the actions or inactions of Consultant. Consultant also agrees to indemnify and hold harmless the Client, its elected and appointed officials and employees and attorneys, from and against any and all claims, demands for payment, suits, losses and settlements, including actual attorney fees incurred and all costs connected therewith, for or relating to any patented or copyrighted material, process, or device that may be used in the course of performing the work or form a part of the work.

B. Consultant shall obtain and maintain during the term of this agreement, insurance coverage as outlined herein. This insurance shall not be interpreted to limit the liability of the Consultant, and all deductibles and SIR's are the responsibility of the Consultant. A certificate of insurance and endorsements shall be provided by Consultant prior to start of this agreement. (1) Worker's Compensation Insurance including Employers' Liability Coverage, in accordance with all applicable statutes of the State of Michigan. (2) Commercial General Liability Insurance on an "Occurrence Basis" with limits of liability not less than \$1,000,000 per occurrence and aggregate. Coverage shall include an endorsement stating the Client shall be named as additional insured and coverage shall be primary to any insurance carried by Client. Consultant shall give the Client immediate notice of any change in or cancellation of the coverage within five (5) days of such change or cancellation, shall provide a copy of any cancellation notice received from its insurer to the Client within five (5) days of such cancellation, and shall request that its insurer send such notice of cancellation to the Client. Consultant shall provide evidence of insurance coverage as set forth herein coverage at any time requested by the Client.

#### **Article VII. Information.**

It is expressly acknowledged and agreed that all reports, opinions, compilations, research work, studies, data, materials, artifacts, samples, documents, plans, drawings, specifications, correspondence, ledgers, permits,



manuals, applications, contracts, accountings, schedules, maps, logs, invoices, billings, photographs, videotapes and all other materials generated by and/or coming into the possession of Consultant during the term of this Contract, and any extension thereof, that in any way relate to the performance of work by Consultant under this Contract or that are otherwise related or relevant to the work belong exclusively to the Client and shall be promptly delivered to the Client upon the termination of this Contract or, at any time, upon the Client's request.

#### **Article VIII. Accuracy.**

Consultant promises that the information it provides in the work to be performed under this Contract will be accurate, excepting only inaccuracies resulting from incorrect information provided by the Client, other consultants, and/or other public sources. Consultant will not charge Client for necessary corrections to its work and will be responsible for any increased cost incurred by the Client as a result of any inaccuracies in the work excepting inaccuracies resulting from incorrect information provided by the Client other consultants and/or other public sources.

#### **Article IX. General Provisions.**

A. Entire Agreement. This instrument, together with the attached Schedules, contains the entire Contract between the Client and Consultant. No verbal agreement, conversation, or representation by or between any officer, agent, or employee of the parties hereto, either before or after the execution of this Contract, shall affect or modify any of the terms or obligations herein contained.

B. Compliance with Laws. This Contract and all of Consultant's work and practices shall be subject to all applicable state, federal and local laws, ordinances, rules, or regulations, including without limitation, those which apply because Client is a public governmental agency or body. Consultant represents that it is in compliance with all such laws and eligible and qualified to enter into this Contract.

C. Governing Law. This Contract shall be governed by the laws of the State of Michigan.

D. Assignment. Consultant shall not assign this Contract or any part thereof without the written consent of the Client. This Contract shall be binding on the parties, their successors, assigns and legal representatives.

E. Dispute Resolution/Arbitration. The parties agree that any disputes regarding a claimed violation of this agreement shall first be submitted in writing to the other party in an attempt to settle the dispute before pursuing other legal actions or notices provided for in this agreement. Such written communication shall clearly state the problem or concern, allow sufficient time for a written response from the other party, and culminate in a face-to-face meeting to determine if a remedial action is possible. In no event shall this process take more than thirty (30) days unless a specific extended period of time is agreed to by both parties in writing as being necessary. The aforementioned initial written communications between the parties also shall indicate whether the party is willing to submit the dispute to binding arbitration, nonbinding mediation, or other form of alternate dispute resolution, and share equally the costs for same. Upon the parties agreeing to any such method of dispute resolution and a timetable for doing so, pursuit of other legal actions shall be deferred until the process has been completed. In any binding arbitration, the arbitrator shall provide a written statement of the reasons



and basis for an award or decision, a judgment of the Livingston County Circuit Court may be entered based on the arbitration award or decision, and each party shall be responsible for their own costs and attorney fees.

F. Third Parties. It is the intention of the parties hereto that this Contract is not made for the benefit of any private third party. Consultant agrees that no private party or parties will be allowed to hold sway or influence, in any way, over Consultant's performance of the work.

G. Notices. Written notices under this Contract shall be given to the parties at their addresses contained in this Contract by personal or registered mail delivery to the attention of the following persons:

Client: \_\_\_\_\_ City of Mt. Pleasant

Consultant: Nate Geinzer, Founder & CEO, Double Haul Solutions

H. Changes. Any changes in the provisions of this Contract must be in writing and signed by the Client and Consultant.

I. Waivers. No waiver of any term or condition of this Contract shall be binding and effective unless in writing and signed by all parties, with any such waiver being limited to that circumstance only and not applicable to subsequent actions or events.

J. Jurisdiction and Venue of Contract. This Contract shall be considered for all purposes, including the establishment of jurisdiction and venue in any court action between the parties, as having been entered into and consummated in City/Township/City of Brighton, Livingston County, Michigan.

