

**City of La Crosse Organizational Development Program Investment - REVISED (JUST PHASE I & II)**

Phase	Phase	Activity	Rate per Hour		Total Cost	Hrs - Travel	Hrs
			\$125.00	\$589.00 per trip			
Phase 1	"The Why?" Project Buy-in Through a Facilitated Discussion	A. Develop leadership / commitment / design / initiation	\$125.00	\$589.00	\$435.00	4	4
		B. Agree upon project goals / outcomes	2	1	\$620.00	6	6
		C. Agree upon strategy to communicate the project / pro	1	1	\$310.00	3	3
Deliverable: Signed "Project Charter", of commitment to the project/process by participants			5	4	\$1,365.00	\$1,667.25	13
Ph I Subtotal				\$589.00	\$1,078.35		
Discounted Subtotal							
Phase 2	Organizational Assessment / Report & Data Gathering	A. An organizational assessment and review of existing City Prep pre-planning Department On-line Survey	5	5	\$1,550.00	15	15
		B. Review existing departmental functions / reports	1	3	\$125.00	1	1
		C. Review existing funding sources	4	10	\$1,055.00	10	10
		D. Review various documents including the operating bu	10	10	\$3,100.00	30	30
		E. Review La Crosse's functions and operations as compar	2	4	\$250.00	2	2
		F. Assist City in the review of a citizen and employee surv	4	6	\$1,240.00	12	12
Deliverable: Report containing an assessment / analysis / synthesis of existing city operations, a summary of the [citizen survey] and interviews, benchmarks and revenue streams as the relate to the City, and a summary of the process			32	28	\$9,178.00	\$8,430.20	88
Ph II Subtotal				\$589.00	\$9,178.00		
Discounted Subtotal							
Total			37	32	\$10,545.00	\$8,330.55	101
Discount					-\$447.45		
Travel					\$1,767.00		
Total					\$10,097.55		

**What you are getting in this cost:**

- Master facilitators and trainers
- Professional consulting services and strategic plan deliverables
- All materials and handouts
- All overhead, direct costs, and general administration costs
- All costs associated with project management

Invoices will be made at the end of each phase. This is an estimate and any of the above activities can be changed based on your need. It is my pleasure to provide City of La Crosse with this proposal.

**Walter Jankowski** - Reinvention Consultant, Reinvention, LLC



Proposal for Organizational Development Program

### Company Background

Request	Response
A. <i>Type of Organization</i>	This project will be proposed as a single entity for all services through Reinvention, LLC, an S-Corporation that was formed in December, 2009.
B. <i>Provide the length of time that the company has been in business and ownership history of prime and its sub-consultant(s) or joint venture partner(s). (If prime entity is a wholly-owned subsidiary of another corporation, please provide details).</i>	Reinvention, LLC is solely owned by Walter Jankowski, Principal Reinvention Consultant
C. <i>Provide the location of the principal office that will be responsible for implementing this contract. Provide the location of other offices from which resources may be drawn.</i>	424 W. Mifflin Street – Unit 413 Madison, WI 53703
D. <i>Provide the location of other offices from which resources may be drawn</i>	None
E. <i>Size, resources and capabilities of responding entity:</i> a. <i>Organizational Structure of business entity for this project</i>	Reinvention, LLC business model is based on hiring experienced staff with the project need (project managers, business analysts, statisticians, financial analysts, process improvement specialists, etc.).  There will be a core team assigned to the project and based on the outcomes of Phase I, Reinvention, LLC will bring in the appropriate expertise. Core team expertise and experience are presented in Appendices A, B, and C



Request	Response
b. <i>Services and professional disciplines provided in-house by prime responding entity</i>	Overall, Reinvention, LLC helps senior executives and organizations do things cheaper, better, faster. We've helped all sectors -government, non-profits, financial, insurance, manufacturing, etc. streamline their organizations. Specific services, professional disciplines, and projects are presented in Appendices A, B, and C. All staff are partners and experts in their given field.
F. <i>Specialized Experience and Qualifications</i>	Specialized overall experienced of the core team are presented in Appendix B.1 and B.2..
a. <i>Specific experience with organizational development / improvement for local government of municipalities of population &lt; 25,000</i>	<p><b>Government / Non-Profit Experience:</b></p> <input type="checkbox"/> City of Oshkosh Strategic Planning and Performance Metrics <input type="checkbox"/> Portage County Strategic Planning <input type="checkbox"/> Oshkosh Museum Strategic Planning <input type="checkbox"/> City of Stoughton Strategic Planning & Performance Metrics <input type="checkbox"/> Monroe Arts Center Strategic Planning <input type="checkbox"/> Monona Library Strategic Planning
b. <i>Organization and Key Personnel</i>	Reinvention Core Team and detailed experience is listed in Appendix B. Core Team includes:
<p>1. <i>Identify primary contact and any key personnel/staff contact information and provide their experience, responsibilities, and qualifications. One page resumes of the proposed project team preferred.</i></p>	<ul style="list-style-type: none"> <li>• <b>Walter Jankowski</b> Reinvention Consultant (WJ)</li> <li>• <b>Brian Chapman</b> Organizational Development Specialist – City of Oshkosh (BC)</li> <li>• <b>Rebecca Altenhoff</b> Organizational Improvement Specialist (RA)</li> <li>• Additional staff may be brought in based on need</li> </ul>
2. <i>Names of Staff with the following experience:</i>	

