



mejorando group

Proposal

August 30, 2024



CITY OF SAN PABLO

City of New Directions

Facilitation Services

Submitted By:

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August 30, 2024

Matt Rodriguez
City Manager
City of San Pablo

Dear Matt:

On behalf of the Mejorando Group, I am pleased to offer a proposal to continue our partnership in helping ensure the governing body has a shared vision in their pursuit of building a stronger San Pablo community.

Goa/priority-setting is a process to toggle between being responsive and proactive while recognizing the limited capacity for City finances and staff time. It's a process to enhance the quality of life for your residents and operationalizing intent into action. A **brief summary** of my approach includes obtaining input from stakeholders (i.e. members of the governing body) and guiding them through a process during which the Mayor and Council can establish a shared understanding about each member's perspectives about the future of City of San Pablo, foster trust among the group and with the executive leadership team, examine emerging trends, reaffirm the mission, and adopt new policy updates for the FY 2024-2026 City Council Priority Workplan.

Please contact me at 925-518-0187 or via e-mail at patrick@gettingbetterallthetime.com with any questions.

Sincerely,



Patrick Ibarra
Co-Founder and Partner
The Mejorando Group



A. BACKGROUND AND UNDERSTANDING

Organizations, such as the City of San Pablo, are continually presented with unexpected opportunities and unanticipated problems. Hard choices must be made, sometimes quickly, often under conditions in which little is certain; in particular, the challenges resulting from the COVID-19 pandemic. It can be easy to become distracted by these challenges expending time, money, and energy on activities that divert people's attention from the organization's principal goals. To avoid these distractions, organization members – including staff from top to bottom – need to understand clearly what the organization's goals are and what it will take to achieve them.

Local governments directly affect the daily existence and quality of life for residents within the community. Political leadership of local government is about making things happen that might not otherwise happen and preventing things from happening that ordinarily might happen. It is a process that helps transform intentions into positive actions, visions into reality. In their role as community builders, San Pablo leaders have adopted a Priority Work Plan that features a mission and major policy goals (which includes specific priorities within each goal) as the foundation of their success architecture intended to help focus time, attention, and efforts:

Mission Statement

Dedicated to developing, preserving, and protecting the quality of life and cultural diversity for all its residents, while maintaining high quality public services in partnership with our citizens.

Five Major Policy Goals (MPGs):

- Economic Development and Diversification*
- Expand Housing Options*
- Enhance Community Resilience*
- Build a Healthy Community*
- Improve Public Safety*

Convening members of the governing body is beneficial, especially with one new member joining the group. Few forums can have as powerful an effect on building trust, increasing a shared understanding and overall, enhancing relationships as well-executed Advance (as opposed to a retreat) session that focuses on both group development and goal/priority-setting for the short- and long-term. With suitable planning, these gatherings can re-energize and re-focus a governing body.

There are several purposes for holding these types of meetings.

- Policy makers and senior City staff participate in collegial discussions about the future of San Pablo.
- To refresh the mission as the foundation for reaffirming priorities for the foreseeable future.
- Examine the roles (i.e., lanes) and clarify expectations of the Mayor, Councilmember, City Manager, department directors, City staff and community members.
- Fortify relationships among elected officials to ensure clarity necessary to achieve success.
- A shared understanding is reinforced between the governing body and executive management enabling clarity and cohesion about priorities (i.e., key goals and objectives) and time commitments for the foreseeable future.
- To enable members of the executive leadership team to coalesce in their collective efforts to manage the organization.
- To craft a unified approach to building a stronger, more vibrant, and prosperous community.