K. Conflict. In the event of any conflict or inconsistency between the above provisions of this Contract and Scope of Professional Services, the provisions in the above text shall govern.



# Memorandum



TO: Aaron Desentz, City Manager  
FROM: Jason Moore, DPW Director  
DATE: February 13, 2025  
SUBJECT: Resident Difficulty with Refuse and Recycling Carts During Snow Events

At the February 10 meeting, commissioners raised concerns about the ability of some residents to move their refuse and recycling carts to the curb during snow events. I would like to share a few options that might be helpful.

- Contact Granger  
Granger may be willing to make accommodations. They have worked with several residents who have challenges moving their carts(s) to the curb.
- Isabella County Commission on Aging  
The Isabella County Commission on Aging has a Gold Key Volunteer program where residents can volunteer to assist with a variety of unique needs of the community. The county has a web page describing this program and the Commission can be reached at (989)-772-0748.
- Mary Ellen Brandel Volunteer Center at CMU  
This volunteer center gives CMU students the opportunity to serve the Mt. Pleasant community.
- Local Handy Man Services and Landscaping/Plowing Companies  
Local businesses would be willing to help. Many times, people reach out on social media to offer their services, such as shoveling or snow plowing during snow events.
- Skip the Week  
With the extra volume available in the carts, residents may choose to wait until the following week's collection until conditions improve.

To date, our office has not received any calls concerning a resident's inability to transport their bin(s) to the curb due to snow. If there are concerns among residents, we would encourage them to first call Granger. I hope this offers some points to consider should a future discussion be necessary.



To: Aaron Desentz, Mt. Pleasant City Manager  
Mayor Wingard  
Vice Mayor Eke  
Commissioner Alsager  
Commissioner Perschbacher  
Commissioner Busch  
Commissioner Rollins  
From: Rosewood VI Condo Association  
Date: 2/19/25  
Regarding: Trash Pick Up and Recycling

This letter is regarding the new trash pick-up and recycling. It became obvious quickly that the city had not considered the various condo communities within the city when looking at alternative trash and recycling vendors/programs. Some of the main concerns that were overlooked include:

- Many of us have private cul-de-sacs which a truck could not get down and even if they could, we pay to maintain these roads.
- The issue of space and where to keep two large carts because many only have a single car garage. When it was initially being discussed, residents could have the option of a recycling cart but that changed.
- If every unit within our association signed up for service, we would have had 40 carts on the recycling weeks to try to find space to line them up on Gaylord with two feet between each of them. In case you are not familiar, there are multiple cul-de-sacs on the East side of Gaylord Street one right after the other. There simply would not have been enough space.
- While the carts do sport big wheels, they can be very difficult for some of our older residents to manage.
- And now, we have the issue of snow piles and trying to get the carts on top of the snow mounds.

With the previous service, we could load our bags and recycling in our car and take it down to Gaylord. Trash bags could be placed close together without any concerns and the small recycling bins were easily managed.

After multiple calls to Granger and to the city, at the last minute, after the initial sign-up period, a bag and tag option was made available. However, residents who choose this method no longer have an option for curbside recycling. It's funny, because initially when the proposal was being discussed, residents could choose if they wanted to also have a recycling cart. And then, based on comments made at an Isabella County Commission meeting, it sounds like the Materials Recycling Center put pressure on the city and suddenly it became that if you wanted trash service, you would also be required to have a recycling cart. This was slipped in quietly after the initial presentation and the narrative changed to how important recycling is. So, why is it not important for all residents then? Residents in our community utilizing the bag and tag system must take it to the MRF if they want to recycle.

We know that every decision comes down to the bottom line, and if you want to know what is valued, follow the dollars. But we urge you to think about the impact your decisions have on all your tax paying residents. We have included some pictures from this week. The first is after just a few people put out their carts on the mounds of snow. Some won't be able to manage it. The second, is the other side of our drive where the snow is even higher.

Thank you for your time.



# Memorandum



MEMO TO: Aaron Desentz, City Manager

FROM: Mike Kurbel, Information Technology Director

DATE: February 24, 2025

SUBJECT: PC Replacements for Windows 11 Upgrade

## Reason:

The Windows 10 operating system is end-of-life on October 2025. When an operating system is end of life, it no longer receives security updates that make the City's network safe. As a result, all PCs will need to be on Windows 11 by this date. Unfortunately, some PCs are too old to get this upgrade and the hardware will need to be replaced. This requires buying new desktops, laptops and Microsoft Surface tablets.

After reviewing each piece of hardware that needs to be replaced, the pricing of various online outlets where we have a government account and any government deals that are available, we are confident that the purchase of new equipment plus their 4-year warranties should go through our MI Deal partners at CDWG. We estimate the total cost to be \$100,000. Some divisions have already budgeted for new computer replacements this year totaling \$30,600. Taking what has already been budgeted and subtracting that from the total cost needed; we will need a total of \$69,400.

## Recommendation:

I recommend the City Commission approve the PC Replacements for the Windows 11 Upgrade for \$100,000 and the approval of an IT budget amendment of \$69,400 to supplies to accommodate these purchases.

Previously budgeted Funds are available in the current Engineering and the following DPS budgets.

# Memorandum



TO: Aaron Desentz, City Manager

FROM: Stacie Tewari, City Engineer

DATE: February 11, 2025

SUBJECT: Award Contract for the 2025 Mill & Overlay Project Bid

## Request:

The City Commission is requested to award the contract for the 2025 Mill & Overlay Project to Central Asphalt Inc, Mt. Pleasant, Michigan for \$1,414,545.00.

