

**AMENDMENT TO AGREEMENT
BETWEEN THE COUNTY OF SAN MATEO AND
VIVA STRATEGY + COMMUNICATIONS**

THIS AMENDMENT TO THE AGREEMENT, entered into this ____ day of _____, 20____, by and between the COUNTY OF SAN MATEO, hereinafter called "County," and Viva Strategy + Communications, hereinafter called "Contractor";

W I T N E S S E T H:

WHEREAS, pursuant to Government Code, Section 31000, County may contract with independent contractors for the furnishing of such services to or for County or any Department thereof;

WHEREAS, the parties entered into an agreement on October 6, 2015 for consulting services to operationalize the Human Services Agency Strategic Plan within and across its programs through developing action and implementation plans in the amount of \$187,125 for the term of November 10, 2015 through December 31, 2016; and

WHEREAS, the parties wish to amend the agreement to add funds in the amount of \$81,600 for a new total obligation of \$268,725 to allow for additional consulting services for the development of action and implementation plans for the Finance and Staff Development Branches of the Human Services Agency.

NOW, THEREFORE, IT IS HEREBY AGREED BY THE PARTIES HERETO AS FOLLOWS:

- 1. Section 2. Services to be performed by Contractor** is amended to read as follows:

In consideration of the payments set forth in this agreement and in Exhibit B (revised 5/2016), Contractor shall perform services for County in accordance with the terms, conditions, and specifications set forth in this agreement and in Exhibit A (revised 5/2016).

- 2. Section 3. Payments** is amended to read as follows:

In consideration of the services provided by Contractor in accordance with all terms, conditions, and specifications set forth in this agreement and in Exhibit A (revised 5/2016), County shall make payment to Contractor based on the rates and in the manner specified in Exhibit B (revised 5/2016). County reserves the right to withhold payment if County determines that the quantity or quality of the work performed is unacceptable. In no event shall County's total fiscal obligation under his agreement exceed **TWO HUNDRED SIXTY EIGHT THOUSAND SEVEN HUNDRED TWENTY FIVE**

DOLLARS (\$268,725). In the event that the County makes any advance payments, Contractor agrees to refund any amounts in excess of the amount owed by the County at the time of contract termination or expiration.

3. Exhibit A (revised 5/2016) replaces all other versions of Exhibit A in their entirety and is attached hereto.
4. Exhibit B (revised 5/2016) replaces all other versions of Exhibit B in their entirety and is attached hereto.
5. All other terms and conditions of the agreement dated October 6, 2015, between the County and Contractor shall remain in full force and effect.
6. This amendment constitutes the entire understanding of the parties hereto with respect to matters herein and correctly states the rights, duties, and obligations of each party as of this document's date. Any understandings, promises, negotiations, or representations between the parties not expressly stated in this document are not binding. All subsequent modifications of this amendment or the agreement shall not be effective unless set forth in writing and executed by both parties.

IN WITNESS WHEREOF, the parties hereto, by their duly authorized representatives, have affixed their hands.

COUNTY OF SAN MATEO


By: _____
President, Board of Supervisors, San Mateo County

Date: _____

ATTEST:

By: _____
Clerk of Said Board

VIVA STRATEGY + COMMUNICATIONS



Contractor's Signature

Date: 5/16/16

Exhibit A (revised 5/2016) - Services

In consideration of the payments set forth in Exhibit B, Contractor shall provide the following services:

The Contractor shall develop program-level strategic and implementation plans that include:

- Goals and strategies that have clear performance targets and metrics to measure outcomes and lead the program on a path of program quality improvement
- Assessment and identification of partnership opportunities
- Utilization of industry performance benchmarks (i.e. foster placements, CalWORKS work participation rate)
- Clear articulation to the Agency plan to create a “clear line of sight”

Project Guidance Meetings:

Executive Leadership Kick Off Meeting: At the onset of the project, Contractor will facilitate a Kick Off Meeting with the Human Services Agency Director and the Agency Assistant Director. This meeting is intended to ensure Contractor understands the current landscape as it relates to expectations of this project, and identify any crosscutting indicators that should be included in the resulting project plans.

