



July 2, 2014

Mr. Nick Chiulos
Assistant County Administrative Officer
County of Monterey
168 West Alisal Street
Salinas, CA 93901

Dear Mr. Chiulos:

We are pleased to provide this proposal to prepare a strategic plan for the County of Monterey Parks Department. Our team members have helped many organizations develop strategic plans and we welcome the opportunity to assist the County of Monterey. In this proposal we have provided information about Management Partners, our understanding of the engagement, a description of strategic planning, an explanation of our proposed approach to the engagement, qualifications of our project team, and references for our strategic planning work.

About Management Partners

As you may know, Management Partners was founded in 1994 with a specific mission to help local government leaders improve their service to the public. We are a national consulting firm with offices in San Jose and Costa Mesa, California, as well as Cincinnati, Ohio. We have a well-established track record of helping public sector organizations throughout the United States, including all of the services provided by cities, counties, towns and special districts at the local level.

During our 20 years of service, we have earned a national reputation by delivering quality, actionable work products to our clients. We bring extensive experience to this project, along with first-hand knowledge of local government operations. We are distinguished by the fact that each team we assign is led and staffed by associates who have actual experience in direct public service and experience working together as a team. The work we do is not an academic exercise; it is grounded in the real world of customer service and accomplishment in the public sector. As a result, we have a bias for producing value-added work for each client that will be actionable, and will be implemented.

The firm is staffed with 80 professionals who are experienced public service managers as well as qualified management consultants. This group includes generalists as well as subject-matter experts. Our consultants have years of experience working in all aspects of local government management and have built a track record of extraordinary quality service for our clients.

We have extensive experience helping improve both the efficiency and effectiveness of local government services. We have completed organizational staffing and improvement projects in virtually every type of local government service, including reviews of entire governments as well as selected studies of individual departments and functional activities.

Management Partners' services include everything required to support a local government leader, elected or appointed. Our full range of services includes the following:

- Strategic and Business Planning – Can be an important tool for focusing the efforts of an organization and fostering communication between leaders, staff and important stakeholder groups.
- Organizational Analysis and Performance Audits – Also called efficiency studies and organizational reviews, identifies improvements to an operation's efficiency and effectiveness.
- Performance Management – Encompasses a wide range of management tools that can be and often are developed independently of one another, including: performance management and measurement, process management, performance budgeting, employee performance evaluation and strategic and process benchmarking.
- Process Improvement – Examines the processes by which customers are served, an important technique for developing a program for operations improvement, including process mapping.
- Financial Planning, Budgeting and Analysis – Assists clients in analyzing their finances and planning for the effective and efficient use of taxpayer or customer dollars.
- Organizational Development and Training – Helps clients develop organizational capacity, a key to developing high performance organizations. Services include executive coaching, customer service training, employee and customer surveys and conflict management workshops.
- Sharing and Consolidation of Services – Offers a more efficient way to provide services, particularly on a regional basis. Options range from the complete integration of previously separate jurisdictions to sharing or consolidating the management of individually delivered services and operations.
- Interim Management – Assists government leaders by providing executive staff during transitional periods. Rather than just "keeping the chair warm," our interim managers provide value-added services during their tenure.
- Executive Recruitment – Identifies top candidates for chief executive officer positions and department director level jobs in local governments.



We are also experienced in executive management facilitation, having facilitated numerous council/board and management team workshops and meetings. We have designed and led many civic engagement projects of a broader nature, often in conjunction with strategic planning projects. We are specialists in performance management and led the creation of the International City/County Management Association's (ICMA) Center for Performance Measurement. In addition, we have supported many local governments (cities, counties and towns) in the design and implementation of jurisdiction-specific performance management programs. Staff development and training is always a priority, especially in the area of performance measurement, where we have trained well over 100 jurisdictions throughout North America.

Financial and business planning is an important part of our work and assisting local governments (particularly large ones) in addressing the effects of the recent recession has been an area of major emphasis. Working with cooperating local governments to identify and implement shared service delivery has also been an area of particular competence, especially in the current economic environment.