## Reason:

As part of the 2025 Capital Improvement Plan, milling and resurfacing of several major and local streets, along with parking lots is scheduled this year. This work includes removal and replacement of some existing curbs, gutters and sidewalk ramps for upgrades due to ADA requirements. The project schedule is June 2 to July 18. This work is necessary to improve the pavement quality of the streets. The following locations are included in the 2025 Mill & Overlay Project Bid:

<b>Thin Overlay:</b>	<b>Mill &amp; Overlay:</b>
<b>Major Streets</b>	
Corporate from Mission to Packard	Fancher: Pickard to Industrial *
Packard from Pickard to Corporate	Industrial: Fancher to Mission *
<b>Minor Streets</b>	
Bennett : Mission to Brown	Briarwood: York to Fairfield *
Canterbury : Crapo to Portabella	Fairfield: Mission to Lynnwood *
Garwood : High to North	Lynnwood: York to Preston *
Gaylord : Crapo to Sweeney	York: Briarwood to Lynnwood *
Lincoln : Russell to dead end	Elva: Broomfield to the South *
Maple : Thomas to Garwood	Abbey: Churchill to Sweeney ***
Morning Mist : Wexford to Abbey	Brentwood: Buckingham to Abbey ***
Morning Mist Ct : dead end to Morning Mist	Buckingham: Churchill to Brentwood ***
Portabella : Crapo to Canterbury	Churchill: Broomfield to Abbey ***
Sweeney : Dead end to Gaylord	South: Brown to Crapo***
Wexford : Morning Mist to Sweeney	Carnahan: Dead end to Fairfield ***
Ashland: Oakland to Pickard **	
Beech: Ashland to Woodland **	
Woodland: Ashland to Bradley**	
South: Crapo to Mary***	
<b>Parking Lots</b>	
Parking Lot #11 **	Parking Lot #9
City Hall & Riverview Apartments **	

# Memorandum



- \* Street moved up in schedule due to special funding
- \*\* Changed from Mill & Overlay due to cross section of original asphalt surface
- \*\*\* Additional locations added to contract not included in original bid

On February 11, 2025, the following bids were received:

Bidder	Amount
Central Asphalt Inc, Mt. Pleasant, MI	\$1,121,880.81
Leavitt & Starck Excavating, Inc. Lansing, MI	\$1,279,598.60

Central Asphalt, Inc. is the lowest bidder, and the city has previously had contracts with this company.

Division I	Budget	Central Asphalt, Inc. Bid Amount
Major Streets	\$0.00	\$346,177.50
Division II	\$595,000.00	\$669,720.32
Division III		
Parking Lots 9 & 11	\$42,000.00	\$31,085.22
Parking Lots City Hall & Riverview Apartments	\$161,000.00	\$74,897.77
Total Budget	\$798,000.00	Project Subtotal \$1,121,880.81
Additional local street locations not included in original bid		\$292,664.00
Special funding received from State Representative Roger Hauck	\$800,000.00	
Proposed Amended Budget	\$1,598,000.00	Project Total \$1,414,544.81

The Riverview apartments portion of the City Hall parking lot location will be reimbursed by the Mt Pleasant Housing Commission, at an estimated amount of \$9,788. The remainder of the City

# Memorandum



Hall parking lot will be split with the Condo Association at a rate of 78% to 22% per the ownership agreement. Estimates are \$48,633 City and \$16,478 condo. Both amounts will be invoiced after the project is completed and funds will be deposited back into the general fund.

The city was awarded an additional \$800,000.00 in road funding from the state, allowing for various streets to be moved ahead in the CIP schedule.

