Proposal
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City of Minot
North Dakota

Executive Leadership Team Facilitation Services

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A. BACKGROUND AND UNDERSTANDING

1. TRENDS – “HEADWINDS OF CHANGE”

Taking control of uncertainty and successful steering the organization and community through frequent bends in the road is the fundamental leadership challenge of our time. And it will call for a distinctly different type of leadership than traditionally expected. The advantage now goes to those who don’t just learn to live with change, but who create change and fashion themselves as catalysts.

Resources are no substitute for resourcefulness. The gap between the knowledge, critical thinking, problem-solving, and creativity needed to survive the challenges and exploit new opportunities, and the insistence on doing things as they’ve always been done is referred to as the imagination gap. If your organization thinks of itself only as a government, it behaves in only one way. But if it begins to think of itself as a community builder, quality of life advocate and service provider, then it starts to behave differently.

Convening members of the Executive Leadership Team (ELT) in a group development process to focus on the improvement of individual employee performance and overall organizational effectiveness, is beneficial. A focused and robust process will fortify relationships among members and increase a shared understanding about the future of Minot and the ELT’s unique contribution in realizing it.

There are abundant challenges inherent in managing a workforce composed of multiple generations (in some case, five generations working alongside each other, with differing styles and experiences (e.g., different levels of familiarity with technology, etc.). There are also the concurrent challenges that this heterogeneous, amorphous workforce represents in terms of wants, needs, and ongoing employer-employee “contracts.”

Based on research recently completed, there are a number of forces shaping the future of work:

☑ Technological Change
  - New technologies that replace human labor, threatening employment (such as driverless trucks).
  - New technologies that augment or supplement human labor (for example, robots in health care).
  - Sudden technology-based shifts in customer needs that result in new business models, new ways of working, or faster product innovation.
  - Technology-enabled opportunities to monetize free services (such as Amazon web services) or underutilized assets (such as personal consumption data).
Growing Demand for Skills
- General increase in the skills, technical knowledge, and formal education required to perform work.
- Growing shortage of workers with the skills for rapidly evolving jobs.

Changing Employee Expectations
- Increased popularity of flexible, self-directed forms of work that allow better work-life balance.
- More widespread desire for work with a purpose and opportunities to influence the way it is delivered (for example, greater team autonomy).

Shifting Labor Demographics
- Need to increase workforce participation of underrepresented populations (such as elderly workers, women, immigrants, and rural workers).
- Each day, 10,000 people turn 65 years of age. Baby boomers, who now account for 46 million workers in the U.S. workforce, are retiring in droves and taking critical skills and knowledge with them. Each year, more than 4 million baby boomers leave the workforce. This trend is expected to continue well into the next decade, resulting in a massive “brain drain.”

Transitioning Work Models
- Rise of remote work.
- Growth of contingent forms of work (such as on-call workers, temp workers, and contractors).
- Freelancing and labor-sharing platforms that provide access to talent
- Delivery of work through complex partner ecosystems (involving multiple industries, geographies, and organizations of different sizes), rather than within a single organization.

Evolving Business Environment
- New regulation aimed at controlling technology use (for example, “robot taxes”).
- Regulatory changes that affect wage levels, either directly (such as minimum wages or Social Security entitlements) or indirectly (such as more public income assistance or universal basic income).
- Regulatory shifts affecting cross-border flow of goods, services, and capital.
- Greater economic and political volatility as members of society feel left behind.

2. Changing Role of Leaders and Managers

During these times of unprecedented and disruptive change, leaders at all levels of government must improve their ability to manage a perplexing paradox - how to stay focused on today's operations, services and program while building tomorrow's. This is
the “next 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 activate transformational change - modify key rules of the game, reshape parts of the organization, and redefine the work people do.

These evolving circumstances has created a shifting role for leaders and managers.

<table>
<thead>
<tr>
<th>Role Changes for Leaders/Managers</th>
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<tr>
<td><strong>Past</strong></td>
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<tr>
<td><strong>Manage</strong> – Oversees the organization’s use of human resources.</td>
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<tr>
<td><strong>Control</strong> – Uses power and authority to reach desired outcomes.</td>
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<tr>
<td><strong>Direct</strong> – Instructs others on action to take.</td>
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<tr>
<td><strong>Risk Avoidance</strong> – Is reluctant of consequences for making decisions or taking actions outside of the “norm.”</td>
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<tr>
<td><strong>Individual</strong> – Seeks individual credit.</td>
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<tr>
<td><strong>Information Owned</strong> – Believes knowledge is power.</td>
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<tr>
<td><strong>Delegate</strong> – Assigns duties and tasks.</td>
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Few forums can have as powerful an effect on building trust, increasing a shared understanding about roles and responsibilities (i.e., lanes and expectations) and overall, clarifying individual roles and group effectiveness as a well-executed Advance (as opposed to a retreat) session.

