June 21, 2023

Colorado Springs URA

30 South Nevada Avenue, Ste. 604

Colorado Springs, CO 80903

We are excited to present a proposal for Strategic Planning and Facilitation for the Colorado Springs Urban Renewal Authority.

Trebuchet Group is a Women- and Veteran-Owned Small Business founded in 2002 and based in Fort Collins, CO.

At Trebuchet Group, we believe great accomplishments require being aligned and clear on shared direction. We have helped many organizations with their strategic planning, ranging from half-day board planning sessions to comprehensive, multi-level strategic projects involving multiple stakeholders over the course of several months. Some recent examples include working with the Fort Collins Urban Renewal Authority Board to create a high-level strategic framework; facilitation of a university-wide 7-month-long strategic planning process involving all 40 members of the senior leadership team at Colorado State University; strategic planning for campus-wide Information Technology at CSU-Fort Collins; and high-stakeholder-involvement strategic planning for several local nonprofits.

Our advisors bring a collaborative approach to work with organizations. We co-create customized project plans with clients ensuring we are all focused on successfully achieving their desired outcomes, and we check-in throughout the project to ensure satisfaction and make adjustments accordingly.

We believe successful teams are involved in the co-creation of their strategic direction, so everyone is clear how their efforts can support the bigger picture. We often hear from participants how they appreciate our effective meeting design and supportive facilitation. They believe their voices were heard and their time was well spent.

Throughout the engagement, Erin Hottenstein and Chris Hutchinson will partner in designing and facilitating the planning process, with other Trebuchet Group staff providing operational support as needed.

We are ready and able to launch this effort in July 2023. We appreciate your consideration and look forward to partnering with you.

Sincerely,

Erin Hottenstein

Senior Advisor

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erin@trebuchetgroup.com

# DRAFT Project Plan – Colorado Springs URA Strategic Planning

Co-created by Jariah Walker and Erin Hottenstein – June 2023

# Background Summary

The approach is based on the following summary and assumptions:

1. Jariah Walker is the Executive Director of the Colorado Springs Urban Renewal Authority (CSURA). In his role, he oversees 16 urban renewal projects.
2. The CSURA was established by the City of Colorado Springs City Council in 1970 as a tool to assist with the restoration and redevelopment of specified areas determined to meet state statutes for blight. The agency promotes projects that supply public benefit, provide quality sustainable places, create jobs, promote public art, offer affordable housing and raise the standard of development in Colorado Springs. These projects are achievable through the coordinated partnerships of private and public entities, civic leaders, financial institutions and the use of tax increment financing. The objective of CSURA is to facilitate development of balanced, sustainable environments where people live, work, and come together as a community.
3. The Board of Directors has 13 members, including a 6-person executive committee.
4. Jariah and the Board believe it is time to create their first strategic plan. They want a 5-year strategic plan to support making a bigger impact in the community, while driving annual planning and budgeting. Through the planning process, CSURA would consider which areas of the city should be proactively targeted. The process would also review and use financial models of other Colorado URA’s to make recommendations.
5. Stakeholders who need to be consulted include the Mayor and City Council, representatives from other taxing entities, and the general public.
6. The strategic planning process is expected to last 9 to 12 months.

# Primary Outcomes

1. CSURA board and staff are proactively targeting projects and strategically fulfilling the CSURA mission.
	1. Success in this objective would mean the following for the organization:
		1. Maximized community impact and revitalization, including beautification and the creation of jobs and affordable housing
		2. Long-term sustainability of the agency, including financial and transfer of institutional knowledge
	2. We would know we were on the right track by using the following indicators:
		1. Improved effectiveness of programs
		2. Increased financial stability
		3. Use of strategic plan documents
		4. Completion of milestones and annual evaluation
2. CSURA is working cohesively and in alignment with the City of Colorado Springs, taxing entity partners, and the wider community.
	1. Success in this objective would mean the following for the organization:
		1. Coordinated and collaborative community-wide solutions
		2. High community trust in the agency
	2. We would know we were on the right track by using the following indicators:
		1. Increased public awareness
		2. Level of involvement of stakeholders in the planning processes
		3. Feedback from community partners
		4. Decreased length of time for approval of projects

# Secondary Outcomes

These secondary outcomes should be achieved as a byproduct of the primary outcomes, or are results that need to continue as the project progresses:

1. Continued effective operation of the current programs
2. Board and staff are energized and positive about the future of the programs and their role in them

# Approach

The following describes some of our distinctive philosophy, processes and methodologies that we bring to our approach to strategic planning, which is always customized to every client’s needs.