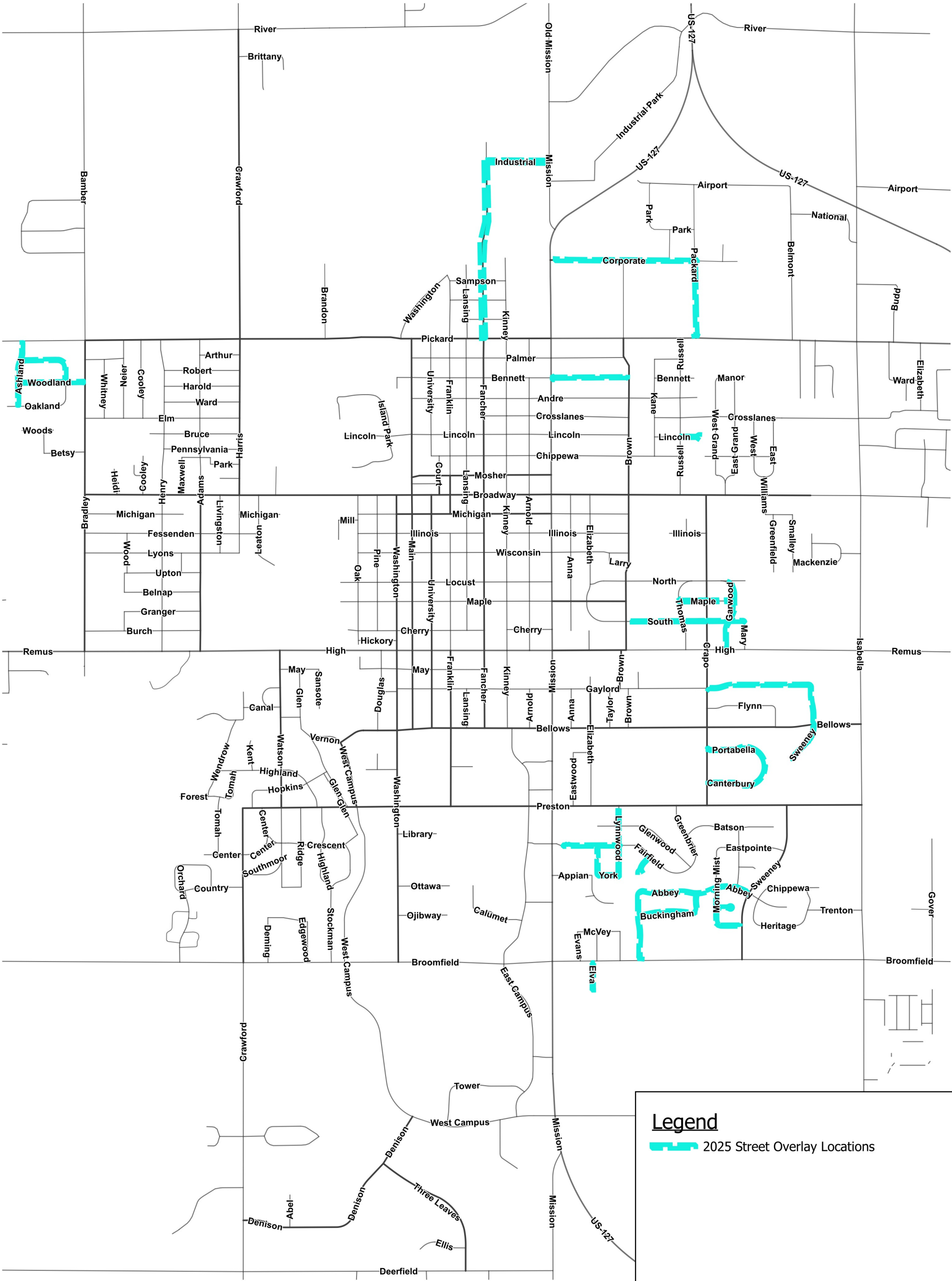
## Recommendation:

I recommend the City Commission award the contract for the 2025 Mill & Overlay Project to Central Asphalt, Inc. for \$1,414,545.00, and approval of a budget amendment of \$346,180.00 from the Major Street fund and a budget amendment of \$367,390.00 from the Local Street fund, for the additional resurfacing of Major Streets and Local Streets. Funds are available in the Major Streets & Local Streets Operating Budgets.



# Street Project Overview Map 2025

City of Mt.Pleasant



## Legend

 2025 Street Overlay Locations



Public Works *Mt. Pleasant*  
Engineering [meet here]

City of Mt. Pleasant - 320 West Broadway - Mt. Pleasant, MI 48858 - [www.mt-pleasant.org](http://www.mt-pleasant.org)

0 0.5 1 Miles



Published: Feb-14-2025  
\\compile\DPW\Budget\CIP\Engineering\



City Manager Performance Evaluation

City of Mount Pleasant

Evaluation period: January 2024 to December 2024

\_\_\_\_\_  
Governing Body Member's Name

Each member of the City Commission should complete this evaluation form, sign it in the space below, and return it to Boomer Wingard, Mayor. The deadline for submitting this performance evaluation is March 10th, 2025. Evaluations will be summarized and included on the agenda for discussion at the regular meeting on March 24th, 2025.

\_\_\_\_\_  
Mayor's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Governing Body Member's Signature

\_\_\_\_\_  
Date Submitted

## INSTRUCTIONS

This evaluation form contains ten categories of evaluation criteria. Each category contains a statement to describe a behavior standard in that category. For each statement, use the following scale to indicate your rating of the city manager's performance.

**5 = Excellent** (almost always exceeds the performance standard)

**4 = Above average** (generally exceeds the performance standard)

**3 = Average** (generally meets the performance standard)

**2 = Below average** (usually does not meet the performance standard)

**1 = Poor** (rarely meets the performance standard)

Any item left blank will be interpreted as a score of "3 = Average"

This evaluation form also contains a provision for entering narrative comments, including an opportunity to enter responses to specific questions and an opportunity to list any comments you believe appropriate and pertinent to the rating period. Please write legibly.

Leave all pages of this evaluation form attached. Initial each page. Sign and date the cover page. On the date space of the cover page, enter the date the evaluation form was submitted. All evaluations presented prior to the deadline identified on the cover page will be summarized into a performance evaluation to be presented by the governing body to the city manager as part of the agenda for the meeting indicated on the cover page.