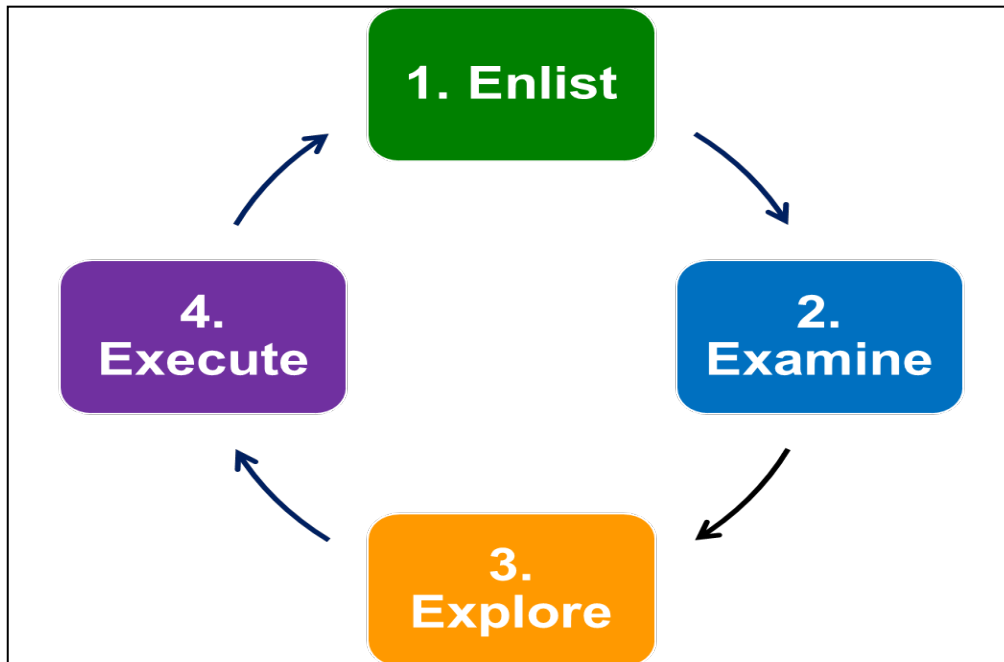
More than a project, goal/priority-setting serves as a catalyst to shepherd precious resources towards the desired goals. Indeed, for any organization, the ability to concurrently run the business (i.e., government is in the business of public service) and reinvent it has become a determinant of long-term success.

Increasingly, local governments are reconsidering their approach to goal setting by referencing the following shift in mindset:

Old Mindset	Modern Mindset
<ul style="list-style-type: none"> • Adoption of the plan is the strategy. • Change is dangerous. • An event. • Wish list – the longer the better. • Assumption that existing advantages will persist. • Community is static • Conversations that reinforce existing perspectives. • Precise but slow. • Prediction oriented. • Seeking confirmation. 	<ul style="list-style-type: none"> • Execution is the strategy. • Stability is dangerous. • A process. • Prioritize list – less is more. • Assumption that existing advantages will come under pressure. • Community is dynamic • Conversations that candidly question the status quo. • Fast and roughly right • Discovery driven • Seeking disconfirmation

B. WORK PLAN

Our work plan merges the experience and insight from key stakeholders along with a reliable process and the capable facilitation and consulting services from the Mejorando Group. Our Approach is based on the **Four E's**:



- 1) **Enlist** (prior to the advance/retreat) key stakeholders by obtaining their input about expectations for the process and topics/areas to be strongly considered at the gathering of the group.

At the retreat/advance:

- 2) **Examine** – the focus of this segment of the session is to examine the role of local government in general, City of San Pablo in particular, discuss the foundations of healthy governing bodies in their pursuit as community builders, refresh roles/lanes as segments of the Council-Manager form of government, reaffirm the role and value of priority-setting and examine the impacts from emerging trends.
- 3) **Explore** – the intent of this segment of the workshop/session is to explore the future of the community by refreshing the mission and identifying critical goals and objectives to consider for the next year.

The City Manager, working with senior staff, though not during the actual Advance workshop but afterward, will then add a proposed schedule (including a

progress update timetable) for each item identified in the draft strategic plan and within thirty days, provide it for the governing body to consider. At that time, any adjustments will be made, and the draft should be transitioned into final version for the creation of a Strategic Plan.

- 4) **Execute** – Implement the Top Priorities and provide periodic progress updates.

1. Enlist - Obtain Input

- 1) Essential to ensure the content of the process is aligned with the expectations of members of the governing body, individual interviews/meetings will be held with each member of the governing body and the City Manager. The purpose of each one-on-one meeting is to elicit their perspectives about a variety of issues that will/may serve as the focus of the retreat/advance, specifically their expectations, opinions about past efforts at creating strategic plans and identifying goals he/she would like to be accomplished in the next few years.