The Mejorando Group is uniquely qualified to provide facilitation services for the City of Minot. **We are experts at striking a healthy balance between our two roles: content and process.** Based on our in-depth experience of local government and our extensive record of consulting with other governments we can provide substantive content to organizational leaders as they seek practical and imaginative solutions.
This one-day workshop will be delivered via a blend of facilitation and training.

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 to apply them to their day-to-day activities. We build in methods to transfer the training and new behaviors out into the workplace, through the use of action planning, and examples and exercises from participants’ work/life. We firmly believe the combination of factors including training content, purpose of the particular training, the methods used, the material itself, the delivery mechanism, the facilitator, the participants, the environment, and the evaluation, must be aligned and comprehensive for the training to be effective.

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

- Pre-workshop reading
- Case studies
- In-session written assignments
- Self-Assessments
- Small group discussions
- Partner exercises

Our delivery methods maximize the use of effective learning principles and balance the needs created by a variety of participants learning styles. The goal is for participants to master the knowledge, skills and behaviors emphasized in the training program and to apply them to their day-to-day activities. We build in methods to transfer the training and new behaviors out into the workplace, through the use of action planning, and examples and exercises from participants’ work/life.

The Scope of Services includes the following:

1. **Meet (by telephone) with the City Manager and department directors** to obtain their perspectives about a variety of issues that will/may serve as the focus of the Advance meeting. Conferring with key stakeholders prior to the actual Advance meeting can be quite beneficial in generating positive support for the meeting, as well as to better determine which issues should be addressed at the meeting. Based on this discussion, a tentative agenda for the meeting will be prepared and reviewed for final adoption.
2. **Design and facilitate a one-day Advance session with the City Manager and Department Directors.** The framework recommended for activities at the Advance session is the “Six Realms of Leadership” members of the executive leadership team operate in: 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.

At this time, while the actual agenda for the meeting has not been drafted, the following is a **general outline** as used in similar situations.

- **“Leadership during Uncertain Times.”** View brief clip from documentary film “Lewis and Clark: The Corps of Discovery” to explore a version of leadership and applicability to the City of Minot. (The arts, and this clip in particular, are effective at challenging people’s assumptions and illuminating their perspective about their role in challenging and unpredictable environments).

- **“Change as a Process, not an Event”** – Examine the various trends impacting the role of government, the City in general, and the departments in particular, and discuss ways to translate the headwinds of change into a tailwind. (Always beneficial to begin these sessions with a look into the crystal ball).

- **“Public Servants – Past, Present and Future”** – The scrutiny applied by members of the general public and elected officials to those who chose a career in public service continues to intensify. The group will explore the ecosystem in which public service is evolving and identify what needs to be preserved (the ‘roots’) and what needs to be changed (the ‘anchors’ weighing down progress). (A relevant subject to explore as the role of government is magnified.)

- **“Ingredients for a Successful Service Organization (SSO) and How Are We Doing?”** In this exercise, the seven ingredients which comprise a public-sector SSO will be shared, and a discussion will ensue about how well the organization is performing against that criteria. (Designed to get participants to do some deep thinking about the organization’s current level of performance and potential for improvement).

- **“Profile of a successful CEO (Chief Example Officer)”** - Identify and discuss the competencies which are essential to a member of the Executive Leadership Team achieving success and how they can be utilized to groom potential successors. (Raises self-awareness about one’s strengths and areas for improvement)
• **Leadership: Horizontal and Vertical** – Discussion about the ever-expanding requirements of those attending about their respective roles delivering department services (vertical) along with partnering with peers in other departments and as a member of the Executive Leadership Team (horizontal). (Purpose is to expand the aperture of members about their role on the ELT).

• **“The Leadership Equation”** – An examination of the three components which comprise the Leadership Equation: Believability, Credibility, and Trust. (Reminds people that trust is the currency in every healthy relationship and in the workplace, cultivating trusting partnerships is mission-critical).