## PERFORMANCE CATEGORY SCORING

### 1. INDIVIDUAL CHARACTERISTICS

\_\_\_\_\_ Diligent and thorough in the discharge of duties, "self-starter"

\_\_\_\_\_ Exercises good judgment

\_\_\_\_\_ Displays enthusiasm, cooperation, and will to adapt

\_\_\_\_\_ Mental and physical stamina appropriate for the position

\_\_\_\_\_ Exhibits composure, appearance and attitude appropriate for executive position

Add the values from above and enter the subtotal \_\_\_\_\_  $\div 5 =$  \_\_\_\_\_ score for this category

## 2. PROFESSIONAL SKILLS AND STATUS

- \_\_\_\_\_ Maintains knowledge of current developments affecting the practice of local government management
- \_\_\_\_\_ Demonstrates a capacity for innovation and creativity
- \_\_\_\_\_ Anticipates and analyzes problems to develop effective approaches for solving them
- \_\_\_\_\_ Willing to try new ideas proposed by governing body members and/or staff
- \_\_\_\_\_ Sets a professional example by handling affairs of the public office in a fair and impartial manner

Add the values from above and enter the subtotal \_\_\_\_\_  $\div 5 =$  \_\_\_\_\_ score for this category

## 3. RELATIONS WITH ELECTED MEMBERS OF THE GOVERNING BODY

- \_\_\_\_\_ Carries out directives of the body as a whole as opposed to those of any one member or minority group
- \_\_\_\_\_ Sets meeting agendas that reflect the guidance of the governing body and avoids unnecessary involvement in administrative actions
- \_\_\_\_\_ Disseminates complete and accurate information equally to all members in a timely manner
- \_\_\_\_\_ Assists by facilitating decision making without usurping authority
- \_\_\_\_\_ Responds well to requests, advice, and constructive criticism

Add the values from above and enter the subtotal \_\_\_\_\_  $\div 5 =$  \_\_\_\_\_ score for this category

## 4. POLICY EXECUTION

- \_\_\_\_\_ Implements governing body actions in accordance with the intent of council
- \_\_\_\_\_ Supports the actions of the governing body after a decision has been reached, both inside and outside the organization
- \_\_\_\_\_ Understands, supports, and enforces local government's laws, policies, and ordinances
- \_\_\_\_\_ Reviews ordinance and policy procedures periodically to suggest improvements to their effectiveness
- \_\_\_\_\_ Offers workable alternatives to the governing body for changes in law or policy when an existing policy or ordinance is no longer practical

Add the values from above and enter the subtotal \_\_\_\_\_  $\div 5 =$  \_\_\_\_\_ score for this category

## 5. REPORTING

- \_\_\_\_\_ Provides regular information and reports to the governing body concerning matters of importance to the local government, using the city charter as guide
- \_\_\_\_\_ Responds in a timely manner to requests from the governing body for special reports
- \_\_\_\_\_ Takes the initiative to provide information, advice, and recommendations to the governing body on matters that are non-routine and not administrative in nature
- \_\_\_\_\_ Reports produced by the manager are accurate, comprehensive, concise and written to their intended audience
- \_\_\_\_\_ Produces and handles reports in a way to convey the message that affairs of the organization are open to public scrutiny

Add the values from above and enter the subtotal \_\_\_\_\_  $\div 5 =$  \_\_\_\_\_ score for this category

## 6. CITIZEN RELATIONS

- \_\_\_\_\_ Responsive to requests from citizens
- \_\_\_\_\_ Demonstrates a dedication to service to the community and its citizens
- \_\_\_\_\_ Maintains a nonpartisan approach in dealing with the news media
- \_\_\_\_\_ Meets with and listens to members of the community to discuss their concerns and strives to understand their interests
- \_\_\_\_\_ Gives an appropriate effort to maintain citizen satisfaction with city services

Add the values from above and enter the subtotal \_\_\_\_\_  $\div 5 =$  \_\_\_\_\_ score for this category

## 7. STAFFING

- \_\_\_\_\_ Recruits and retains competent personnel for staff positions
- \_\_\_\_\_ Applies an appropriate level of supervision to improve any areas of substandard performance
- \_\_\_\_\_ Stays accurately informed and appropriately concerned about employee relations
- \_\_\_\_\_ Professionally manages the compensation and benefits plan
- \_\_\_\_\_ Promotes training and development opportunities for employees at all levels of the organization

Add the values from above and enter the subtotal \_\_\_\_\_  $\div 5 =$  \_\_\_\_\_ score for this category

## 8. SUPERVISION

- \_\_\_\_\_ Encourages heads of departments to make decisions within their jurisdictions with minimal city manager involvement, yet maintains general control of operations by providing the right amount of communication to the staff
- \_\_\_\_\_ Instills confidence and promotes initiative in subordinates through supportive rather than restrictive controls for their programs while still monitoring operations at the department level
- \_\_\_\_\_ Develops and maintains a friendly and informal relationship with the staff and work force in general, yet maintains the professional dignity of the city manager's office
- \_\_\_\_\_ Sustains or improves staff performance by evaluating the performance of staff members at least annually, setting goals and objectives for them, periodically assessing their progress, and providing appropriate feedback
- \_\_\_\_\_ Encourages teamwork, innovation, and effective problem-solving among the staff members

Add the values from above and enter the subtotal \_\_\_\_\_  $\div 5 =$  \_\_\_\_\_ score for this category

## 9. FISCAL MANAGEMENT

- \_\_\_\_\_ Prepares a balanced budget to provide services at a level directed by council
- \_\_\_\_\_ Makes the best possible use of available funds, conscious of the need to operate the local government efficiently and effectively
- \_\_\_\_\_ Prepares a budget and budgetary recommendations in an intelligent and accessible format
- \_\_\_\_\_ Ensures actions and decisions reflect an appropriate level of responsibility for financial planning and accountability
- \_\_\_\_\_ Appropriately monitors and manages fiscal activities of the organization