Project Planning Meetings: Contractor will facilitate 30-minute conference calls with the Agency Assistant Director every other week. These meetings are intended to understand landscape changes and updates, and review and assess project progress.

DELIVERABLES: Program-level Strategic Plans:

| | | |
|---|-----------------------------|--------------------------------|
| (1) Kick Off Meeting | | |
| (a) Children and Family | (b) Economic Self | (c) Employment Services |
| (2a) Workgroup Meeting 1 | (2b) Workgroup Meeting 1 | (2c) Workgroup Meeting 1 |
| (3a) Workgroup Meeting 2 | (3b) Workgroup Meeting 2 | (3c) Workgroup Meeting 2 |
| (4a) Workgroup Meeting 3 | (4b) Workgroup Meeting 3 | (4c) Workgroup Meeting 3 |
| (5a) Staff Survey | (5b) Staff Survey | (5c) Staff Survey |
| (6a) Manager and Supervisor | (6b) Manager and Supervisor | (6c) Manager and Supervisor |
| (7) Trailblazer Meeting | | |
| (8a) Workgroup Meeting 4 | (8b) Workgroup Meeting 4 | (8c) Workgroup Meeting 4 |
| (9a) Workgroup Meeting 5 | (9b) Workgroup Meeting 5 | (9c) Workgroup Meeting 5 |
| (10a,b,c) Cross Program Meeting – Managers Present Draft Plans | | |
| (11a) Workgroup Meeting 6 | (11b) Workgroup Meeting 6 | (11c) Workgroup Meeting 6 |
| (12) Agency-wide Directors and Managers Meeting | | |

Program-level Strategic Plans: Workgroup and Participation Descriptions:

Strategic Planning Leadership Kick Off Team: This group will be comprised of the Agency Assistant Director and Branch Directors who are completing the Program-level strategic planning process. The group will meet for a kick off Meeting prior to the launch of the Program-level strategic planning processes.

Children and Family Services Workgroup: This workgroup will be comprised of the Director of Children and Family Services, and Branch Managers. This workgroup will meet six times throughout the planning process. These meetings may include the Agency Assistant Director, depending on her schedule.

Economic Self Sufficiency Workgroup: This workgroup will be comprised of the Director of Economic Self Sufficiency and Branch Managers. This workgroup will meet six times throughout the planning process. These meetings may include the Agency Assistant Director, depending on her schedule.

Employment Services Workgroup: This workgroup will be comprised of the Director of Employment Services and Branch Managers. This workgroup will meet six times throughout the planning process. Because the Branch Director will be recently hired, it is assumed that the Agency Assistant Director will attend these workgroup meetings.

Program Staff Survey: Contractor will use an anonymous web-based survey of each program's non-management staff to gather staff's perceptions and test emerging Program-level strategic planning concepts. Contractor will develop three surveys, one for each program, and provide a web link for distribution to non-management staff.

Manager and Supervisor Engagement Sessions: Contractor will convene Managers and Supervisors from each program participating in the Program-level strategic planning process. These sessions will aim to review regulatory compliance indicators, indicators of excellence, and customer service. These sessions will be convened one time, for each department, throughout the planning process.

Trailblazers Team: This team is comprised of cross-program representatives who participated in the Agency strategic planning process and who are at or are relatively proximal to the client service delivery point. The group will work to identify community based partnership opportunities and provide feedback on the developing program plan metrics. This group will meet one time during the planning process.

Cross Program Planning Group: This group is comprised of all managers from participating strategic planning branches. This group will meet one time throughout the planning process to give and receive feedback on draft program strategic plans. The managers will also identify areas of shared work, including professional development and partnership opportunities.

Agency Directors and Managers Team: This group is comprised of all Directors and Managers, including the Agency Director. This group will meet one time, at the end of the planning process, to discuss the Agency's clear line of sight and build awareness of the Agency implementation work that focuses on continuous quality improvement.