Experience	WJ	BC	RA	Reinvention Contractors
<input type="checkbox"/> <i>Public administration as a city administrator/manager</i>	NA	NA	NA	NA
<input type="checkbox"/> <i>Strategic planning for local governments (cities &gt; 50,000 pop.)</i>	X	X		X
<input type="checkbox"/> <i>Organizational assessments of local governments (cities &gt; 50,000 pop.)</i>	X	X		X
<input type="checkbox"/> <i>Municipal finance, and municipal financing systems</i>		X		X
<input type="checkbox"/> <i>Professional affiliations/certifications in finance, planning, public administration, management, law</i>	X	X	X	X
3. <i>Indicate if the proposed project team has completed similar projects for other clients and if so, list the clients and projects. If the proposed team has not worked together previously, briefly state why the proposed team should be selected</i>	This particular team has worked together with the City of Oshkosh Strategic Planning and Oshkosh Museum Strategic planning			

## Approach

- H. Consultants shall describe their approach to the project and how they will provide deliverables.
- a. A description of the consultants understanding and approach to the project, including projected timeline showing milestone dates and anticipated project deliverables.

Phase	Activity	Approach / Method	Output/Deliverable	Time
<b>Phase 1</b> "The Why?" Project Buy-in Through a Facilitated Discussion	A. Develop leadership / commitment / design / initiation	<input type="checkbox"/> <b>Scope / Outcome Definition Meeting:</b> Pre-meeting with Mayor and Consultant Ad Hoc Committee (and any other key leaders) to discuss draft project goals desired outcomes, and deliverables.  <input type="checkbox"/> <b>Approach and Buy-In Session:</b> Joint session with City Council, Mayor, and Department Heads	<b>Deliverable:</b> Signed <b>Project Charter</b> of commitment to the project/process by participants – SEE APPENDIX D – SAMPLE DELIVERABLES	1-2 hours prep work 2 hours of facilitation 1 hour post work  ✓ Sept 18-Sept 30*
	B. Agree upon project goals / outcomes	Proposed Facilitated Session Agenda: I. Welcome & Introductions by Mayor II. Comparing City of La Crosse to World Class III. Overview of Proposed Assessment and Planning Process IV. Discussion of Why This? Why Now? V. Examples of Other City Improvement Efforts and Results VI. Overview of Example Deliverables VII. Next Steps and Timeline VIII. Q & A		
	C. Agree upon strategy to communicate the project / process	<input type="checkbox"/> <b>Input Review:</b> Core Team review of all inputs shown to the left (A-G) and performs analysis of similar size cities  <input type="checkbox"/> <b>Department Assessment Survey:</b> Prepare and deliver an on-line Department Assessment Survey for Department heads (complete with employees if preferred) – SEE APPENDIX E for example questions  <input type="checkbox"/> <b>Follow-up</b> interviews (as necessary)		
<b>Phase 2</b> Organizational Assessment / Report & Data Gathering	A. An organizational assessment and review of existing City functions, including Council / Committee structure, all Boards, Committees, Commissions, and typical agendas		<b>Deliverable:</b> <b>Assessment / Analysis Report</b> containing a synthesis of existing city operations, a summary of the [Citizen survey] interviews, benchmarks, revenue streams, potential opportunities for improvement and a summary of the process	16 hours  ✓ Oct 1 – Nov 15*
	B. Review existing departmental functions / reports ✱			
	C. Review existing funding sources			



Phase	Activity	Approach / Method	Output/Deliverable	Time
<b>Phase 2 (con'd)</b> Organizational Assessment / Report & Data Gathering	D. Review various documents including the operating budget, audit reports, comprehensive plan, and facility plans	<input type="checkbox"/> <b>Assessment / Analysis Report Out Meetings:</b> Report out meetings to 1) Mayor and Consultant Ad Hoc Committee, 2) Department Heads, 3) City Council	<b>Deliverable:</b> <b>City Council Pre-Planning Survey Results</b> including Council priorities and responses to Assessment / Analysis Report	12 hours  <input checked="" type="checkbox"/> Report Out Mtgs Nov 15 – Dec 31  <input checked="" type="checkbox"/> City Council Survey Jan 1- Jan 15, 2014  <input checked="" type="checkbox"/> Compiled Results Jan 21, 2014
	E. Review La Crosse's functions and operations as compared to national benchmarks	<input type="checkbox"/> City Council Review of Assessment / Analysis Results		
	F. Assist City in the review of a citizen and employee survey (if available or wanted)	<input type="checkbox"/> <b>City Council Pre-Planning On-line Survey:</b> City Council completes a shortened on-line survey prior to strategic planning sessions		
	G. Interview Mayor / Council Members / City Administrator / Department Heads (as needed)	<input type="checkbox"/> Compile Council on-line survey results  <input type="checkbox"/> Provide all results to planning participants prior to the strategic planning session		

b. Description of the type and level of support the consultant will require / expect from the project sponsor—such as staff support, provision of meeting space, materials, meals, etc.. RESPONSE: Reinvention, LLC will need approximately 4-6 hours of City staff support work to coordinate the scheduling of meeting dates and space.