• **Stages of Group/Team Development** – The executive team is a formal group/team, and as such will experience five stages of development: 1) Exploring; 2) Testing; 3) Harmonizing; 4) Individuating; and 5) Performing. In this segment, each of these stages will be described accompanied by a group discussion. (Based on comments you shared, it seems the group examining themselves by looking in the mirror will be beneficial as a means to raise individual and collective self-awareness.)

• **Characteristics of Effective Groups** - Characteristics of Effective Groups will be shared and discussed. (Traditional team-building activity to help the group move forward and adopt practices reflective of a healthy team.)

• **Purpose Check**: In this activity each participant writes the team’s (i.e., Executive Leadership Team) purpose on a small Post it Note and post what they have written on the flip chart paper along the wall. Purpose statements should be no more than one sentence. When everyone has posted a purpose statement, participants visit the wall and review those statements on the wall and write down what they believe are the common themes. (Serves to clarify expectations among group members about the intent and function of the ELT. These will be their words, not mine or yours. Will provide a set of principles to reference going forward).

• **“The Minot Way and Six Ways Organizational Culture affects Employee Motivation”** – Participants discuss the three motives which increase employee performance and the three which reduce it and explore how these apply to the City’s workplace culture. (Excellent device to examine the anatomy of the various cultures and subcultures present in the workplace and explore methods leaders as catalysts can utilize in adapting the culture to shifting times).
• “Future Ready” – Based on the articles - “Organizing for the Future” by McKinsey and Company” and mine “Innovating Your Future” – participants will respond to the question – “Is Minot changing as fast as the world around us? Participants will consider what modifications are needed to refresh the city’s “recipe for success.” (Superb thought-provoking activity to translate the forces for change into a tailwind.)

Patrick will facilitate the meeting by utilizing an approach that encourages the full participation of attendees, creates a relaxed and productive meeting environment, and keeps the group on-track with accomplishing agreed upon objectives.

The outcome of the Advance meeting is for members to create a consensus on the future challenges confronting the organization and the role the ELT plays in responding to current and potential challenges/issues. Moreover, there will be tools and techniques members can use to operationalize the take-aways from the various exercises into their daily work, staff meetings and overall, strengthen the importance of performance within the workplace culture.

C. Fee

The Fee to provide services is $7,500 plus reimbursement for travel related expenses,

D. Dates Available

Dates available for a one-day in-person Advance session with Executive Leadership Team:

- Friday, July 9th
- Friday, July 16th
- Friday, August 6th
- Tuesday, August 17th
- Wednesday, August 18th
E. RELEVANT EXPERIENCE

The following is a small sample of relevant experience.

City of Banning, California (pop. 31,253)

In October of 2020, designed and facilitated a Leadership Development Advance workshop with members of the Executive Leadership Team. The purpose was to fortify a recently assembled executive team, help clarify a shared direction including creating leadership principles.

City of San Marcos, Texas (pop. 63,071)

In 2018, with a newly appointed city manager, Patrick designed and facilitated an advance session for the executive leadership team resulting in stronger relationships and clarity about roles and responsibilities.

City of Ontario, California (pop. 175,841)

In 2019 and again in 2020 designed and facilitated a Leadership Development Advance meeting with members of the Executive Leadership Team. The purpose was to fortify a recently assembled executive team, help clarify a shared direction including goal setting.

Town of Queen Creek, Arizona (pop. 33,752)

In 2012, 2015, 2017 and 2018 designed and facilitated a full-day Advance meeting of executive team members that was focused on leadership development.

City of Patterson, California (pop. 22,124)

In 2019, designed and facilitated a Leadership Development Advance meeting with executive leadership team members. The intent was to create a shared commitment of a newly formed executive team and sharpen the individual and collective focus on the future.

City of Glendale, California (pop. 200,831)

Starting in 2016 and through 2018, designed and facilitated a two-day Leadership Development Advance session with the city manager and members of the executive leadership team. The focus is/was to sharpen the focus of each member individually and the group collectively in building a higher performing organization.
F. Qualifications

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

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

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

The Mejorando Group is comprised of professionals that have served as executives and managers in organizations from both the public and private sector, and together have several years of experience working in all aspects of local government management. 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 immediate connection with your organization’s employees.

Our full range of services includes the following:

- **Group Facilitation** – 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:**

  o **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.