Program-level Strategic Plans: *Engagement Sequence*

| Engagement | Objectives |
|--|--|
| Leadership Kick Off Meeting | Discuss Leadership goals and expectations for the program strategic planning process |
| <i>This follows the Executive Leadership Kick Off Meeting.</i> | Discuss and refine the program strategic planning processes and key activities Plan for engaging Branch staff in the program strategic planning process |
| Workgroup Meeting 1 | Build manager understanding of the intent and foundation of the Agency strategic plan Inspire managers ownership and engagement in program quality improvement Discuss the program strategic planning processes and key activities Understand perceived and demonstrated program strengths and opportunities Determine workgroup's priorities, structure, and communications preferences |
| Workgroup Meeting 2 | Engage managers as thought partners in program quality improvement related to industry performance benchmarks Map the industry performance benchmarks in the program area Discuss key influencers of industry performance benchmarks Understand managers perceptions of continuous quality improvement related to industry performance benchmarks |
| Workgroup Meeting 3 | Using Agency Strategic Plan Value "Client Experience," discuss and define how the value relates to the program and <i>each industry performance benchmark</i> in language that is specific and measurable (goal, objective, metric) Plan for Staff Survey and Manager and Supervisor Engagement Session |
| Staff Survey | Build on existing strategic planning data to gather non-management program staff perspectives on program strengths and quality improvement opportunities Test emerging program strategic plan concepts |
| Manager and Supervisor Engagement Session | Ensure supervisors understand the framework and intent of the Agency strategic plan Review and discuss the regulatory compliance indicators and indicators of excellence in program area (Workgroup Meeting 2) Review and discuss operationalization of "Client Experience" (Workgroup Meeting 3) |

| | |
|---------------------------------------|--|
| Trailblazer | Identify community based partnership opportunities to achieve shared goals and developing program plan metrics |
| Workgroup 4 | <p>Building upon processes to date, draft comprehensive strategies and measurable metrics for program plan</p> <p>Discuss program workforce skill building required to make progress toward the developing program plan, with a focus on customer service and meeting/exceeding industry performance benchmarks</p> <p>Review Trailblazer identified partnership opportunities</p> |
| Workgroup 5 | Complete the draft program strategic plan including strategies and metrics |
| Cross Program Meeting | <p>Managers across departments give and receive feedback on draft program plans</p> <p>Managers increase ownership of program plan</p> <p>Managers increase understanding of other Agency programs and the interconnectedness of Agency services</p> |
| Workgroup 6 | Managers and Program Director make final refinements to program strategic plan |
| Agency Directors and Managers Meeting | <p>Demonstrate Agency clear line of sight</p> <p>Increase Agency-wide understanding of the interconnectedness of Agency services</p> <p>Build awareness of the Agency implementation work with a focus on continuous quality improvement</p> <p>Celebrate the plans and those that engaged in the process</p> |

DELIVERABLES: Program-level Implementation Plans

| | |
|--|--|
| (1) Kick Off Meeting | |
| Collaborative Community Outcomes | Administrative/Information Services |
| (2a) Workgroup Meeting 1 | (2b) Workgroup Meeting 1 |
| (2a) Workgroup Meeting 2 | (2b) Workgroup Meeting 2 |
| (3a) Workgroup Meeting 3 | (3b) Workgroup Meeting 3 |
| (4) Agency-wide Directors and Managers Meeting | |

Program-level Implementation Plans: Workgroup and Participation Descriptions

Implementation Plan Leadership Kickoff Team: This group will be comprised of the Agency Assistant Director and Branch Directors who are completing the implementation plans. The group will meet for a kick off Meeting at the beginning of the implementation planning process.

Collaborative Community Outcomes Workgroup: This workgroup will be comprised of Branch Staff, or a subgroup of Branch staff to be determined by the Agency Assistant Director and Director of Collaborative Community Outcomes. This workgroup will meet three times throughout the planning process. These meetings may include the Agency Assistant Director, depending on her schedule.