We offer a balance of perspectives with a practitioner's bias and a proven track record of successful consulting engagements. This experience gives us a sensitivity that produces positive outcomes. Each of our projects is individually tailored to the unique needs of the client. We have a deep understanding of the service environment of local government and we are proud to say that as a result of our quality work, many of our clients ask us to complete subsequent assignments.

Understanding of the Engagement

The County of Monterey has eight parks within four major areas serving a county population of approximately 426,000, and other users from outside Monterey County. The Parks Department is facing significant financial challenges in its general fund and enterprise fund units. Costs have increased in employee-related areas, capital improvements and technology upgrades. Revenues are down due to the extreme drought. Low water levels in two parks have caused the County to reduce its revenue projections by over 50% from last year. County staff recommended to the Board of Supervisors that cost reductions be made through layoffs and reduced funding for buildings and maintenance.

As a result of these financial challenges, the County intends to prepare a strategic plan for the Parks Department. A Board of Supervisors committee has been appointed to guide this process.

The strategic plan will set forth a vision for County parks, the mission of the Parks Department, goals that will include expectations about financial self-sufficiency and the level of general fund support in the future, and strategies for achieving the goals. Through the process, policies that guide operations will be examined and potentially modified to focus on new goals. Among the factors to be reviewed are the long-standing purposes of each of the parks, park utilization, current and potential partnerships, financial trends and revenue options, the economic



development impact of the parks, and other critical factors that will provide a well-rounded picture of the County park system and alternatives for achieving greater self-sufficiency.

Stakeholder engagement will be important to inform the process and goals. Such engagement may include users of the park system, public and private partners, staff of other park systems in the area (regional and municipal), Monterey County Parks Department staff, County executives and members of the Board of Supervisors.

The County's park system is divided into four areas, as follow:

- North County Parks: Toro, Jacks Peak, Royal Oaks and Manzanita Parks
- Laguna Seca Recreational Area
- South County Parks: San Lorenzo Park, with historic museum, campground, farm and associated facilities
- Lake's Resort Parks: Lake San Antonio North Shore and South Shore, and Lake Nacimiento

Elements of Strategic Planning

A strategic plan presents a clear statement of where the County is going and how it intends to get there. It includes a vision, a description of the mission of the organization, a set of principles that will guide actions, a set of multi-year goals that guide decisions, strategies for each of the goals, and a draft implementation action plan. The implementation action plan ensures the strategic plan is realistic and achievable, and sets forth implementation steps and milestones.

Developing a strategic plan involves stakeholders, both internal and external. It also involves data gathering and analysis, so that the final result is grounded in a good understanding of the factors that will contribute to its success or present challenges in the future. An environmental scan is prepared as part of the process, containing the results of stakeholder engagement and data collection and analysis.

A strategic plan provides the overall framework to link together other plans, such as the County's strategic initiatives, plans for specific park projects, economic development, budgeting, Board policies, and plans for organizational changes. The following graphic shows these relationships.





The graphic below shows the key components of a strategic plan. Each component is described below.

A *vision* sets the focus for the future. It will be a statement of where the Monterey County Parks Department is going. Individual vision statements for each of the parks can also be created.

A *mission* is a statement of the purpose of the Park Department. It fundamentally defines what the organization stands for and what it will do. Individual mission statements for each of the parks can also be created.

Values or principles are established early on in the strategic planning process to set forth the framework for the goals and strategies. For instance, the Trust for Public Land identifies seven measures of an excellent park system. They are:

- A clear expression of purpose;
- Ongoing planning and community involvement;
- Sufficient assets in land, staffing and equipment to meet the system’s goals;
- Equitable access;
- User satisfaction;



- Safety from physical hazards and crime; and
- Benefits beyond the boundaries of the parks.

Goals set the framework that guides the direction and focus of the organization, budget decisions and allocation of other resources, such as staff time. They are “up on the balcony” wide views of opportunities for change and improvement and state the desired future. Goals or strategic priorities provide the “why” (larger meaning and context) of the specific actions the agency takes. They help the executive team decide which of the many worthy projects should be done and when, within available resources. Goals must be meaningful and attainable.