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

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

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

  o **Mentoring Programs** – We design and implement award-winning Mentoring Programs that reflect an organization’s culture and match leaders as mentors with those employees interested in accelerating their performance and career trajectory.
- **Knowledge Transfer** – We provide leading edge practices enabling organizations to effectively transfer high value tacit knowledge essential for business continuity. Knowledge Transfer is a rapidly growing occurrence within forward-thinking organizations concerned about the mitigating the impacts of the departure of seasoned employees.

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

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

Ours is a virtual consulting firm in which we blend our expertise and experience with that of other boutique-type firms to benefit our clients. This arrangement generates multiple dividends, including the application of extensive subject-matter experts and seasoned organizational development practitioners combined with the vast experience and expertise of former local government executives. Together, we help to effectively disrupt the status quo and bring leading-edge solutions to improve employee performance and organizational effectiveness.

Beyond our [website](#) which provides general information on our firm, services we provide, list of clients, and resources such as articles we have authored, we are extremely active in social media, providing relevant and timely content to those persons who are vigilant about “getting better all the time.” Finally, periodically we author an e-newsletter, “Moving Forward” distributed to over 4,000 public sector professionals providing a path forward through the turbulent times impacting government.
Patrick Ibarra  
Co-Founder and Partner, The Mejorando Group

As co-founder and partner, Patrick Ibarra is responsible for Talent Management (i.e., Workforce and Succession Planning), Strategic Planning Processes and Facilitation and Organizational Effectiveness services. As a Consultant and Manager in both public and private sector organizations, *including as a city manager and human resource director*, Mr. Ibarra brings organizations over 35 years of experience and a shared understanding of the particular demands and constraints placed on organizations and their employees.

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

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

**Employment History**

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

**Education**

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

- “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
- “Every Employee is a Chief Experience Officer” November 2019 issue of Public Management by ICMA
- “How to Create a Performance-Driven Workforce” July 2019 issue of Public Management by ICMA
- “Drivers of High Performance - Pay Attention to Your Rock Stars” April 2019 issue of Public Management by ICMA
- “Must Reads for Leaders – Part 2” December 2018 issue of Public Management by ICMA
- “Must Reads for Leaders - Part 1” September 2018 issue of Public Management by ICMA
- “Team Builders: New Approaches to Creating the Next Government Workforce” July/August 2018 edition of City Voice published by the Association of Washington Cities
- “Quality Government” June 2018 issue of Public Management by ICMA
- “The Recipe for Success” March 2018 issue of Public Management by ICMA
- “The Future of Leadership Has Arrived” February 2018 issue of Texas City and City published by the Texas Municipal League
- “Crafting a Healthy Workplace Culture” November 2017 issue of Public Management published by ICMA
- “The Changing Workplace” June 2017 issue of Public Management published by ICMA
- “Curating a Healthy Workplace Culture” June 13, 2017 issue of Governing.com
- “Make CLEAR Your Path?” March 2017 issue of Public Management published by ICMA
- “17 Local Government Predictions for a Successful 2017” published by ICMA
- “Building a 21st Century Workforce” December 2016 issue of CSMFO Magazine published by the California Society of Municipal Finance Officers
- “Cultivating Creative Leadership” December 2016 issue of Public management published by ICMA
- “Six Ways to Engineer Public-Employee Engagement” November 29, 2016 issue of Governing.com
- “Mission Critical Mentoring” September 2016 issue of Public Management published by ICMA
- “Building Governments Employer Value” August 16, 2016 Issue of Governing.com
- “How Fit are you to Advance?” June 2016 issue of Public Management published by ICMA
- “Getting More Value out of the Government HR Department” May 11, 2016 issue of Governing.com
- “Talent Management” March 2016 issue of Public Management published by ICMA
- “Next Generation Professionals: An Inside Look at What Matters to Them” August 2015 issue of Public Management published by ICMA
- “Career Management in the 21st Century” Texas City and City February 2015 issue
- “Retaining A+ Performers in the Finance Department” February 2015 issue of Government Finance Review published by the Government Finance Officers Association
- “What Government can learn from the Culture of Apple” January 20, 2015 issues of Governing.com
- “How Governments Can Hold onto Their Top Performers” October 1, 2014 issue of Governing.com

**Conference Presentations - 2021**

- California Municipal Treasurers’ Association
- California State Association of County Auditors
- International City/County Management Association Regional Conferences
- IPMA-HR, Virginia chapter
- Minnesota City/County Management Association