* **Co-creation and collaboration** undergird everything we do at Trebuchet Group. This is essential for an organization like CSURA, whose success with collective impact depends on the quality of its community-wide collaboration with individuals, businesses, foundations, and public and private organizations.
* **Assets-based methodologies** help drive the inspiration needed to “pull” people toward what is wanted rather than pushing against what is not. We often leverage the philosophy and tools of Appreciative Inquiry, a groundbreaking organizational development approach pioneered by David Cooperrider.
* **Equity-minded** means that this lens is at the forefront, not in the background, of the choices used to gather input as well as to gauge the impact of the proposed plans.
* **High involvement** of (representative) stakeholdersis needed to ensure that the plan is truly “owned” by everyone, and living in their collective hearts and minds, not just memorialized in a lengthy, shelved document.
* **Outcome-oriented,** so that the big picture of WHY we exist and WHAT is wanted is always driving the HOW of what we do (and not the other way around). This requires that we harness the differential strengths and preferences of participants in their contributions to the full cycle of WHY-WHAT-HOW.
* **Initiative-focused** means we keep the focus on truly strategic initiatives at the heart of the plan and aligned within each organizational area, to lay the foundation for more detailed supporting plans.
* **Action-oriented**, because at the other end of the process, what we are aiming for is effective implementation of the strategies; a great plan includes measures of success and a schedule to monitor for success.
* **Hybrid-friendly** provides support for a mix of virtual and in-person meetings, with tools to engage participants in effective and efficient ways in a hybrid environment.
* Finally, **Customization** is the hallmark of our work, ensuring that our approach and services align with your needs, and working together to ensure it is on target and evolving as needed during the project.

**Process Overview**

This is an overview of the phases of the process we believe are relevant to CSURA’s strategic planning. The details of what’s included here are all subject to our initial design discussions.

Erin Hottenstein and Chris Hutchinson are the primary service providers, supported by other Trebuchet Group team members as needed.

1. ***Process Planning***

We recommend formation of a small Strategic Planning Committee who, along with Jariah, can participate in designing and overseeing the strategic planning process. Trebuchet Group meets with them during this stage to co-create a customized planning process and timeline encompassing all of the required elements. Please note that the foundational expertise we bring to the process is extensive facilitation experience and knowledge of options for how to conduct strategic planning. In addition, we have worked extensively with municipal governments. Beyond that, we rely on our partnership with you to provide content expertise.

1. ***DISCOVER: Internal / External Analysis and Stakeholder Engagement***

This encompasses all the data gathering and stakeholder engagement that are foundational to the plan. Based on our conversations together and our previous experience, we facilitate the gathering and processing of relevant information, likely including:

* ***Interviews*** of representative Board, staff and stakeholders (the latter based on a mapping of the stakeholder groups)
* ***Stakeholder survey***, informed by the interviews to broaden the touch points and confirm or adjust the themes developed during the interviews
* ***Best practices and market review***, targeted to those questions that are key for this planning effort, such as the fees and practices of other Colorado URA’s.
* ***Facilitated SOAR or SWOT analysis*** (by the Strategic Planning Committee or other selected body), to conclude the internal and external analysis. SOAR refers to Strengths, Opportunities, Aspirations and Results, and is an assets-based alternative to a traditional SWOT analysis.
* ***Stakeholder Review*** of draft plan, to create community buy-in and give them an opportunity to comment on the plan toward the end of the process.
1. ***DREAM: Purpose, Mission, Vision and Values***

This phase engages the Board and staff in (re-)imagining the organization’s purpose, clarifying what it does (and does not do) via the mission, aligning the core values by which it operates, and dreaming (in a structured way) what the organization will look like in the long-term future (5 years).