Strategies are the means to achieve the goals. They describe an approach or method and begin to answer the question: *How will we go about accomplishing the goal?* They may include broad areas to pursue, as well as individual projects.

Success indicators express the final result that is desired. Indicators should answer the question: *How will we know if we are successful at achieving what we set out to do?* For instance, a success indicator could be the degree of financial self-sufficiency for the parks or any individual park.

An **implementation action plan** is the blueprint for carrying out the strategic plan. It contains the detailed steps that must be taken to assure that the goals and strategies are achieved. An implementation plan provides the specific timelines, assignments, resource allocations, and milestones for the strategies within each goal. It is a management tool to help the organization assure that goals are attained. It is well-suited to periodic check-ins about progress, changes or challenges. An example of an implementation action plan template is shown in the following graphic.

Goal 1:					
Strategy 1:					
Key Tasks	Fiscal Year to Start/Complete	Resources		Team Members	Milestones
		Currently Available for Strategy	Needed to Carry out Strategy		

Finally, **reporting on progress** in implementing the strategic plan is key. As part of the process, a reporting structure and timeline is created. It can range from a quarterly update of each goal and strategy, to a semi-annual review, once as part of the budget process and again mid-year.



Work Plan

Based on our experience with strategic planning and our understanding of the needs of Monterey County, we have prepared a plan of work. This framework is amenable to refinement to adapt it to your specific interests.

Our process provides for ongoing and meaningful collaboration between our consultants and County staff. We believe that an effective strategic plan, one that will be successfully implemented and will guide decisions into the future, requires that it be a product of the agency that is involved. We will provide expert advice, facilitation and preparation of the strategic plan document and all of its component parts. Throughout the engagement, we will be collaborating with County staff to ensure the desired results are achieved.

Activity 1: Start Project and Conduct Kick Off Meeting

Management Partners will begin with an initial meeting with County staff and the Board committee. During the kickoff meeting we will discuss the County's objectives for the strategic plan, along with expectations for what will be included and what changes will result through this process. We will discuss the desired timeframe for the strategic plan. We typically suggest a five-year timeframe, with goals that will extend throughout that period, and specific strategies associated with each of the years of the plan.

We will review our detailed work plan and schedule for the strategic planning process as well as the roles of the parties. We will discuss the interviews, focus groups, online survey and environmental scan. Based on feedback during the meeting, we will finalize the work plan.

During this startup phase, Management Partners will gather examples of strategic plans for other park systems. These examples can help inform the County of Monterey process.

Activity 2: Obtain Stakeholder Input

Next, we will obtain stakeholder input through interviews, focus groups and an online survey, as described below. The purpose of the stakeholder input will be to hear opinions about strengths, weaknesses/limitations, opportunities and threats (SWOT) facing the overall parks system as well as individual parks. We will ask for ideas about goals for the Parks Department, and will seek input on what stakeholders view as the mission and vision for the department. We will ask about existing and potential partnerships, options for raising revenue and reducing costs, and other ideas for strengthening the future of the County's parks for public enjoyment.

- **Interviews:** We will conduct approximately 30 interviews. These will include members of the Board of Supervisors, key County executives, and several Parks Department staff. We will also interview individuals outside the County, including staff from other park



systems in the area, and representatives of existing partners (private and public). These interviews will be a combination of in-person and telephone interviews.

- **Focus Groups:** We will conduct two focus groups with users of County parks and one with department supervisors.
- **Online Survey:** We will design a survey to be placed on the County's website to ask for feedback on a number of issues pertaining to the County's parks. Existing email lists can be used by the County to distribute a link to the survey, including to stakeholder groups, and it can also be made available to the general public.
- **Written Input:** We will draft the text for an invitation to be sent by the County to stakeholder groups to seek written comments about current and future uses and other related issues pertaining to the parks.