Add the values from above and enter the subtotal \_\_\_\_\_  $\div 5 =$  \_\_\_\_\_ score for this category

## 10. COMMUNITY

- \_\_\_\_\_ Shares responsibility for addressing the difficult issues facing the city
- \_\_\_\_\_ Avoids unnecessary controversy
- \_\_\_\_\_ Cooperates with neighboring communities and the county
- \_\_\_\_\_ Helps the council address future needs and develop adequate plans to address long term trends
- \_\_\_\_\_ Cooperates with other regional, state and federal government agencies

Add the values from above and enter the subtotal \_\_\_\_\_ ÷ 5 = \_\_\_\_\_ score for this category

## NARRATIVE EVALUATION

What would you identify as the manager's strength(s), expressed in terms of the principle results achieved during the rating period? \_\_\_\_\_

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What performance area(s) would you identify as most critical for improvement? \_\_\_\_\_

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What constructive suggestions or assistance can you offer the manager to enhance performance? \_\_\_\_\_

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What other comments do you have for the manager; e.g., priorities, expectations, goals or objectives for the new rating period? \_\_\_\_\_

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## City Manager

### General Summary

As the Chief Administrative Officer, the City Manager acts as the principal liaison between all City operations and the City Commission. The City Manager leads the organization to excellence, while utilizing collaborative problem solving, goal setting, strategic planning, and policy development. Utilizing an inclusive and team-based approach, the City Manager acts as the visionary for the organization by mentoring, developing, and directing staff. This position is responsible for protecting and preserving the assets of the City of Mt. Pleasant and its citizens.

### Essential Job Functions

Responsible for the activities of the City of Mt. Pleasant and is accountable to the City Commission for the overall performance of the City in carrying out the City's mission. The City Manager provides policy guidance, advice, and recommendations from a comprehensive perspective to the City Commission regarding City issues and is responsible for implementing City Commission decisions. Ensures all laws, Charter provisions and Acts of the City Commission are faithfully executed and implemented.

Responsible for preparation of all agenda materials for City Commission meetings and attendance at all City Commission meetings. Furnishes the Commission with information regarding the City's matters and prepares, submits, and explains such reports as may be required, including an annual report.

Applying participative management principles, and embraces team involvement, communication and performance expectation practices. The City Manager is responsible for leading this success-oriented organization to service excellence through mentoring, team concepts, problem solving and innovative action.

Collaboratively works with management team members to evaluate operational needs to meet the goals and objectives; develops, recommends, and administers policies and procedures.

Plans for the future welfare of the City through evaluating the organizational structure, staffing levels, and departmental activities; seeks input from and provides guidance and leadership to the organization's senior leaders and ensures continuous improvement in the efficiency and effectiveness of the organization.

Works with the senior leaders to conduct short and long-range goals and develop strategic work plans; keeps the City Commission, employees, general public, and others informed on future community needs, programs, financing, and personnel requirements, and economic and social trends affecting the City.

Oversees the development and administration of the City's annual operating budget and capital improvements plan (CIP); approves expenditures and budgetary adjustments as appropriate, and keeps the Commission advised of financial conditions, program progress, present and future needs of the City.

Effectively responds to inquiries and clearly explains regulations, policies, and procedures to employees, general public, members of the business community, and representatives of other

agencies; and professionally represents the City to local, state, and federal agencies and citizen groups with integrity.

Collaboratively works with other local units of government and local partners to carry out the mission of the City.

Develops and maintains positive relationships with local media.

Maintains professional development and up-to-date knowledge in the field of public administration.

Direct supervision of the City Manager's Senior Executive Assistant, Human Resources Director, and four Division Directors.

Serves on City and Community Boards as necessary.

Performs related work as requested.

Note: All functions are considered essential

### **Minimum Requirements**

#### ***Education:***

Graduation from an accredited college or university with a Bachelor's Degree (required) or Master's Degree (preferred) in public or business administration, finance, organization development, or related field; a minimum of seven year's progressively responsible managerial experience in municipal government or an equivalent combination of education and proven successful experience providing the required knowledge, skills, and abilities. Credentialed as a City Manager under the ICMA-CM program, preferred.

#### ***Knowledge Of:***

Principles and practices used within public administration and local government such as interest based bargaining techniques, collective bargaining, employee development, employee relations, business development, budgeting, contracting, economic development, goal setting, and vision building.

#### ***Skilled In:***

Direct responsibility for management and supervision of a large multi-service organization with full responsibility for development and administration of the budget.

#### ***Ability To:***

Independently and cooperatively plan, organize, prioritize, coordinate, and evaluate the activities and services of the City, manage multiple events and activities, analyze problems, identify alternative solutions, project consequences of proposed actions, and implement recommendations; and build and actively participate in the development and maintenance of successful and professional work teams.

Effectively communicate, orally and in writing, with team members, colleagues, and the public regarding any aspect within the scope of responsibility; and with a collaborative disposition establish and maintain positive working relationships with employees, the public, the media and local, state and federal agencies. Uses proven problem-solving techniques to resolve issues and conflict.

Must possess a high level of professional and personal integrity and be committed to the concept of organizational excellence through motivation, training, and development of employees.

Experience with a major university, and prior experience with developing positive and collaborative working relationships with senior university administration personnel would be a definite asset.

***Additional Requirements:***

Valid Driver's License and a safe driving record.

Must reside and maintain principle domicile within the limits of Isabella County or within 20 miles from the nearest city limit, whichever is greater, within twelve months of hire.