Administrative/Information Services Workgroup: This workgroup will be comprised of the Director of Administrative and Information Services and Branch staff, or a subgroup of Branch staff, to be determined by the Agency Assistant Director and the Director of Administrative/Information Services. This workgroup will meet three times throughout the planning process. Because the Branch Director has been hired, it is assumed that the Agency Assistant Director will attend these workgroup meetings.

Program-level Implementation Plans: Engagement Sequence

| Engagement | Objectives |
|-----------------------------|---|
| Leadership Kick Off Meeting | Discuss Leadership goals and expectations for the implementation planning process Discuss and refine the program-level implementation planning processes and key activities Plan for communication and engaging Department staff in the implementation planning process |
| Workgroup Meeting 1 | Build staff's understanding of the intent and foundation of the Agency strategic plan |
| | Inspire staff's ownership and engagement in program quality improvement Discuss the implementation planning processes and key activities Understand perceived and demonstrated program strengths and opportunities Determine workgroup's priorities, structure, and communications preferences for the planning process |
| Workgroup Meeting 2 | Engage staff as thought partners in program quality improvement related to industry performance benchmarks Map regulatory compliance indicators and common indicators of excellence Discuss key influencers of industry performance benchmarks Understand managers perceptions of continuous quality improvement related to industry performance benchmarks. |

| | |
|-------------------------------|---|
| Workgroup Meeting 3 | <p>Review and refine regulatory compliance indicators and common indicators of excellence for developing implementation plan</p> <p>Discuss program workforce skill building required to make progress toward the developing plan, with a focus on customer service and meeting/exceeding industry performance benchmarks</p> <p>Complete draft implementation plan including strategies and metrics that measures program's progress</p> |
| Agency Directors and Managers | <p>Demonstrate Agency clear line of sight</p> <p>Increase Agency-wide understanding of the interconnectedness of Agency services</p> <p>Build awareness of the Agency implementation work with a focus on continuous quality improvement</p> <p>Celebrate the plans and those that engaged in the process</p> <p><i>*Please note: This is an Agency-wide Director and Managers meeting where Departments participating in both planning processes (i.e., Program-level strategic plan and implementation plan) will discuss their work.</i></p> |

DELIVERABLE: Staff and Manager Engagement Report

Throughout the planning processes, the Contractor will weave in strategic questions that aim to assess the effectiveness of previously used staff engagement methods (e.g., coffee talks, brown bag lunches, and Managers Leadership Team meetings), as well as identify and recommend productive staff engagement strategies that can be used on an ongoing basis to aid in the advancement of the Agency strategic plan. This includes placing questions into the staff surveys and all planning meetings. This deliverable will be a brief report (3-4 pages) delivered at the end of the planning processes.

Project Timeline:

The County shall have the right to adjust the timeline to meet the needs of the project as agreed on between the County and Contractor.

| Month | Engagement Activity |
|---------------|--|
| November 2015 | Scheduling Meetings; Project Management |
| | Executive Leadership Kick Off Meeting |
| | Update Implementation Template |
| December 2015 | All Directors Meeting |
| | Program-level Strategic Planning Leadership Kick Off Meeting |
| | Implementation Planning Leadership Kick Off Meeting |

| | |
|---------------|---|
| January 2016 | Program-level Strategic Planning Workgroup Meeting 1a,b,c |
| | Implementation Planning Workgroup Meeting 1a,b |
| February 2016 | Program-level Strategic Planning Workgroup Meeting 2a,b,c |
| | Implementation Planning Workgroup Meeting 2a,b |
| March 2016 | Staff Surveys (3) |
| | Program-level Strategic Planning Workgroup Meeting 3a,b,c |
| April 2016 | Manager and Supervisor Engagement Sessions (3) |
| | Implementation Planning Workgroup Meeting 3a,b |
| | Program-level Strategic Planning Workgroup 4a,b,c |
| | Trailblazers Meeting |
| June 2016 | Program-level Strategic Planning Workgroup 5a,b,c |
| July 2016 | Cross Program Meeting |
| August 2016 | Program-level Strategic Planning Workgroup 6a,b,c |
| | Agency Directors and Managers Meeting |
| | Program-level Strategic Plans delivered |
| | Implementation Plans delivered |
| | Staff and Manager Engagement Report delivered |