Once we complete the stakeholder engagement component, we will create PowerPoint slides showing a summary of the key input obtained. The slides will include the following items:

- Strengths, weaknesses/limitations, opportunities and threats facing the Parks Department
- Goals suggested by stakeholders
- Mission and vision comments
- Suggestions for new or enhanced partnerships
- Suggestions for ways to reduce costs and increase revenue

Activity 3: Prepare Environmental Scan

Management Partners will work collaboratively with County staff on an environmental scan. The environmental scan will include a variety of critical data elements that will inform the development of goals and preparation of a business plan.

Management Partners will prepare a draft guide of desired information to be compiled by County staff. We will review the draft guide with County staff to ensure the suggested data points are ones that can reasonably be provided by staff. We typically suggest five years of historical data to understand trends, particularly for revenues, expenditures, park participation, and staffing data. Examples of data points for the environmental scan are provided below.

Countywide and department information, including:

- Financial forecast for the County
- Revenue and expenditure history and projections for the department
- Staffing history for the department
- Local demographic trends
- Legislative mandates impacting park services
- Regional issues impacting park services



Park-specific data for each of the eight parks, including:

- History and description of the park
- Types of uses
- Participation by category of use
- Expenditures by major type
- Revenues by major type
- List of partners and vendors

We will review the information provided, create charts and graphs, and insert the information into a PowerPoint format for presentation at the workshop described in Activity 4.

Activity 4: Conduct Strategic Planning Workshop

Next, we will facilitate a one-day workshop with County staff and, if available, the Board committee. The purpose of the workshop will be to create draft vision and mission statements, articulate a set of principles; and, draft long-range goals, strategies, priorities, and measures of success. This workshop will be informed by the work that will have preceded it pertaining to stakeholder engagement and preparation of the environmental scan. To prepare for the workshop, the following tasks will be completed.

- ***Determine workshop participants and coordinate logistics.*** We will coordinate logistics of the workshop, including location, room setup and other aspects necessary to set the stage for a productive day for all participants with County staff.
- ***Prepare a draft agenda.*** We will prepare a detailed agenda for the workshop, which may include the following components, subject to discussion with staff.
 1. Review and discuss the results of stakeholder engagement
 2. Review and discuss the environmental scan
 3. Create draft vision and mission statements, and set of values or principles
 4. Identify five to six goals for the department as a whole
 5. Identify several measurable strategies for each goal, which may include strategies for each of the parks
 6. Determine how success will be measured for each of the goals
 7. Determine reporting and accountability mechanisms

Following this workshop, we will summarize the results.



Activity 5: Prepare Strategic Plan

During this activity, Management Partners will prepare a draft strategic plan for the Parks Department, based on the results of the workshop. It will contain the following components:

- Description of project approach;
- Results of stakeholder engagement;
- Results of environmental scan;
- Vision and mission statements;
- Values or principles to guide the Parks Department;
- Five or six multi-year goals;
- Strategies for each goal;
- Success indicators; and
- Reporting and accountability mechanisms for the strategic plan.

We will review the draft with County staff and the Board committee, and make modifications based on input.

Activity 6: Prepare Implementation Action Plan

Once the strategic plan has been finalized, we will work with County staff to develop an implementation action plan. This will serve as the accountability tool for the County, as it will have timelines for implementing each of the strategies.

We will create a template and work collaboratively to complete it.. The elements of the implementation action plan will include the following for each strategy within the strategic plan:

- Key tasks,
- Timeline (start and completion dates),
- Resources needed, currently available and sources to carry out the strategy,
- Staff assigned to the strategy, including a lead person, and
- Expected milestones.

Once a complete draft implementation action plan has been prepared, we will review it with County staff. We will then finalize the document and provide it to the County.

Optional Activity: If more meetings are desired with internal or external stakeholders, Management Partners can conduct those. A contingency is suggested to accommodate additional stakeholder engagement or other meetings that may be desired during the course of the project.



