

Statement of Work prepared for City of Clearwater

Written by Laurie Hill at Collaborative Labs 10th August
2021



Welcome to Collaborative Labs

Expert facilitators in strategic collaboration.



Statement of Work (SOW) for the City of Clearwater CRA

Thank you for the opportunity to submit a Statement of Work for your review. The purpose of this Statement of Work is to provide a solution for your planning needs.

Your ask is that you receive high quality, efficient process facilitation for your planning engagement.

We believe that the Collaborative Labs is the best fit for your needs in light of the methodology, products and services employed.

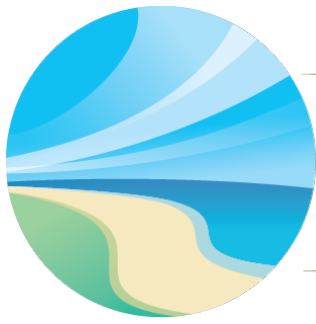
On the following pages, you will find your ask, potential timelines and process, your investment and some information about the Collaborative Labs to help you make the best decision possible.

Please know that we will make sure to deliver on the projected scope of work and feel that we are in the best position to deliver the resources you need to achieve success!

Let us know what questions you have regarding this SOW and we cannot wait

to partner with you on this important initiative!





CLEARWATER

BRIGHT AND BEAUTIFUL • BAY TO BEACH

Your Request:

A Committee was formed by request of the Mayor and City Council to determine how these Downtown organizations can better work together for the success of Downtown Clearwater:

- Downtown Development Board (DDB)
- Downtown Clearwater Merchants Association
- Clearwater Downtown Partnership
- AMPLIFY Clearwater, Chamber of Commerce

Supporting entity: City of Clearwater/Community Redevelopment Agency (CRA)

Visioning timeframe: 18 months (to align with Imagine Clearwater project)

GOALS:

- Determine the committee's purpose and mission
- Determine each organization's role in the success of the downtown area - where is there overlap?
- Develop better communication and sharing of resources / tools across the Downtown organizations
- Determine short-term goals and action items

REQUESTED OUTCOMES:

- Matrix showing a clear definition of each organization's role (e.g., who they serve, their purpose, what resources they have, their niche/what they do best)
- Action Plan that includes next steps for the committee and each organization
- Mission of the Committee/Elevator Pitch/Name of this committee

We are confident about being able to provide the services that you need to

accomplish those goals by:

- Creating a short survey to collect input from the leaders of the various organizations
- Using our Appreciative Inquiry Methodology to develop our future vision based on current success and strengths
- Providing an outcome-neutral facilitation to engage each organization to develop a cohesive plan

WE WORK TO MEET THE PAIN POINTS OF OUR CLIENTS.

THAT MEANS YOU!

EASY BUTTON

"I don't want this to be another project I have to manage."

ENGAGEMENT

"I want to bring diverse stakeholders to the table for robust collaboration."

EMPOWERMENT

"I want the stakeholders to feel as though they were part of the process."

ENHANCEMENT

"I want better team collaboration and communication so they feel valued and heard."

EFFECTIVE

"I need tangible, implementable outcomes. This can't be just another meeting. We need results."

About Us



Who are the Collaborative Labs?



Collaborative Labs at St. Petersburg College, founded in 2004, specializes in the design, facilitation and documentation of highly interactive and dynamic planning sessions resulting in engaging processes that enables maximum participation to identify areas of consensus on a shared strategic vision and priorities.

Collaborative Labs is an innovative leader in the field of facilitated problem solving and strategic planning. We use unique technologies that magnify team interactions in a way that immerses participants in the process of creating solutions which in turn creates value for each participant and the organization. This true team building process effectively breaks down silos and streamlines communication while identifying challenges and outlining lasting solutions.

Who do we serve?

- Private Sector

- Non-Profit
- Associations
- Government/Municipality
- Regional
- YOU!

Our unique approach incorporates:

- Interactive technology
- Strength-based techniques
- Real-time documentation (written and visual)

Collaborative technology such as whiteboards, visioning, brainstorming software and polling accelerate participant's best thinking.

Engaging visual illustrations can be created by a business illustrator detailing participants shared vision and priorities.



Real-time documentation of collaborative engagements ensures that all input is captured in a meaningful and comprehensive way and is forwarded to all participants within three days so implementation can begin immediately and momentum is maximized.

Collaborative Labs offers customized facilitated solutions in our innovative labs, mobile or virtual.

Examples include:

- Strategic planning
- Process Mapping
- Board Retreats

- Seminars, Round Tables and Educational
- Industry Convenings
- Business and Industry Conferences
- Listening Groups such as Focus Groups and Town Halls



Timelines & Process



Below is a super light version of a suggested timeline for your engagement.

