

2020 JAN 17 AM 9:02

Oakland City Council Board Development Proposal

January 8, 2020

The following proposal serves as starting point to generate a customized board development and training initiative for the Oakland City Council. As the creator of Robert's Rules Made Simple and co-founder of Group to TEAM Leadership Solutions Inc., I am excited to have the opportunity to work with your Oakland City Council to support them to run more effective meetings. I have worked with over 8000 boards and have provided coaching for board chairs and training to board members for close to two decades and based on our conversation I believe that we can customize a training for your council that will support you in being an even more effective board.

This proposal outlines what we need to ensure a successful program. Please review and email or fax a signed copy of this agreement to (323) 210-3280 or susan@robertsrulesmadesimple.com

Live Training Date: January 29th, 2020

Tentative Training Topics:

- Be a Better Board – Move From Group to TEAM
- Robert's Rules Made Simple
- Chair a Meeting with Confidence – Know What to Say When
- Meeting Effectiveness - The People & Process Side of Meetings

USING FROM GROUP TO TEAM & ROBERT'S RULES MADE SIMPLE

"From Group to TEAM" and "Robert's Rules Made Simple" are complimentary. Group to TEAM focuses on setting a healthy and empowered board context while Robert's Rules Made Simple provides practical content on how to run and chair a meeting using Robert's Rules of Order. This initiative will be a hybrid of our programs. It will engage and enroll your council members in co-creating a strong sense of common cause, which is the foundation of operating as a team. It will also instill practical steps on how to use Robert's Rules of Order as a TEAM building tool in your meetings to drive healthier debates and more effective results. While providing powerful tips and techniques that will support members when presiding as chair of a meeting.

PROGRAM COMPONENTS

1 - ASSESSMENT SURVEY

The process starts with a customized, online, assessment survey. This survey will be sent to each participant to be completed prior to the training. The results will establish a starting point. The goal of the training is to accentuate the strengths of the board and improve the areas that need the most attention.

2 - PREPARATION WEBINAR

Participants will attend a "prep" webinar 7-10 days prior to the live training. This webinar establishes some of our key principles so that participants enter the training with a foundational understanding of our core premise. It also introduces the trainers to the participants, forming a familiarity, along with a level of anticipation and positive expectation.

3 - IN-PERSON TEAM TRAINING

City Council members will attend a single day retreat training. This training will be co-facilitated by Susan Leahy & Freeman Michaels.

4 - INTEGRATION WEBINARS

After the in-person training, we offer a series of "integration" webinars, conference calls, pre-recorded videos and/or coaching calls to support the integration of the principles and practices into the day-to-day operations of the City Council (TEAM).

This unique integration process is a key part of our effectiveness. Most trainings fail to properly "follow up", to ensure that the material is enacted by the team.

5 - FOLLOW UP COACHING

In order to further support the integration of the Group to TEAM content, we will provide coaching calls to the chair and other members who request support. Susan and Freeman are both executive coaches, with board experience, who utilize coaching to support the process.

PROGRAM OUTCOMES:

Our programs support your people by

- Inspiring your council members to choose TEAM.
- Offering a clear understanding about what attitudes and actions generate TEAM.
- Giving your board members a simple, yet powerful, common language to support a sustainable, productive and powerful TEAM.
- Learn The 7 Fundamentals Motions used during most meeting
- Practice and feel more confident when running and chairing meeting

Our programs instill a sense of personal ownership, so that each participant takes responsibility for creating and maintaining a TEAM orientation within the City Council.

In this training

- Council members will set the context for how they want to interact during their term together.
- Council members will come to appreciate the level of respect required to function as a TEAM.
- Council members will examine their relationship with power – understanding how to shift the power dynamics toward TEAM.
- Council members will consider their mindset in relationship to their personal and collective goals.
- Council members will have the opportunity to become well-versed in the fundamentals of Robert's Rules of Order.
- Council members will learn chairing techniques that will help them deal with difficult meeting situations
- Council members will learn how to utilize Robert's Rules of Order as a TEAM building tool.
- Council members will be offered tools to improve debate amongst themselves, which will also serve as a model for how members of the community can contribute to a constructive debate.
- Chairperson training and coaching will be offered to support empowered leadership.