- a. The Contractor will not require physical space and/or equipment, outside of the space that would be provided by the Agency to hold meetings.
- b. At the onset of the project, the Contractor will deliver a detailed project outline with meeting dates, deliverables, and objectives. Conference calls will be scheduled with the Agency Assistant Director twice a month to revisit this timeline and assess project progress. Deliverables include all meeting materials (i.e., agendas and meeting notes), the distribution of three surveys, three survey reports, a Staff and Manager Engagement Report, three Program-level strategic plans, and two program implementation plans. Periodically following meetings, VIVA will use meeting review evaluations to assess project progress and meeting engagement.

DELIVERABLES: Finance Branch Strategic Plans:

| Engagement | Objectives |
|--|---|
| Leadership Team Kick Off Meeting (CFO, Assistant Director, VIVA) | <ul style="list-style-type: none"> • Discuss Finance Director's goals and expectations for the strategic planning process • Discuss strategic planning processes and key activities • Plan for communication and engaging Branch staff in the strategic planning process |
| June 2016 | <ul style="list-style-type: none"> • Plan for collecting branch performance indicators |

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|---|---|
| Workgroup Meeting 1 June 2016 | <ul style="list-style-type: none"> • Build understanding of the intent and foundation of the Agency strategic plan • Understand the overall branch core purpose • Discuss strategic planning processes and key activities • Identify branch strengths and opportunities |
| Leadership Team Planning Call #1 June/July 2016 | <ul style="list-style-type: none"> • Review Finance Performance Indicators in preparation for workgroup meeting #2 |
| Workgroup Meeting 2 July 2016 | <ul style="list-style-type: none"> • Discuss Finance Performance Indicators • Begin conversation on strategy development for Goal 1 • Understand the management team's perceptions of continuous quality improvement |
| Workgroup Meeting 3 July 2016 | <ul style="list-style-type: none"> • Discuss proposed branch strategies for Goals 1-5 • Plan for Manager and Supervisors Engagement Session • Plan for Staff Survey |
| Staff Survey August 2016 | <ul style="list-style-type: none"> • Build on existing strategic planning data to gather non-management branch staff perspectives on branch strengths and quality improvement opportunities • Test emerging Finance strategic plan concepts |
| Manager and Supervisor Engagement Session August 2016 | <ul style="list-style-type: none"> • Understand the framework and intent of the Agency strategic plan • Discuss Finance Performance Indicators and contributors of success • Test emerging branch strategies |
| Workgroup Meeting 4 September 2016 | <ul style="list-style-type: none"> • Building upon processes to date, draft comprehensive strategies and measurable metrics for Finance strategic plan • Discuss branch workforce skill building required to make progress toward the developing strategic plan, with a focus on customer service and meeting/exceeding industry performance benchmarks |
| Workgroup Meeting 5 September 2016 | <ul style="list-style-type: none"> • Draft Finance strategic plan including prioritizing strategies and metrics |
| Workgroup Meeting 6 October 2016 | <ul style="list-style-type: none"> • Managers and Finance Director make final refinements to strategic plan |

DELIVERABLE: Staff Development Branch Strategic Plans:

