



City of Duluth Planning & Economic Development Team Charter & Effectiveness Series and Department Retreat

Letter of Intent

Employee Strategies | Creating Cultures That Work

Scope of Work

Phase 1: Employee Pulse Survey

Your Employee Pulse survey will serve as a follow-up to last year's Department Culture Assessment and will serve three primary purposes:

- To identify trends in the health and effectiveness of the culture over the last year
- To provide a current baseline picture of the strengths and needs of the department to be used as key inputs in subsequent Team Charter work
- To provide continued insight and direction to other culture-building work being conducted by department leaders, the Culture Team, and others

DELIVERABLES:

- **Updated 2024 Pulse Survey Report with year-to-year comparisons**



Scope of Work

Phase 2: 2024 Department Retreat

Employee Strategies will design, build, and deliver a 1-day Department Retreat for the Department of Planning & Economic Development that serves as kick-off to the Team Chartering Project planned for this Spring.

This retreat experience will have 3 primary objectives:

- To **build healthy and effective relationships** across the department—especially between PED and CSI
- To **generate a wealth of department-wide input** for the Team Charter team to use in their work over the following months
- To ensure that the Team Charter produced by the Team Charter team is on target, relevant, and has **solid buy-in** from the department at large

This retreat experience will combine a variety of strategies to engage participants and generate valuable outcomes:

- Brainstorming and vibrant conversation around the team's shared Goals, Roles, and Rules
- A deeper dive into the Employee Pulse Survey to be conducted in January 2024
- Plenty of time for structured but fun interaction including team challenges, conversation, and direct and indirect problem-solving



Draft Agenda

Phase 2: 2024 Department Retreat

Here is a draft version of what your department retreat agenda may include. The final agenda will be refined through planning sessions with the department director and other key stakeholders.

- Welcome & fun icebreaker activity
- What does an Effective Team look like?
 - Individual reflections and group conversation
 - An Introduction to the Goals, Roles, and Rules framework
- Debrief & discussion centered around the results from the January Employee Pulse Survey
- Goals
 - Inventory of Proudest Moments that point towards our shared Purpose
- Roles
 - Exploration of 4 basic workstyles on your Team and how they may complement each other and how lack of awareness may cause conflict
- Rules
 - Inventory how Duluth's Values Look and Sound on your Team
 - Propose rules to promote collaboration & communication
- Various team challenges and competitions throughout the day



Scope of Work

Phase 3: Team Charter & Effectiveness Series

Your Team Charter and Effectiveness Series will consist of **five ½-day sessions** aimed at enhancing the effectiveness of the CSI/PED team through clarifying team goals, improving communication, enhancing team behaviors, and building relationships.

The series will center around creating a Team Charter—a foundational document that will outline the team's:

- **Goals**—a clear and shared understanding of why the team exists and what measures should be used to judge its success
- **Roles**—the key functional and workstyle roles that all members of the team bring and how best to use those roles in an effective and collaborative manner
- **Rules**—the norms and ground rules that describe how the team operates at its best

DELIVERABLES:

- **Goals**
 - Department Purpose Statement
 - 2024 Objectives
- **Roles**
 - A basic role matrix describing the key contributions of members of the team
- **Rules**
 - Clear expectations around team behaviors including communication processes, problem-solving, and conflict management
 - Translation of the Duluth's Core Values (Better, Bolder, Together) to relevant and specific team behaviors
- **Updated 2024 Pulse Survey Report**



Rough Project Timeline

Event	Timing
Department-wide Pulse Survey	January 8-16
Pulse Survey Leadership Debrief	Jan 30 1-2:30pm
Team Charter Planning Meeting	Feb 1 11-12pm
Present Pulse Survey Results to Employees (Department led)	Feb 6 9-10am
1: Team Chartering Kick-off & Department Retreat : Kick-Off, Pulse Survey Debrief, Vision & Goals	March, TBD
2: Team Chartering: Roles & Rules	March, TBD
3: All-Staff Engagement & Refinement	April, TBD
4: Team Chartering: Issue Solving & Refinement	April, TBD
5: All-Staff Engagement & Finalization	May, TBD
After Engagement Review and Future Planning	TBD