1. ***DESIGN: Desired Outcomes***

In this phase, we focus on the desired outcomes in 2-3 years that would be the first step toward that vision. Well-constructed desired outcomes become a North Star to establish strategic direction and drives all other aspects of the plan.

1. ***DELIVER: Goals, Resources and Accountability***

Finally, in this phase we provide guidance for the board and staff to develop shorter-term measurable goals and the resources needed to achieve them, typically with a focus of 1-2 years. Together, we discuss options for reviewing progress and holding yourselves accountable to the plan. Facilitation of decisions on the final document creation are also provided, based on a review of examples from other organizations.

**Facilitation Services – Scope**

Based on the outline above, we develop a series of facilitated work sessions–with the Strategic Planning Committee, the Board, Leadership and/or staff (all TBD) to progress through all five phases. In addition, we would have a cadence of check-ins with Jariah and/or the Strategic Planning Committee to align and ensure we are on track. In our estimation, this would include up to 8 days of facilitated interactive work sessions. Between each phase, we provide a report on the output of the session(s) in that phase, debrief it with you, and plan for the next phase.

**Biographical Information**

**Chris Hutchinson, Principal Consultant (Lead Facilitator & Advisor)**

[**https://www.linkedin.com/in/rippleleader/**](https://www.linkedin.com/in/rippleleader/)

Profile: Expert executive leadership and team coach, leader and manager with strong background in organizational improvement, change management, and leadership. Extensive quality system implementation and business process improvement experience. Significant presentation, training, team building, influencing, conflict management, and negotiating skills.

## **PROFESSIONAL EXPERIENCE**

CEO and Abundance Influencer – Trebuchet Group International LLC 2002-present

Founder. Leads team of advisors that help business owners and leaders build businesses that make an enduring difference. Designs and co-creates curriculum with clients to focus on leader, team, and system improvement. Supports clients with leadership and teambuilding, vision and strategic direction, employee and individual development, and systems which enable long-term success.

General Manager – CoachVille LLC 2003-2004

Created and maintained virtual teams which ran the live event and training given to thousands of professional coaches. Responsible for financial management, marketing and operations of the $2 million+ company. Advised executive team and leader on strategic and tactical business decisions.

Quality Director – Motorola Broadband Communications Sector (Closed 2001) 2000-2001

Coordinated product reliability prediction and validation. Led business process improvement. Managed corrective action system and responded to customer needs.

Senior Program Manager – Motorola Internet Networking Group (Closed 2000) 1999-2000

Managed programs enabling marketing, development, manufacturing, and service support of several hardware platforms and software products. Led multiple cross-functional core teams

Senior Process Engineer – Motorola Semiconductor Products Sector 1997-1999

Managed metal deposition process and 9 film deposition tools valued at $13 million. Coordinated Process Control portion of QS9000 Quality System for 900-person semiconductor manufacturing organization. Supervised work of and mentored 4 personnel.

Civil Engineering Officer – United States Air Force 1989-1997

Deputy, Resources Division 1993-1997

Managed $200 million budget in construction, repair, and service contracts; $5 million in networked computer systems; 1,500 personnel positions; and public records for 21 million square feet in 1,750 facilities. Quality Air Force (Malcolm Baldrige) advisor to Commander. Supervised 240 personnel.

EDUCATION

Master of Business Administration (High Honors), Oklahoma City University, 1994

Bachelor of Science, Mechanical Engineering, University of Colorado 1989

**Erin Hottenstein - Senior Advisor (Project Manager and Co-Facilitator)**

[**www.linkedin.com/in/erin-hottenstein**](http://www.linkedin.com/in/erin-hottenstein)

**Profile:** Extensive workshop, training, & meeting facilitation. Expert in communications from interpersonal to public relations. Significant experience with and knowledge of local government. Organizational change management, leadership development, and board governance experience.