**Physical and Mental Demands and Work Environment**

The physical and mental demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to talk and hear. The employee frequently is required to sit, stand, walk, use hands to manipulate, handle, or feel. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus. Must possess the physical and mental abilities to transport self to meetings, conferences, etc.; analyze, reason, supervise, comprehend, evaluate, organize, and handle the stress associated with administrative and supervisory responsibilities. The noise level in the work environment is usually moderate.

<b>Job Title</b>	<b>Job Code</b>	<b>FLSA Status</b>
City Manager	N100	Salaried Exempt
<b>Employee Group</b>	<b>Reports to</b>	<b>Direct Reports</b>
PACT by Contract	City Commission	6

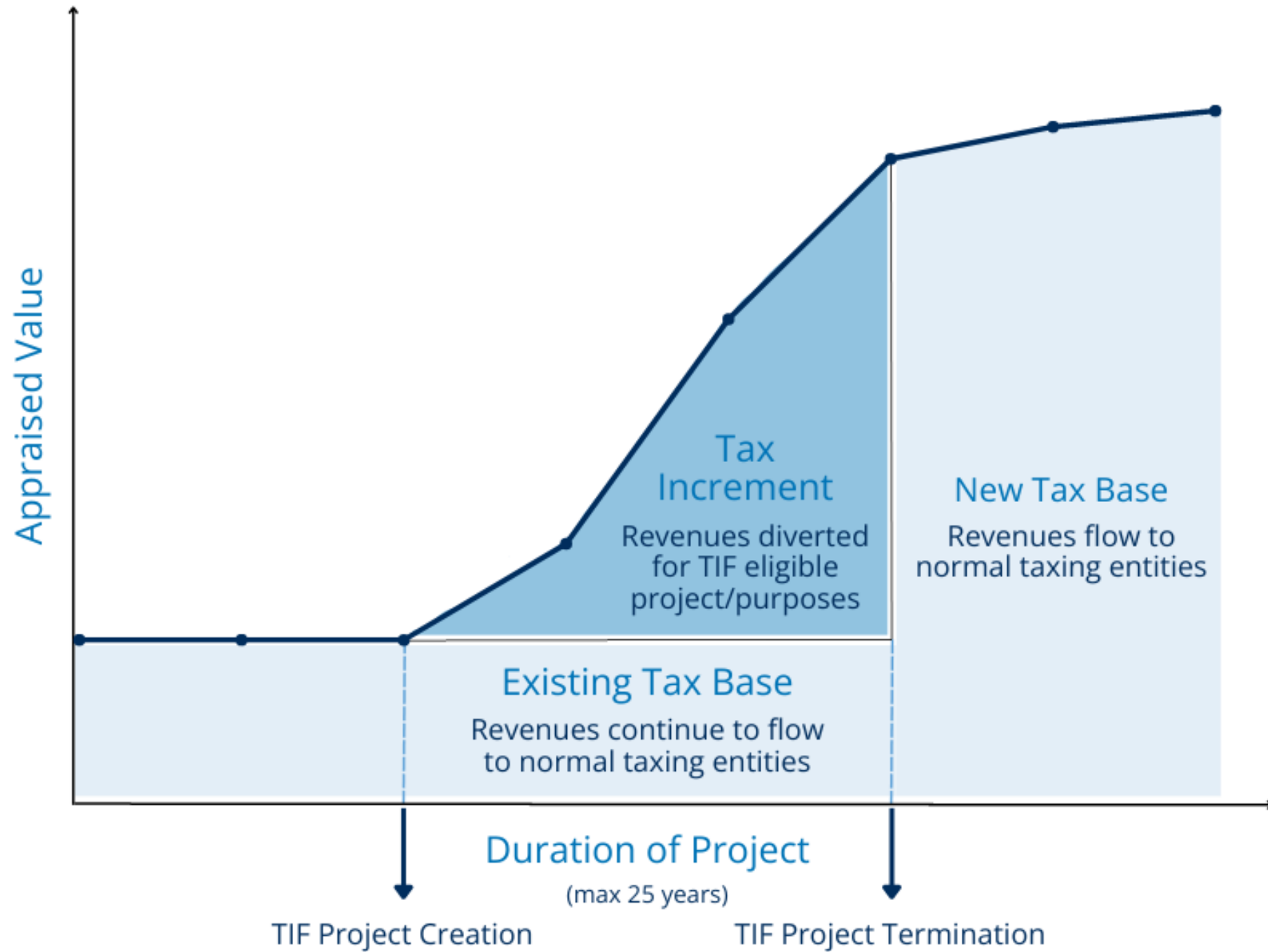
# CBD TIFA

*Mt. Pleasant*  
[meet here]