- **Prior to signing Statement of Work** – Secure a date for your engagement.
- **Immediately following signing Statement of Work** – Send out an invite to a broad range of stakeholders.
- **3-4 weeks prior to engagement** – Schedule first data gathering call with facilitator.
- **2-3 weeks prior to engagement** – Review suggested agenda.
- **2-3 weeks prior to engagement** – Schedule any trainings or run of show calls.
- **1 week prior to engagement** – Finalize agenda.
- **Hold engagement.**

This is at an incredibly high level but there's a lot to each of these elements and there's a lot that's not mentioned.

This will all be in your data gathering call, but essentially it means that we won't just blindly stick to the plan if the data indicates something different will be more successful. Adaptability is the key and we customize to ensure the optimal outcome for your planning engagement.

Process:

After signing the Statement of Work, you will be contacted by your facilitator. They will begin the data gathering process to best determine the agenda for your planning. This data gathering will aid us in better understanding the full

scope of the work to achieve your goals. If this scope exceeds this Statement of Work, we will make recommendations to you and work together to amend as necessary.

Outcomes:

Unlike a traditional consulting approach to strategic planning, client deliverables produced through Collaborative Labs' methodology capitalize on a greater depth and breadth of institutional knowledge and expertise and result in greater stakeholder accountability, because we view/utilize the client as the "content expert," and the Collaborative Labs are the "facilitative process experts." We will facilitate your planning engagement to achieve the goals as set out through the set agenda. **Road mapping is an important part of many planning engagements. However, most road maps are not completed during the engagement. This is true because there are a lot of factors involved in putting an entire road map together including who your champions are, what resources are needed, what metrics/performance indicators can be achieved and what are the timelines. Additionally, your strategic plan and roadmap is an iterative, real-time, living document that will grow and evolve as the tactics are discussed.

MEET THE TEAM

The "A Team"

We are a little biased, but we believe we have one of those rare teams where we all work together for one purpose. We all wear many hats to accomplish the goals we set with our clients. We encourage each other and we celebrate after each engagement! Who wouldn't want to partner with a team like ours? We encourage our clients as well and want them to sit back and push the easy button as we guide them to a successful outcome!

Description of Roles:

Facilitator: The facilitator role is to work with our client stakeholders to collaborate better together, understand their common objectives, and plan how to achieve these objectives. In doing so, the facilitator remains "neutral", meaning they do not take a particular position in the discussion but efficiently and effectively synthesize the discussion to successful outcomes.

Technologist: The technologist role is to support the efforts of achieving successful outcomes through using our brainstorming and polling technology to efficiently bring about a consensus from the client stakeholders.

Documenter: The documenter role is to create a Real Time Record (RTR) that incorporates the discussions, themes, pictures, brainstorming, polling and other pertinent items. This RTR becomes a living document filled with the goals and objectives of the engagement to use as a road map in achieving successful outcomes.

Visual Illustrator: The visual illustrator role is to create an artistic design that portrays the main themes of the engagement. This illustration is key in tying all the pieces of the engagement together to use in communicating

your vision and goals to your business/organization and clients.

Meet some of our team members:

Andrea Henning, Executive Director / Facilitator

Tina Fischer , Manager /Facilitator

PJ Petrick, Senior Technologist

Laurie Hill, Branding & Business Development Officer

Karin Puckett, Budget Specialist

Milo Paich - Facilitator

Jonathan Massie - Illustrator

Annemarie Boss - Documenter

Karin Carlin - Documenter

Dina Vann - Documenter

Emily Norton - Documenter

Your Investment



Snapshot of Services Included with your Engagement Service Needs for Date(s) of Service of October 7th, 2021.

- Data Gathering Calls (2-3 included)
- Design and facilitation of the engagement agenda. (Which you will sign off prior to the engagement.)
- Breakout brainstorming coordination and report-outs
- Polling
- DELIVERABLES: Real Time Record

Facilitated Engagement

FULL TEAM / HALF DAY - MINUS ILLUSTRATOR

\$6,250

Our full team includes a Facilitator, Technologist, and Documenter. Our half day is a packed (3) three hours of structured content to efficiently collaborate and synthesize your goals for successful outcomes.

NON PROFIT DISCOUNT

\$1,800

One-off Total \$6,250

- \$1,800 \$4,450

Disclaimer & Terms

Pricing is effective for 30 days from sent day of Statement of Work. Prices are subject to change based on annual increases and changes within scope of work. Any pricing changes will be discussed with client prior to implementation and invoicing.

Terms Payment Process and Terms:

After the event, upon receipt of the deliverables specified above, Client will pay the Engagement Price within 30 days from receipt of invoice.

