

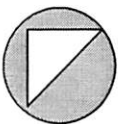
Proposal for:

***Leadership and
Strategic Planning
Workshop***

for

Mayor and City Council

***Muscatine, Iowa
June 2012***



Lyle Sumek Associates, Inc.
9 Flagship Court
Palm Coast, FL 32137

Phone: (386) 246-6250
Fax: (386) 246-6252
E-mail: sumekassoc@gmail.com

Proposal
Leadership and Strategic Planning
Mayor and City Council
City of Muscatine
June 2012

Program Outcome

- Goals for 2017: Four to six Goals with measurable objectives which become major focus areas for the City of Muscatine
- Plan 2012 – 2017: A Plan to achieve the Goals with an analysis of major challenges and opportunities and specific actions
- **ACTION AGENDA FOR 2012 – 2013**
 - Policy Agenda for 2012 – 2013: A Top “10” list of Top and High Priority policy related actions for the Mayor and City Council to address during the next year
 - Management Agenda for 2012 – 2013: A Top “10” List of Top and High Priority management administrative actions for the next year
 - Major Projects for 2012 – 2013: A list of key projects to be completed or requiring significant work for the next year
 - Action Outlines 2012 – 2013: For prioritized actions including activities/milestones, timeframe, responsible party/team
- **MAKING THE STRATEGIC PLANNING PROCESS WORK FOR THE CITY OF MUSCATINE**

Institutionalizing the process in the governance process and the organization

 - Progress Matrix or Status Reports
 - Marketing the Plan
 - Incorporation into Policy Reports, Budget Plan Development, Program Development, Project Planning

Program Outline

ACTIVITY 1: Strategic Planning Outline for the City of Muscatine

The consultant will consult with the Mayor and City Administrator to finalize purposes, work products, activities, and time frames.

ACTIVITY 2: Mayor, City Council and City Administrator Background Interviews

The Consultant will interview the Mayor, each member of the City Council, the City Administrator and possibly key managers. The purpose of each interview is to:

- Gain background on the City of Muscatine
- Identify Goals for 2017
- Identify and discuss issues today and opportunities on the horizon
- Focus on key topics for the Workshop

During the interview, the questions are likely to explore the following information:

1. During the past year, what are the major successes for the City of Muscatine?
2. What did not get accomplished this past year or is in progress and needs to continue for the next year?
3. As you talk with residents, what are their messages to you about issues today and desires for the future?
4. As you look to the future, what are the major challenges facing the City of Muscatine?
5. What do you believe are the most important 5-year goals for the City of Muscatine?
6. During the next year, what are the specific, major issues that you feel need to be addressed by the City of Muscatine?
7. What are the three most important things for you to get done during next year?
8. What other topics do you feel need to be addressed during the workshop?

Additional questions are likely to be added to this list based upon further discussion.

ACTIVITY 3: Leadership and Strategic Planning Session 1 for Management Team

A one-day Leadership and Strategic Planning Workshop will be held. The purpose of this session is to:

- Provide background on Strategic Planning
- Review accomplishments from the past year
- Focus on five-year Goals for City of Muscatine
- Identify specific actions for 2012 – 2013
- Identify topics for Mayor and City Council Workshop

The specific agenda will be developed and submitted to the City Administrator. The Workshop should be flexible, adjusting to your needs, and should be fun in order to maximize the learning experience.

ACTIVITY 4: Interview Analysis and Preparation of Leader's Guide 2012 – A Working Document

The Consultant will analyze the interview data and prepare a summary of:

- Departmental Worksheets: 2012 – 2013
- Working Draft Goals for 2017 with Objectives
- Potential Targets for Action 2012

These drafts will be placed in a Leader's Guide – A Working Document that will be used and modified during the Mayor and Council Workshop.