**PROFESSIONAL EXPERIENCE**

**Senior Advisor & Confidence Cultivator** – Trebuchet Group International, LLC 2021 - PresentConsult and coach with leaders and teams to find clarity and improve effectiveness. Lead groups through strategic planning. Provide facilitation of meetings. Conduct leadership training.

**Founder** - Colorado 50-50 2017 - Present
Promote women’s leadership for women of all races, ethnicities, classes, abilities, & backgrounds. Created, scheduled, promoted, enrolled, & facilitated 20+ programs in 10 cities for 750 people.

**Trainer & Vice President of Operations** - Public Speaking for the Professional 2011 - 2021
Taught presentation skills, personality styles (DISC), goal achievement, & self-esteem courses for clients in both corporate & open enrollment settings. Coached individual clients. Assessed needs, identified gaps, & developed solutions. Conducted strategic planning.

**Adjunct Instructor** - Laramie County Community College 1999 - 2012
Taught the Power of Self Esteem & the Power of Purpose (goal achievement).

**English Teacher** - Shenyang Electric Power Institute - Red River Center May - Nov 2002
Taught English to Chinese adults, college students, and high school students.

**Healthcare and Technology Reporter** - Northern Colorado Business Report 2001 - 2002

Examined changes to healthcare industry. Highlighted trends involving local companies.

**City and County Reporter** - Wyoming Tribune Eagle 1998 - 2000
Tracked complex government actions and explained effects on the community. Related national trends to local level. Wrote daily stories on crime, lawsuits, government, health, environment, business and other topics.

**COMMUNITY SERVICE**
**Board Member** – Health District of Northern Larimer County

**Associate Member** - Larimer County Workforce Development Board **Water Literate Leaders** - CSU Water Center
**Board of Trustees President** - Local Nonprofit

**EDUCATION**

**ASSOCIATION FOR TALENT DEVELOPMENT** - *Certificates in Change Management, Coaching, and Training*

**GOUCHER COLLEGE -** *Bachelor's degree*, *Sociology and Women's Studies*

**Organizational Description**

Trebuchet Group is a local Women- and Veteran-Owned Small Business founded in 2002 and based in Fort Collins. We are also a certified B Corporation, showing our focus on caring for all stakeholders, including the community and environment. We support businesses, non-profits, education, and local and national government agencies.

We are honored to have been providing strategic planning services to a variety of companies and agencies in Colorado since 2004, including the National Center for Atmospheric Research (NCAR), Colorado State University, the National Park Service, Larimer County, High Plains Library District, and the City of Fort Collins. We have supported strategic planning for many local nonprofits including Neighbor to Neighbor, FoCo Cafe, Pathways Hospice, Community Foundation of Northern Colorado, and The Family Center.

At Trebuchet Group, we co-create plans with our clients to make sure our work results in their success first. We figure out together where you want to be and how best to support your team. At the start and during the program, we engage with your leadership team to make any adjustments to best fit the needs of CSURA.

# Fees & Time Investment

The estimated duration of this project is approximately 6-9 months. To achieve the objectives stated above within the time frame, the following investment will be required:

**Facilitation**

|  |  |  |
| --- | --- | --- |
| ***Leader’s / Planning Committee time*** | ***Team and Board members’ time*** | ***Funds*** |
| Up to 8 days (a combination of full and half days) for intensive team interactionsUp to 16 hours of planning and debrief meetings 1-2 hours coordination per month  | Up to 8 days (a combination of full and half days) for intensive team interactionsFollow-up work between sessions as needed | $82,500 |

All times listed are spent directly with CSURA. We believe in minimizing the time clients spend with us so they can spend more time enabling results. To do this we invest as much of our time preparing, learning, and doing work in advance as possible. In this case, the survey and interviews are done outside of facilitation days, and therefore not included in the facilitation days estimate above.

CSURA is responsible for venues and refreshments for participants.