Project Assumptions

Phase 1: Employee Pulse Survey

- Report to include 2 data cuts
 - By division (CSI and PED)
 - By tenure



Project Assumptions

Phase 2: 2024 Department Retreat

- This all-department retreat will be done on the same day and expand on Day 1 of the Team Charter Series previously agreed to. The fee described in this agreement reflects a discount considering the complementary nature of this project to the previously agreed Team Charter project
- The session will be 4-6 hours in length (most likely to be scheduled in March) Team Charter Team session likely will be shortened to accommodate more time for all staff.
- All employee inputs will be recorded and compiled for use in further team chartering work
- A coordinator (Amanda Anderson) will be provided by City of Duluth to help Employee Strategies with project support tasks including:
 - Sending project announcements and calendar invitations to participants
 - Sending a roster of participants to Employee Strategies
 - Booking a space to hold the sessions
 - Printing & supplies
 - Food and beverage (if needed)
- City of Duluth will be responsible for any additional production costs including space rental, printing materials, food & beverage and other supplies as needed.
- Chad Ronchetti and Employee Strategies to have 2-prep meetings that may be done in addition to or expand on planning meetings for the Team Charter project

Project Assumptions

Phase 3: Team Charter & Effectiveness Series

- Half-day sessions will be attended by the same 10-15 leaders/influencers
- Full department will be engaged through all-staff Pulse Survey, All-Staff. Retreat, 1 additional in-person session, and other digital engagement as needed
- A coordinator (Amanda Anderson) will be provided by City of Duluth to help Employee Strategies with project support tasks including:
 - Sending project announcements and calendar invitations to participants
 - Sending a roster of participants to Employee Strategies
 - Booking a space to hold the sessions
 - Printing & supplies
 - Food and beverage (if needed)
- City of Duluth will be responsible for any additional production costs including space rental, printing materials, food & beverage and other supplies as needed.
- Chad Ronchetti and Employee Strategies to have 2 prep meetings & 1 follow-up meeting at the end of the series.

Total Investment

Total investment for all phases: **\$57,500**

- Team Charter & Effectiveness Series + Pulse Survey - \$35,000
- Team Retreat- \$22,500

Terms & Conditions

This Agreement ("Agreement") is entered into on 12/11/2023 by and between Employee Strategies, Inc., a company with an address at 4011 Vincent Ave S., Minneapolis, Minnesota 55410 ("ES") and The City of Duluth ("Client"). This Agreement is effective when accepted by ES.

01 | PERFORMANCE BY EMPLOYEE STRATEGIES

ES agrees to perform those services as described in the Scope of Work as outlined in this document.

02 | PAYMENT FOR SERVICES

Client agrees to pay ES as stated in the Scope of Work. Client will reimburse ES for all travel costs and expenses incurred by ES. Unless otherwise stated and agreed upon in writing for this scope of work, all invoices are due and payable upon receipt. If any amount due hereunder is not paid within thirty (30) days, Employee Strategies shall have the right to charge interest at the rate of ten percent (10%) per annum. ES will issue Client invoices in three installments for each project.

03 | TERM AND TERMINATION

This Agreement shall commence on the date set forth above and shall remain in effect until the work described in the Scope of Work is completed, or until terminated by either party. Unless otherwise agreed, either party may terminate this Agreement at anytime upon fourteen (14) days written notice to the other party of their desire to terminate this agreement. In addition, ES may cease work immediately upon notice to Client if amounts due hereunder are not paid as agreed.

04 | LETTER OF INTENT EXPIRATION DATE

This letter of intent has a 10-day expiration period. Based on our staffing model and dynamic nature of Culture Consulting, we can honor this letter of intent for a 10-day time-period. If you cannot commit to the work at this time, please alert your contact at Employee Strategies.



Acceptance

of Scope of Work and Terms & Conditions

In witness whereof, the parties have executed this Agreement.



Signature

ANDY ZIMNEY

Name

EMPLOYEE STRATEGIES

Organization

PRINCIPAL OD CONSULTANT

Title

December 11, 2023

Date

Signature

Name

Organization

Title

Date

Thank You!





Employee Strategies

Creating Cultures that Work Since 2006

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