# Work Session Agenda

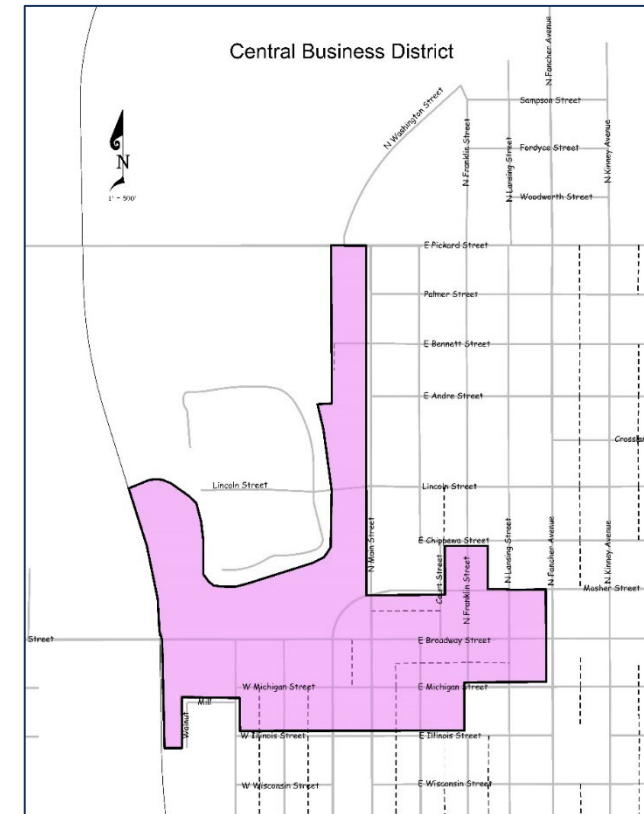
1. Review what the Central Business District (CBD) Tax Increment Finance (TIF) does.
2. Discuss financial capabilities and potential projects/programs.
3. Request direction from City Commission.

*Mt. Pleasant*  
[meet here]



# Central Business District (CBD) TIFA

- Created on December 17, 1984.
- Amended five times for development plan modifications.
- Plan expires December 31, 2025.
- Zero capture rate since 2019.
- Primary focus was streetscape debt and parking lot reconstruction.



*Mt. Pleasant*  
[meet here]



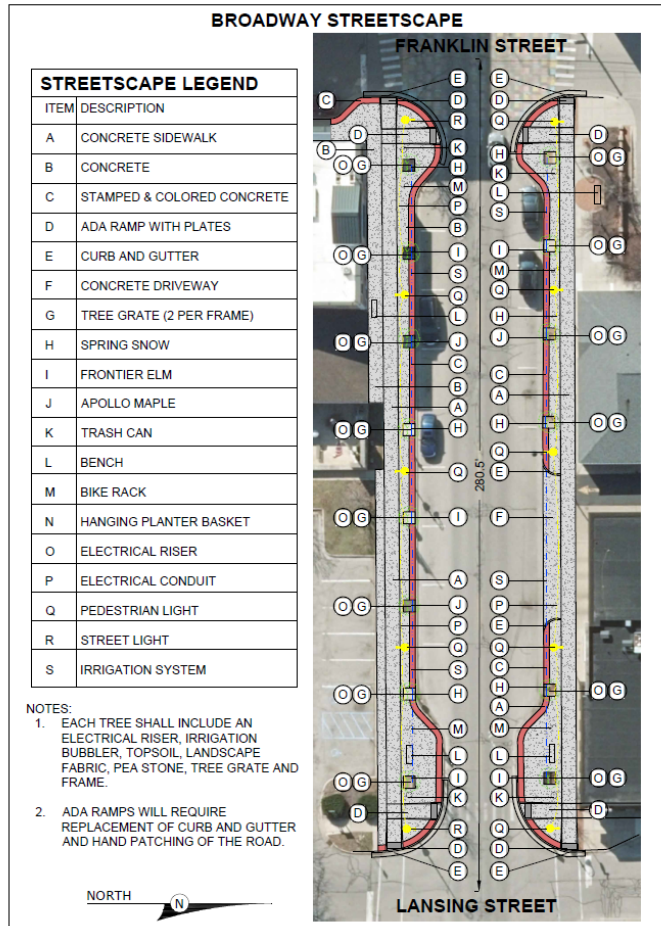
# Finances

- Current Taxable Value: \$24,482,262
- City Capture: \$400,000
- County Capture: \$240,000
- Total Capture: \$640,000
  - Note: City Commission could consider partial capture as has been done in other districts (Mission Street)

# Programs/Projects

- Downtown Infrastructure Needs
  - Irrigation
  - Electrical Upgrades
  - Streetscape Replacement
  - Wayfinding
- Incentives
  - Infill Development
  - Site Selection/Preparation

# Streetscape Replacement



- In coordination with irrigation, trees, electrical, receptacles, light poles, bike racks, trash cans, stamped and colored concrete

*Mt. Pleasant*  
[meet here]

# Infill Development



*Mt. Pleasant*  
[meet here]

# Site Selection/Preparation

- Similar to a program offered by the Michigan Economic Development Corporation
  - Site analysis
  - RFP/RFQ development
  - Site design
  - Environmental assessments
  - Marketing assistance

# To Capture or Not To Capture?

- Tax capture in the district results in loss of the City's General Fund
  - However, needed funding would otherwise come from the General Fund
- Same applies to capture from Isabella County
  - However, little value in capturing from City only
  - Need for funding to support projects/programs

# Direction

- Proposed method forward:
  - City Commission provides consensus to staff on the direction forward
    - What projects or programs should be considered?
    - Is the City Commission in support of capture?
  - If not in support of capture,
    - Is there reason to continue the TIFA?



# Direction (continued)

- If in support of capture,
  - Staff will work on a TIFA plan for the agreed to projects/programs
  - Staff will calculate the needed revenue for said projects/programs
  - Staff will return to the City Commission for approval of the plan

# Questions/Discussion

*Mt. Pleasant*  
[meet here]