ACTIVITY 5: Leadership and Strategic Planning Workshop for Mayor and City Council

A four to six hour Leadership and Strategic Planning Workshop will be conducted for the Mayor, City Council and City Administrator. The specific agenda will be developed based upon interviews. A typical outline for a Leadership and Strategic Planning Workshop follows:

1. Success Leaders + Winning Teams = Great Cities
2. Strategic Planning for City of Muscatine
3. Performance Report 2011 – 2012
4. Looking to City of Muscatine's Future:
 - *Mayor and City Council Perspective*
 - *Management Perspective*
5. Plan 2012 – 2017 with Goals, measurable Objectives, Value to Residents and Actions (short/long term)

6. Action Agenda 2012 – 2013: Top Priority, High Priority
7. Making the Strategic Planning Process Work for City of Muscatine

ACTIVITY 6: Final Reports for the Mayor, City Council and City Administrator

As a follow-up to the workshop, the following reports will be prepared for the Mayor, City Council and City Administrator:

- Performance Report for 2011
- Strategic Plan 2012 – 2017
- Executive Summary 2012 – 2017
- Leader's Guide 2012 – Summary Report

These reports become working documents for the next year.

ACTIVITY 7: Follow-up Strategic Planning Session II for Management Team (Optional)

A one-day Workshop is suggested for the Management Team. This workshop will focus on:

- Implementing the Vision 2027 and Goals 2017 in the department
- Developing an Action Plan Outlines
- Developing a process for monitoring short-term Actions
- Monthly reports to the Mayor and City Council
- Quarterly updates to the Mayor and City Council
- Exploring ways to work effectively with the Mayor and City Council – to help them to be successful

STRATEGIC FRAMEWORK

VISION 2027
*“Desired Destination for the
City of Muscatine”*

PLAN 2017
“Map to the City of Muscatine’s Destination”

EXECUTION
“Route for Next Year”

MISSION
“Responsibilities of the City of Muscatine”

BELIEFS
“How the City of Muscatine Should Operate”

STRATEGIC FRAMEWORK BASIC ELEMENTS

VISION

**“What We Want to Become –
Our Preferred Future as Defined in Value-Based Principles.”**

PLAN

**“Our Road Map for 5 Years – How to Realize Our Vision with
Achievable Goals Defined Through: Objectives, Meaning to
Our Residents, Challenges and Opportunities, Actions 2012,
Major Projects 2012 and Actions on the Horizon.”**

EXECUTION

**“Actions to Implement the Plan – A Work Program for Next Year
with a “To Do” List for Mayor, City Council and Management – To
be Completed with Accountability for the Results.”**

MISSION

**“Purposes of City Government – Determined in Service Businesses
Defined in: Operating Elements, Business Successes, Challenges and
Opportunities and Service Improvements 2012.”**

BELIEFS

**“Our Core Beliefs Which are the Foundation for Our City
Government – Creating a Corporate Culture of Action and
Accountability, the Primary Value, As Defined in Performance
Standards to Guide Behaviors and Actions.”**

HOW WE CONDUCT OUR BUSINESS

Consultant Resume and Qualifications

Lyle J. Sumek, President
Lyle Sumek Associates, Inc.
9 Flagship Court
Palm Coast, Florida 32137-3373
(386) 246-6250

Academic

A.B. in Public Administration, San Diego State College, 1967
M.S. in Public Administration, San Diego State College, 1968
Ph.D. in Public Administration, University of Southern California, 1977

Local Government

Management Intern, City of San Diego, 1965
Management Assistant, City of San Diego, 1965 – 1968
(Fire Department, Public Works Department, City Manager's Office)

University Teaching

Instructor, University of Southern California, 1970 – 1972
Assistant Professor, Northern Illinois University, 1972 – 1973
Associate Professor and Assistant Dean (Boulder Campus),
University of Colorado, 1973 – 1979

Consulting Services

President, Sumek Associates, Inc. (a Colorado Corporation), 1979 – 1991
President, Lyle Sumek Associates, Inc. (a Florida Corporation), 1991 – Present