| Engagement | Objectives |
|--|---|
| Leadership Team Kick Off Meeting August 2016 | <ul style="list-style-type: none">• Discuss Staff Development Director's goals and expectations for the implementation planning process• Discuss and refine the implementation planning processes and key activities• Plan for communication and engaging branch staff in the implementation planning process• Plan for collecting performance indicators |
| Workgroup Meeting 1 August 2016 | <ul style="list-style-type: none">• Build understanding of the intent and foundation of the Agency strategic plan• Understand the overall branch core purpose• Discuss implementation planning processes and key activities• Identify branch strengths and opportunities |
| Leadership Team Planning Call #1 September 2016 | <ul style="list-style-type: none">• Review Staff Development Performance Indicators in preparation for workgroup meeting #2 |
| Workgroup Meeting 2 September 2016 | <ul style="list-style-type: none">• Discuss Staff Development Performance Indicators• Begin conversation on strategy development for Goal 1• Understand the Staff Development management team's perceptions of continuous quality improvement |
| Workgroup Meeting 3 October 2016 | <ul style="list-style-type: none">• Discuss and prioritize branch strategies for Goals 1-5• Understand staff perspectives on making progress on strategies• Begin to draft implementation plan through the identification of priority strategies and metrics that measures branch's progress <p><i>*Please note: the implementation plan will be finalized after Work Meeting 3 via conference call or email with Branch Director</i></p> |
| Leadership Team Planning Call #2 October 2016 | <ul style="list-style-type: none">• Begin to prioritize one strategy per objective for Goals 1-5 |
| Leadership Team Planning Call #3 – this may need to be converted to a meeting October 2016 | <ul style="list-style-type: none">• Finish strategy prioritization• Pair indicators/performance measures to strategies as appropriate• Discuss overall draft plan |

Exhibit B (revised 5/2016) – Payments and Rates

In consideration of the services provided by Contractor described in Exhibit A and subject to the terms of the Agreement, County shall pay Contractor based on the following fee schedule and terms:

- The Contractor shall submit monthly invoices for actual costs incurred based on the budget table below.
- County shall pay Contractor upon receipt and approval of invoices.
- In no event shall services, fees, and taxes exceed the total contract obligation of **TWO HUNDRED SIXTY EIGHT THOUSAND SEVEN HUNDRED TWENTY FIVE DOLLARS (\$268,725)**.
- Invoices should be submitted to Effie Verducci, Public Information Communications Officer, 1 Davis Drive, Belmont, CA 94002.

Budget Tables

The County shall have the right to adjust costs across line items to meet the needs of the project as agreed upon by both parties.

| Planning Processes | VIVA Staff | Projected Hours |
|---|------------------------|------------------------|
| Project Planning and Guidance | | |
| Overall Project Planning | Managing Partner | 40 |
| | Associate Consultant | 60 |
| | Administrative Support | 100 |
| All Directors Meeting | Managing Partner | 12 |
| | Associate Consultant | 12 |
| Conference Calls with Agency Assistant Director (18) | Managing Partner | 36 |
| | Associate Consultant | 36 |
| Executive Leadership Kick Off Meeting | Managing Partner | 8 |
| | Associate Consultant | 8 |
| Strategic Plan Implementation Related Facilitation & Staff Engagement/Capacity Building | Managing Partner | 120 |
| | Associate Consultant | 80 |
| Cost Summary | | |
| VIVA Staff | Hourly Rate | Total Hours |
| Managing Partner | \$175 | 216 |
| Associate Consultant | \$125 | 196 |
| Administrative Support | \$85 | 100 |
| Subtotal | | \$70,800 |
| Program-level Strategic Plans | | |
| Program-level Strategic Plan Leadership Kick Off Meeting | Managing Partner | 8 |
| | Associate Consultant | 8 |
| Workgroup Meetings (18) | Managing Partner | 144 |
| | Associate Consultant | 216 |
| | Managing Partner | 9 |

| | | |
|---|----------------------|----|
| Staff Survey (3) | Associate Consultant | 18 |
| Manager and Supervisor Engagement Session (3) | Managing Partner | 24 |
| | Associate Consultant | 36 |
| Trailblazers Team Meeting | Managing Partner | 8 |
| | Associate Consultant | 12 |
| Cross Program Meeting | Managing Partner | 8 |
| | Associate Consultant | 12 |
| Finalizing Program-level Plan Document (3) | Managing Partner | 12 |
| | Associate Consultant | 15 |
| Agency Directors and Managers | Managing Partner | 8 |
| | Associate Consultant | 12 |

