

**Workplace Assessment Proposals Evaluation**

Criteria	Jaqueline Boutier, Cortez	Bogle/Turlier	Ascend Beyond
Information Needed prior to beginning	Org. Structure, Employee Demographics, Previous surveys, HR, Goals, Policies, Challenges	Strategic Plan-summary and full results, Org chart, Job Desc, Personnel Policies, code of conduct	Strategic Plan, Community survey responses, ED most recent performance evaluation, org. chart, Job Desc, Bylaws, Recent bd meeting minutes (6-12 months), patron feedback
Method of collecting info	Employee satisfaction survey, conduct focus groups, Review HR records, Performance Data, Anonymous feedback	On-site observation, Confidential staff and volunteer interviews, Board interviews, Observation of staff-public Public Survey, if req.	Custom questionnaires, separately for board, staff, ED, and patrons. Individual interviews with board, staff, and ED. Complete confidentiality, never to be attributed to them in the report
Preparing summary, assessment	Compile survey results into graphs, charts, analyze, draft assessment report	Workplace culture, Role Clarity and flow, staff support & supervision, Board/staff boundaries, Public service experience and community perception	Executive summary that captures the most important findings and recommendations, identify strengths, areas of concern, public participation of library services, staff environment, leadership effectiveness
Method of presenting results to Board	Create a concise executive summary, focus on goals, time for Q&A	Executive summary, key strengths and assets, areas of concern, patterns & themes observed, practical, prioritized recommendations, written summary, questions & reflections, support Board in prioritizing areas	Executive Summary: Overview of key findings and priority recommendation, Methodology overview, Key findings, actionable recommendations, short term, medium term and long term. Written report to board one week prior, 90-minute presentation to the full board.
Plan to address any concerns	Immediate interventions, medium term initiatives, Long-term strategies, Measuring goals	We will offer immediate, short-term actions, medium-term structural of communication improvements, optional training or coaching for staff and/or board	See above
Follow-up training/coaching to board and staff	Offer workshops for managers, coaching sessions as needed, ongoing checks, resource toolkit	Board Governance Coaching, staff communication and Team-building workshops, Leadership coaching for director, Facilitated conversation to support alignment and trust, mediated conversations to address impacts, rebuild trust	If requested - Executive leadership coaching, Board training, Team Transformation Workshop, Board-Staff Retreat, Policy Development, Leadership/staff development programs, mediation or conflict resolution, implementation support, grant writing support

Timeline from start to end	Approximately 60 hours	5-6 weeks	10 weeks
Cost of preparing/presenting	Annual Retainer \$750, plus additional expenses (printing, software tools) to be approved in advance	Workplace Assessment (inc report and Board Presentation \$2500, Additional fee considered for public survey if requested	\$20,250 plus expenses including travel from Durango, meals, accommodations
Hourly rate for follow-up training/coaching	\$95/hour	If requested \$150/hour Mountain Studies Institute (2025-2026, Durango School District (2025-2026) Southern Ute (2025-2026), Animas HS 2022, 202, Durango Library (2024-2025), Silverton Public School 2019-2025)	\$365/hour
At least 3 Relevant Project References	Contento Café (2024), Red Willow Counseling (2023) Cookout Non-Profit (2024)		City of Castle Pines, Health District of Northern Larimer County, Town of Bayfield