Project Team

Management Partners has formed an experienced project team for this engagement. The team leader will be Jan Perkins, who will be assisted by Craig Bronzan, Sue Leto, Christine Butterfield and Heain Lee. Their qualifications are provided below.

Jan Perkins, Senior Partner, has 30 years of management experience in local government. Before joining Management Partners in 2005 she served in several California and Michigan jurisdictions, including as city manager in Fremont and Morgan Hill, California. She also served the cities of Santa Ana, California; Grand Rapids, Michigan; and Adrian, Michigan. She provides assistance to government leaders in organizational analysis, leadership development, facilitation, strategic planning, teambuilding, executive coaching and performance evaluation, workforce and succession planning, and policy board/staff effectiveness. Jan has authored a number of articles, including "Hiring 2.0: 23 Creative Ways to Recruit and Keep Great Staff," which appeared in the January/February 2011 issue of *Public Management* magazine; "Successful Leadership," March 2005, *Public Management* magazine; and "The Value of Going Back to the Basics," co-authored with former Fremont Mayor Gus Morrison, June 2005, *Western City* magazine. Jan is an ICMA Credentialed Manager.

Craig Bronzan, Special Advisor, has more than 36 years full time experience in parks, recreation, and community services. He started his career in the City of Escalon where he served as the first recreation director. He was then hired by the City of Turlock and spent over 14 years being responsible for traditional park and recreation services and programs, including the Parks and Recreation and Arts Commissions. When the parks and recreation function was merged into the Police Services Department, Craig became responsible for prevention services, neighborhood associations, animal control, grants, code enforcement, the Police Activities League, and the records division as Custodian of Records. Craig then became parks and recreation director for the City of Brentwood, with an annual budget of over \$17 million and 26 full-time staff and over 200 part time/seasonal employees. During that time he was responsible for the construction of 58 parks, a full aquatic complex, a 38-acre sport facility, two community centers, a dog park, a skate/BMX park, five joint use gymnasiums with the two local school districts, and a joint use Olympic size aquatic facility at Heritage High School. Brentwood was also one of the first communities in California to require residential development to contribute to the City's public art program. The City of Brentwood Parks and Recreation Department received numerous design and programs awards, and was recognized as one the 100 Best Communities for Youth in the nation, a six-time winner of the Playful City award, a bicycle friendly community, and was recognized as a HEAL (Healthy Eating an Active Lifestyle) City.

Susan Leto, Senior Management Advisor, has 26 years of local government experience in the parks and recreation profession. She served as the director of parks and recreation in Yorba Linda, and recreation superintendent in two cities, Yorba Linda and Riverside. She also served in the cities of Chino and Cerritos. She administered capital improvement projects, participated in labor relations, developed policies, and provided oversight to contracts and consulting activities. Her experience in recreation and community services programming ranges from



aquatics, special events and senior activities, to sports and community-based events. Since joining Management Partners in late 2009, she has provided the review, recommendations and analysis for parks and recreation focused projects, including for the California cities of Carson, San Jose and Sacramento.

Christine Butterfield, Senior Management Advisor, has worked in local government since 1992 in California, Illinois and Minnesota. She has held positions of responsibility in organizations with 1,500 employees and a budget of \$500 million (serving a population of 320,000) to communities with only 130 employees (serving fewer than 30,000 people). Christine has served as an assistant city manager and as community development director. The latter involved supervising the code enforcement and economic development processes. In this capacity with the City of Cedar Rapids, Iowa, she headed the City's response to the 2008 flooding disaster, the worst disaster in the history of Iowa and one of the most expensive disasters in the history of the United States. She has worked on numerous projects, including a master plan for parks and recreation, a flood protection plan and ten neighborhood redevelopment plans. Christine has experience managing all municipal operations as well as intergovernmental relations, strategic planning and labor negotiations. She also has considerable experience with process improvement and reengineering and has used the LEAN Six Sigma method to make improvements to land use/development entitlement functions. In this regard she oversaw implementation of the first paperless land development submission process. She has a proven ability to lead diverse teams, develop trust and build consensus in a collaborative way. In addition to her public service, Christine also has 10 years of experience working as a consultant providing strategic planning, economic development and fiscal impact analysis.