Our fees are project-based and fixed fee, so that you can have confidence in budgeting. Only if the scope changes from what we agree to in the project plan will we negotiate additional fees. We do not estimate or track hours, nor charge based on an hourly rate.

We will invoice 1/3 of the project at the start, 1/3 at about 3 months along, and 1/3 at about 6 months along, each with standard 30-day terms. Any travel costs incurred will be added into invoices after they are incurred.

Additional assistance beyond collaboration to achieve what is detailed in this plan is available and will be quoted as a separate project.

***Facilitation Breakdown***

Here is an approximate breakdown of cost by Phase.

|  |  |  |
| --- | --- | --- |
| **Phase** | **Facilitation Days** | **Fees** |
| 1-Process | 1 day | $7,500 |
| 2-Discover | 1 day + survey/interviews | $22,500 |
| 3-Dream | 2 days | $17,500 |
| 4-Design | 2 days | $17,500 |
| 5-Deliver | 2 days | $17,500 |
| TOTAL | 8 days + | $82,500 |

# Writing and Editing

At Trebuchet Group, we specialize in the process of facilitating groups to get to a fantastic strategic plan that is fully owned by the client. While we capture, document, and summarize the process along the way, we understand CSURA would like to memorialize the plan in an outward-facing booklet or brochure.

As such, we will bring on a trusted collaborator who specializes in writing and editing. We will work closely with them throughout the process to coordinate and involve them so that the writing and editing the final plan is smooth.

We would also anticipate bringing a draft to the Colorado Springs URA for one review, so that any requested revisions can be made before the project ends.

|  |  |
| --- | --- |
| Up to 60 pages or approximately 30,000 words in a written document with basic layout\* | $12,500 |

\* Upgraded charts, graphics and design - or photography - would require different expertise that would be quoted separately.

# Roles and Ownership

Trebuchet Group members’ roles are that of collaborators and organization coaches. Our approach is to be the facilitators of your team members’ success, having you and your team members provide the insight, ideas, and eventual commitment to the changes they want to make. The team does the work, and we will provide the process and the tools in a “just in time” fashion. For the success of the program, it is very important that the team sees this as their own project of which Trebuchet Group is a temporary team member. Without ownership and commitment by the team, we cannot be fully successful together. We will partner together to support the agreed time deadlines for deliverables.

# Expectations

Throughout the program you can expect Trebuchet Group to:

* Provide support as needed to successfully complete the project objectives
* Transfer skills so dependence on Trebuchet Group steadily diminishes throughout the project
* Be flexible and responsive to the needs of your organization

In turn Trebuchet Group will need you to:

* Enable access to key leaders and personnel in person and via phone, video call and email
* Invest the time and energy needed for meetings and improvement efforts
* Provide payment in conformance with the terms above

We will need each other to:

* Alert each other of anything we learn that may affect the success of this plan (e.g. key people leaving, shifts in strategy, personnel conflicts, etc.)
* Respect each other’s confidentiality and proprietary materials and approaches
* Be willing to assess progress throughout the program and make adjustments as required

# Assurances

During the program we will have progress review points to provide us the opportunity to assure ourselves that the project is meeting expectations and to make any adjustments up or down as needed. If for any reason it is not meeting expectations, we may also suspend the program at that point without any future obligation. Also, any of us can call for a review point at any time to ensure we remain effective working together.

We want you to receive what you expect and what we agreed to provide. Your satisfaction is very important, and you will be asked for feedback regularly as we proceed.

# References for recent comparably complex strategic planning projects

Colorado State University Information Technology

Brandon Bernier, CSU Chief Information Officer

[Brandon.Bernier@colostate.edu](https://secure.solve360.com/)

(970) 491-7448

City of Fort Collins

Clay Frickey, Interim Planning Manager

970-416-2517
cfrickey@fcgov.com

Community Foundation of Northern Colorado

Kristin Todd, President & CEO

[kristin@nocofoundation.org](https://secure.solve360.com/)

(970) 224-3462