| Cost Summary | | | |
|---|----------------------|-------------|------------------|
| VIVA Staff | Hourly Rate | Total Hours | Cost |
| Managing Partner | \$175 | 221 | \$38,675 |
| Associate Consultant | \$125 | 329 | \$41,125 |
| Subtotal | | | \$79,800 |
| Implementation Plans | | | |
| Implementation Plan Kick Off Meeting | Managing Partner | 8 | |
| | Associate Consultant | 8 | |
| Workgroup Meetings (9) | Managing Partner | 72 | |
| | Associate Consultant | 108 | |
| Finalizing Implementation Plan Document (2) | Managing Partner | 6 | |
| | Associate Consultant | 10 | |
| Cost Summary | | | |
| VIVA Staff | Hourly Rate | Total Hours | Cost |
| Managing Partner | \$175 | 86 | \$15,050 |
| Associate Consultant | \$125 | 126 | \$15,750 |
| Subtotal | | | \$30,800 |
| Staff and Manager Engagement Process | | | |
| Report Development | Managing Partner | 5 | |
| | Associate Consultant | 8 | |
| Cost Summary | | | |
| VIVA Staff | Hourly Rate | Total Hours | Cost |
| Managing Partner | \$175 | 5 | \$875 |
| Associate Consultant | \$125 | 8 | \$1,000 |
| Subtotal | | | \$1,875 |
| Reimbursements | | | |
| Meeting Supplies and Print Orders | | | \$3,500 |
| Mileage (.575/mile) | | | \$350 |
| Budget | | | \$187,125 |

| Planning Processes | VIVA Staff | Projected Hours |
|---|--------------------------|-----------------|
| Overall Cross Branch Project Planning and Guidance | | |
| Overall Project Planning & Support | Managing Partner | 40 |
| | Consultant | 30 |
| | Sr. Associate Consultant | 30 |
| | Associate Consultant | 30 |
| Finance Strategic Plan | | |
| Leadership Team Meeting | Consultant | 10 |
| | Sr. Associate Consultant | 14 |
| Leadership Planning Call | Consultant | 5 |
| | Sr. Associate Consultant | 7 |
| Workgroup Meetings (6) | Consultant | 54 |
| | Sr. Associate Consultant | 54 |
| | Associate Consultant | 30 |
| Staff Survey | Consultant | 3 |
| | Associate Consultant | 10 |
| Manager and Supervisor Engagement Session | Consultant | 10 |
| | Sr. Associate Consultant | 14 |
| Finalizing Implementation Plan Document | Consultant | 5 |
| | Sr. Associate Consultant | 8 |
| Staff Development Strategic Implementation Plan | | |
| Leadership Team Meeting | Consultant | 10 |
| | Sr. Associate Consultant | 14 |
| Leadership Planning Calls (3) | Consultant | 15 |
| | Sr. Associate Consultant | 21 |
| Workgroup Meetings (3) | Consultant | 27 |
| | Sr. Associate Consultant | 27 |
| | Associate Consultant | 15 |
| Finalizing Implementation Plan Document | Consultant | 5 |
| | Sr. Associate Consultant | 8 |

| CCO Organizational Development Support | | | |
|---|--------------------------|-------------|-----------|
| Director-Level Branch Support | Consultant | | 40 |
| AIS & CCO Calls & Follow Up Work to Complete Branch Plans | | | |
| Leadership Team Planning Call #1 (2) | Managing Partner | | 12 |
| | Sr. Associate Consultant | | 18 |
| Leadership Team Planning Call #2 (2) | Managing Partner | | 12 |
| | Sr. Associate Consultant | | 18 |
| Reimbursements | | | |
| Meeting Supplies and Print Orders | | | \$1,000 |
| Mileage (.54/mile) | | | \$100 |
| Cost Summary | | | |
| VIVA Staff | Hourly Rate | Total Hours | Cost |
| Managing Partner | \$175 | 64 | \$11,200 |
| Consultant | \$150 | 214 | \$32,100 |
| Sr. Associate Consultant | \$125 | 233 | \$29,125 |
| Associate Consultant | \$95 | 85 | \$8,075 |
| Finance and Staff Development Budget | | | \$81,600 |
| Total Budget (Hourly + Reimbursements) | | | \$268,725 |