Heain Lee, Management Analyst, is a trained public policy analyst who is adept at analyzing and framing issues, both quantitatively and qualitatively. She has an in-depth understanding of economics and experience with data collection and analysis, measuring outcomes in various sectors. Her analytic training includes multivariate economic analysis, cost-benefit analysis, modeling and operations research, public financial management and budgeting, and strategic planning for the public sector. She is experienced using these tools with data, whether readily available or not, to produce tangible recommendations in team settings.

References

Management Partners has facilitated and prepared numerous strategic plans for agencies of all sizes. Additionally, we have conducted organization reviews that have included parks departments. Our combined expertise in strategic planning, organizational assessments, facilitation skills and financial analysis makes us well positioned to create a meaningful and useful strategic plan and business plan for the County of Monterey's Parks Department. The following are a few of our references representing a variety of projects, for your information.



Sacramento, California

Management Partners provided analytical and project management assistance to develop significant cost savings in four focus areas identified by the City: Parks and Recreation, Public Works and Utilities, Mayor/City Council, and Purchasing and Contracts. High-level recommendations and potential savings assessments were provided to the City in a short timeframe to meet budget needs. Proposed savings were based on best practices and Management Partners' experience in helping local governments reduce costs. Estimated savings ranged from \$770,000 to \$1,577,000 for the General Fund and from \$1,898,000 to \$2,426,000 to non-General Fund operations.

Client Contact: Mr. John Shirey, City Manager
300 Richards Boulevard, 3rd Floor
Sacramento, CA 95811
(916) 808-7495

Santa Clara County, California

The Department of Parks and Recreation's management team identified the need to clarify staff roles and expectations related to responsibilities and working relationships with other divisions. The management team wanted to engage employees in this effort by asking their views and suggestions. Management Partners designed and implemented a confidential online employee survey and conducted six focus groups to hear employees' views about roles, responsibilities, and ways to increase collaboration within the department. We analyzed the survey and focus groups and prepared a report containing the results and suggested next steps for follow up by the department. The County then engaged Management Partners to design and facilitate the work of cross-functional role clarification teams through a series of workshops that strengthened teamwork, clarified values and expectations for employees, and addressed areas of conflict between work units by clarifying roles and responsibilities.

Client Contact: Ms. Julie Mark, Deputy Director
Parks and Recreation Department
298 Garden Hill Drive
Los Gatos, CA 95032
(408) 355-2200

Orange County Cemetery District

Management Partners prepared the District's first strategic plan in 2006. The District used the first plan as a blueprint for the staff and board to follow to accomplish priority goals and projects. In 2010, we were engaged to facilitate an update for another five years. Preparation included interviewing the general managers and board members, conducting a focus group with staff and reviewing reports to learn about progress on the existing plan. We facilitated a workshop with the board and general manager to review and revise goals, identify strategies and establish priorities. The final strategic plan also included a detailed implementation action plan.



Client Contact: Mr. Tim Deutsch, General Manager
25751 Trabuco Road
Santa Ana, CA 92630
(949) 951-9102

San Jose, California

Management Partners conducted a review of reservation fees for San José's seven artificial turf fields to confirm the level of cost recovery for operations, maintenance and capital replacement. Our approach included interviews with staff, a review of available documents and historical data, benchmarking of field reservation fees with nearby cities, and application of industry best practices for artificial turf field reservation and management. Recommendations to improve cost recovery included modifying the existing fee structure to encourage rentals during low use periods, renting fields on holidays, and establishing a field replacement reserve. In addition, we developed a detailed fee calculation tool to help quantify costs and revenues associated with turf field rentals, and provided training to staff on its use so they could continue to monitor utilization and identify when rate adjustments may be needed based on actual costs and revenues.