Cancellation Charge: If the event is cancelled, Client will pay any non-refundable, approved expenses already incurred. If the client postpones or cancels the event within 14 working days of the first day of the event for reasons other than natural disasters or national or local emergencies, Client will pay a cancellation charge equal to 30% of the fee. Acknowledgment of this Statement of Work is made known by both of our signatures below and signifies the intent of both parties to work together as outlined above.

What Our Clients Say



READ ALL ABOUT IT!

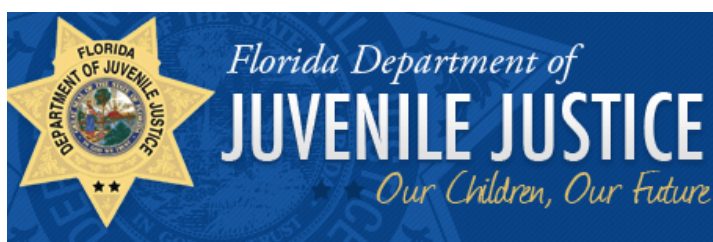
Learn how businesses and organization around the globe have used the Collaborative Labs to efficiently and effectively produce measurable outcomes through facilitated planning.



We have learned that meetings can be more efficient and that we can meet deadlines. We know that leadership and strong facilitation at meetings are extremely important to outcomes. Our second strategic plan (2013–2016) was so successful we achieved Fortune Magazine's top 100 fastest growing companies in the world for 2016! Just as we envisioned we would in our 2013 work with the Collaborative Labs. ~ Michael Benstock, CEO Superior Group of Companies



"For the second consecutive year, Frank Winston Crum has successfully engaged Collaborate Labs to conduct our annual strategic planning session. In a single day, the Collaborate Labs team facilitates effective engagement across dozens of cross functional team members to yield an updated one year and five year vision for the company. They leverage tech tools for polling, ideation, prioritization and grouping of ideas. It's astounding how much the combination of tools and effective facilitation can accelerate the formation of a business strategy. We are able to leave the session with everything we need to develop departmental goals to support overall company goals. This provides a very clear roadmap for measurable success for the short and longer term. I highly recommend Collaborate Labs to any company interested in effective and accelerated strategic planning." – Matt Crum, Frank Winston Crum Insurance



I can't say it enough Thank you, thank you . You and your team did a phenomenal job!!!! Words can't describe the day we had – OMG!!! Never have I seen an event that ran so smooth. You and your team are like magicyou make it happen! Thanks again and I look forward to working with you and your team in the near future. Cheers...well done! ~ Pat McGhee, Florida Department of Juvenile Justice



We first used the labs in 2010 when we were struggling to

create a strategic vision for our Association. By the time our work with the labs was completed, we had a vision, we had commitment, and we had the foundation of what has become a living strategic vision plan for our organization. From that plan have come initiatives that have catapulted our work and elevated our organization at the state level with decision makers. We could not have done it without the Collaborative Labs! ~ Eleanor Warmack, Florida Recreation and Park Association



You will get more productive discussion and decision-making done in a day than you will in a month of meetings in the office.~ Chris Vivian, National Forensic Science Technology Center

Guarantee



Our Promise To You

Guarantees come in all shapes and sizes, but we want you to feel confident that it is our goal to make sure you reach your goals!

How will we accomplish this?

- Honor your time - We will make sure that we are efficient in our data gathering process and commit to that culminating in an engagement agenda you can't sign off on fast enough!
- Simplify your Experience - We want this to be an easy process for you. We take on all the heavy lifting in gathering data, setting the agenda, facilitating the engagement and producing the deliverables. The only thing we don't do is read the plan out to you in the end. Well ... unless you really want us to!
- Make Things Right - If by some crazy reason, your engagement does not culminate in the goals that were predetermined - we will make things right. We want you to come out of this planning with all you need to be a success!
- Privacy - Whether you are a Non-Profit or Private Sector, your information is safe with us! Your trade secrets are safe with us! Just ask anyone! Wait, don't do that - then it wouldn't be a secret!

Next Steps



Here's what to do next

You've read through the Statement of Work – so what's next?

Step 1: Have any questions? Feel free to give us a call or email and we will respond asap!

Step 2: If you agree to the Statement of Work, email us back and we will attach a Signature Page to start moving ahead!

Thank you and we are excited to partner with you!



Equal Opportunity Statement The Board of Trustees of St. Petersburg College affirms its equal opportunity policy in accordance with the provisions of the Florida Educational Equity Act and all other relevant state and federal laws, rules and regulations. The college will not discriminate on the basis of race, color, ethnicity, religion, sex, age, national origin, marital status, pregnancy, sexual orientation, gender identity, genetic information, or against any qualified individual with disabilities in its employment practices or in the admission and treatment of students. Recognizing that sexual harassment constitutes discrimination on the basis of sex and violates this Rule, the college will not tolerate such conduct.