Publications

Numerous Publications on Leadership, Strategic Planning, Team Building and
Aligning the Corporate Culture – High Performance Organization Accountable
for the Results

References

City of Delray Beach, Florida

David Harden, City Manager
100 NW 1st Avenue
Delray Beach, FL 33444
(561) 243-7010

City of Dothan, Alabama

Mike West, City Manager
126 N. St. Andrews Street, Suite 201
Dothan, AL 36303
(334) 615-3120

City of Westminster, Colorado

Brent McFall, City Administrator
4800 W. 92nd Avenue
Westminster, CO 80031
(303) 650-0173

Town of Clayton, North Carolina

Steve Biggs, Town Manager
111 E 2nd Street
Clayton, NC 27520
(919) 553-5002

City of Ankeny, Iowa

Carl Metzger, City Administrator
410 W. 1st Street
Ankeny, IA 50023
(515) 965-6407

City of Bettendorf, Iowa

Decker Ploehn, City Administrator
1609 State Street
Bettendorf, IA 52722
(563) 344-4007

City of Virginia Beach, Virginia

James K. Spore, City Manager
2401 Courthouse Drive
Building 1, Room 234
Virginia Beach, VA 23456-9001
(757) 427-4242

City of Dubuque, Iowa

Mike VanMilligen, City Manager
50 W. 13th Street
Dubuque, IA 52001
(563) 589-4110

Town of Jupiter, Florida

Andy Lukasik, Town Administrator
210 Military Trail
Jupiter, FL 33458
(561) 561 741-2222

Town of Normal, Illinois

Mark Peterson, Town Manager
100 E Phoenix Avenue
Normal, IL 61761
(309) 454-9501

City of Johns Creek, Georgia

John Kachmar, City Manager
12000 Findley Road, Suite 400
Johns Creek, GA 30097
(678) 512-3350

City of Clive, Iowa

Matt McQuillen, Assistant City Manager
1900 NW 114th Street
Clive, IA 50325
(515) 223-6220

Fee Estimate

Leadership and Strategic Planning

City of Muscatine

June 2012

ESTIMATED BILLING TIME:

Number of days scheduled is flexible and is based on the needs of the City.

| | | |
|-----------------------------------|--|----------|
| ACTIVITY 1 | Strategic Planning Outline for the City of Muscatine _____ | ¼ Day |
| ACTIVITY 2 | Mayor, City Council and City Administrator Background Interviews ____ (1 hour per person, in person or by phone, billed at actual time) | 1½ Days |
| ACTIVITY 3 | Leadership & Strategic Planning Session I for Management Team _____ Preparation 2 hours Session 8 hours Report 2 hours | 1½ Days |
| ACTIVITY 4 | Interview Analysis and Preparation of Leader's Guide 2012 – A Working Document _____ | ½ Day |
| ACTIVITY 5 | Leadership & Strategic Planning Workshop for Mayor & City Commission _____ Preparation 2 hours Workshop 10-16 hours Follow Up 2 hours | 1¼ Days |
| ACTIVITY 6 | Final Reports for the Mayor, City Council and City Administrator _____ | ½ Day |
| Total Estimated Time _____ | | 4-5 Days |

** Cancellation/unavailability of individuals may result in additional charges*

** Additional modifications to proposal may increase the pricing*

CONSULTATION FEES:

Individual consultation _____ \$ 200.00 per hour
_____ \$1,600.00 per day on-site
(8 hours)

The typical cost is \$6,400 - \$8,000 to completion + expenses + products.

EXPENSES: _____ Additional Costs

Including, but not limited to:

- *Airline Tickets*
- *Travel/Auto Expenses*
- *Telephone/Fax (billed at \$12.00/hr.)*
- *Assessment Instruments*
- *Accommodations and Meals*
- *Typing, Duplication, Binding, Shipping*
- *Products:*
 - *Strategic Plan (coil bound)*
 - *Executive Summary (booklet)*
 - *Leader's Guide Summary Report*
 - *Performance Report*