Client Contact: Mr. Matt Cano, Deputy Director, Parks Recreation and Neighborhood Services
200 E. Santa Clara Ave, 9th Floor,
San Jose, CA 95113
(408) 535-3580

Riverside County, California

Management Partners created a strategic plan for the Riverside County Fire Department. Activities involved undertaking a stakeholder analysis including employees, volunteers and customers; preparing an environmental scan of the area in which the department operates; and conducting an organizational review and performance audit. In addition, the report included a fire station location methodology which provides a step by step process for the department to determine the proper location of fire stations in their jurisdiction. Following the completion of the plan, the department implemented the fire station location methodology that Management Partners developed and used it in determine the number and placement of the fire stations in the Lakeview Nuevo Area Plan (LNAP). Utilizing the methodology the department was able to reposition the stations previously planned for this area which resulted in the elimination of one station, which reduced construction costs by \$4 to \$5 million dollars and \$1.5 million dollars in annual operating and maintenance expenditures. The result of the project was a comprehensive strategic plan that includes goals, strategies, a detailed implementation action plan and specific organizational recommendations to improve the efficiency and effectiveness of the department for many years to come.



Client Contact: Mr. John Hawkins, Fire Chief
Riverside County Fire Department
210 W. San Jacinto Avenue
Perris, CA 92570
(951) 940-6917

Tustin, California

Management Partners facilitated the development of a strategic plan to help the City of Tustin link identified priorities to the budget process, capital improvement program, important policy considerations, economic development initiatives, and the organization's desire for continuous improvement. The process included an analysis of strengths, limitations, opportunities and threats identified through interviews and focus groups with elected and appointed officials, City employees and community stakeholders. We guided staff's preparation of an environmental scan of current and future factors influencing the city. The combination of broad-based qualitative input and quantitative trend data formed the basis for two highly interactive workshops with staff and City Council members during which a vision, mission, values and goals and strategies were developed and confirmed. Following the strategic planning workshops, Management Partners facilitated a final workshop with Tustin's executive management to create an Implementation Action Plan, which was incorporated into the strategic plan document.

Client Contact: Mr. Jeffrey Parker, City Manager
300 Centennial Way
Tustin, CA 92780
(714) 573-3300

Ventura County, California

Management Partners has had an ongoing relationship with Ventura County and we have completed a number of assignments for the chief executive as well as individual departments. We facilitated a strategic planning process for the County, involving County executives and elected officials. As part of the process, we interviewed elected and appointed officials, designed and facilitated a one-day workshop, and prepared a workshop report. It was the County's first strategic planning session of its type.

Client Contact: Ms. Elaine Crandall, Deputy County Executive Officer
800 South Victoria Avenue
Hall of Administration, Fourth Floor
Ventura, CA 93009
(805) 658-4342



Fee Proposal and Schedule

The plan of work described above will require 399 hours of consulting work to complete. The total price for this will be \$69,900, which covers our consulting time and expenses. The allocation of hours we are estimating is shown below, along with an estimated fee for each activity. The actual hours by activity may vary, but the total project fee is fixed. In addition to this base fee, we suggest a contingency of \$5,000 for additional meetings, data collection or other components that may be desired by the County. This is often helpful in a strategic planning process.

Activity	Hours	Fee
1. Start Project and Conduct Kick Off Meeting	15	\$3,800
2. Obtain Stakeholder Input	149	\$25,800
3. Prepare Environmental Scan	54	\$7,600
4. Facilitate Strategic Planning Workshop	60	\$12,700
5. Prepare Strategic Plan	96	\$15,800
6. Prepare Implementation Action Plan	25	\$3,800
Total	399	\$69,500
Suggested Contingency		\$5,000

A draft schedule is attached to this proposal. The schedule will be refined and finalized during the kick off meeting.

Conclusion

As always with Management Partners’ work, the ultimate test of a quality project is that the client is pleased with the results. We are committed to achieving that goal. If you have questions about this proposal, please contact either Jan Perkins at 949-202-8870 or me.

Sincerely,



Gerald E. Newfarmer
President and CEO

Accepted for the County of Monterey by:

Name: _____

Title: _____

Date: _____