2. & 3. Examine & Explore Design & Facilitate Advance Workshop

- 2) **Facilitate a half-day Advance Workshop involving members of the governing body, City Manager, and department directors.**

While the input has not yet been gathered for this process, here is a sample agenda from previous sessions with other local governments:

- a) Strategies for Creating a More Credible, Effective Governing Body – Discuss the various dimensions essential to ensure sufficient credibility by residents in the governing body.
- b) Refresher on the form of government – Discuss the various roles and expectations of the Mayor, Councilmembers, City Manager, department directors, City staff and community members.
- c) Review Year-End Accomplishments for 2024 and Plans for 2025 – City Manager will provide an update on accomplishments for 2024 and tentative plans for 2025.
- d) “Headwinds: Review external and internal factors” - Similar to an environmental scan, factors will be examined to determine their individual and collective impact on the operations of the City both at the present and in the future. Types of questions that may be asked during this segment may include:
 - What types of services will residents require in the future that are not already provided? What might be required to fund and staff these services?
 - Which City processes and practices might need to change to serve a larger population?

- What types of infrastructure additions or expansions will be required to handle our anticipated growth? What financial resources are required to fund this work?
 - What can we do to make our community more attractive for business expansion or development opportunities?
- e) Refresh the existing Mission – Review the existing Mission and determine if it continues to reflect the mindset/appetite of the Mayor and Council.
- f) “Our Top Priorities” – Revise policy updates for the FY 2024-2026 City Council Priority Workplan, define strategies that enable the achievement of the goals and identification of fiscal constraints and opportunities that affect the achievement of proposed goals. The City Manager will then, working department directors, add more detail such as a proposed schedule and resources necessary and return the draft Plan, within approximately forty-five days, to the Mayor and Council for their consideration and adoption.

4. Execute – Implement

Subsequent to the Advance, the Mejorando Group, partnering with City staff, will produce a written summary that summarizes the Council’s deliberations, including an overview document that lists City Council priorities. Based on the plan adopted by the City Council, implementation will ensue. Periodic progress updates on the various items in the Plan will be provided by the City Manager.

C. OUR APPROACH TO FACILITATION

As a **former city manager** who invested over fifteen years in local government management, and consultant for over sixteen years collaborating with leaders of public-sector agencies nationwide, Patrick Ibarra is extremely effective as a guide and catalyst partnering with groups by utilizing his in-depth understanding about local government operations with a highly interactive, stimulating, and practical approach to group facilitation. The result is a group recommitted to tackling, with a laser-like focus, today's toughest challenges confronting local government leaders.

We refer to the gatherings of elected and appointed officials we design and facilitate as an **Advance** as opposed to a Retreat, the commonly referred term applied to these types of meetings. Our work is aimed at helping governing bodies perform better while satisfying individual needs at the same time.

Our role as **meeting facilitator** is an essential element to a successful process and achieving desired outcomes. These key skill sets reflect our philosophy and approach:

- ✓ Effective facilitation skills and meeting management
- ✓ Extensive knowledge of local government
- ✓ Add value during the discussion and throughout the process
- ✓ Fair, objective, and impartial to all participants
- ✓ Stimulate and encourage discussion and creative ideas

Selection of an experienced facilitator is key as they ensure all points of view are aired and considered. Patrick Ibarra will utilize thought-provoking and relevant exercises to actively engage the group, use consensus decision-making techniques, guide group discussions to stay on track, manage conflict using a collaborative approach, and create an environment where members enjoy a positive, growing experience while they work to attain group goals. He possesses a certification in Facilitation by Development Dimensions International, one of the leaders in the marketplace.

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.

D. FEE

The Fee to provide services (i.e., conduct interviews, design the agenda, and virtually facilitate the Advance meetings) is \$8,200 plus reimbursement for travel expenses.

E. EXPERIENCE AND REFERENCES

Sample of references located in Northern California:

City of Pittsburg, California (pop. 72,141)

Each year since 2019, facilitated a [Strategic Planning](#) session with the Mayor and Councilmembers. The purpose was to help the group coalesce in their governance role and identify priorities for the upcoming year. **Reference:** Garrett Evans, City Manager, 925-252-4034, GEvans@ci.pittsburg.ca.us

City of San Ramon, California (pop. 75,648)

Every year from 2021 to 2023, designed and facilitated a Strategic Planning session with members of the governing body and city manager. The intent was to establish policy goals to serve as the criteria for upcoming budget priorities. **Reference:** Steven Spedowski, City Manager, spedowski@sanramon.ca.gov (925) 973-2632

City of Pinole, California (pop. 18,821)

In 2023, designed and facilitated a Strategic Planning session with members of the governing body and city manager. A new Mayor and Councilmember had been elected and the intent was to help coalesce the group along with establishing priorities in the near and short-term.

City of Antioch, California (pop. 111,200)

In 2021, designed and facilitated a Strategic Planning session with members of the governing body and city manager. A new Mayor and Councilmember had been elected and the intent was to help coalesce the group along with establishing priorities in the near and short-term.

City of San Bruno, California (pop. 43,083)

In 2021, designed and facilitated a Strategic Planning session with members of the governing body, city manager and department directors. The purpose was to help clarify a shared direction including goal setting.

F. QUALIFICATIONS OF THE MEJORANDO GROUP

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.**

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.

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:

- **Facilitation 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** - 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.
- **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.
- **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.

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.

G. PROFILE/RESUME

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 group development and strategic planning in 2021, 2022, 2023 and 2024** for the following cities and counties:

Arizona

1. Chandler (pop. 249,146)
2. Kingman (pop. 29,726)
3. Queen Creek (pop. 66,146) – 2023

California

4. Alhambra (pop. 84,647)
5. Antioch (pop. 111,200)
6. Artesia (pop. 15,944) – 2023
7. Bakersfield (pop. 407,715) – 2023
8. Banning (pop. 30,273) – 2023
9. Claremont (pop. 36,090) – 2024
10. Clayton (pop. 12,083)
11. Coachella (pop. 45,181)
12. Concord (pop. 129,183)
13. Costa Mesa (pop. 110,750) – 2023
14. Fillmore (pop. 16,496) – 2023
15. Kingsburg (pop. 12,662) – 2023
16. Martinez (pop. 38,373)
17. Montebello (pop. 62,742)
18. Monterey Park (pop. 60,439) in 2021, 2022 and 2023
19. Norwalk (pop. 106,084) – 2023
20. Pico Rivera (pop. 64,001) – in 2021, 2022 and 2023
21. Pinole (pop. 18,821) – 2023
22. Pittsburg (pop. 72,141) – 2021, 2022, 2023 and 2024
23. Placentia (pop. 51,274) – 2023
24. San Bruno (pop. 43,083)
25. San Gabriel (pop. 40,108)
26. San Pablo (pop. 31,124) – 2023

- 27. **San Ramon (pop. 75,648) – in 2021, 2022 and 2023**
- 28. **South Pasadena (pop. 26,314) – 2021 and 2023**

Colorado

- 29. Durango (pop. 19,223) - 2021, 2022, 2023 and 2024
- 30. Rifle (pop. 9,650) –2021, 2022 and 2023

Florida

- 31. Pasco County (pop. 584,067) - 2024

Illinois

- 32. Lake Forest (pop. 19,253) - 2024

Kansas

- 33. Hutchinson (pop. 39,712) – 2024

Maine

- 34. City of Augusta (19,066) - 2024
- 35. Franklin County (30,474) - 2024

Michigan

- 36. Ingham County (pop. 284,034) - 2023

Oklahoma

- 37. Bartlesville (pop. 36,412)

Texas

- 38. Argyle (pop. 5,281)
- 39. Arlington (pop. 395,477)
- 40. Carrollton (pop. 135,834)
- 41. Corpus Christi (pop. 325,780)
- 42. Denton (pop. 136,195)
- 43. El Campo (pop. 11,630)
- 44. Flower Mound (78,854)
- 45. Hutto (pop. 30,855) - 2024
- 46. Kyle (pop. 42,706)
- 47. Lewisville (pop. 112,944) – 2023
- 48. Pearland (pop. 125,990) - 2024

Patrick utilizes thought-provoking and relevant exercises to actively engage the group, uses consensus decision-making techniques, guides group discussions to stay on track, manages conflict using a collaborative approach, and creates an environment where members enjoy a positive, growing experience while they work to attain group goals.

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 (recent)

- “Design Thinking and the Consumer Experience” – August 2024 issue 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
- “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