

**ASCEND
BEYOND**
REMARKABLY LIMITLESS

**Dolores Library District
Workplace Assessment**

Rec'd
via USPS
2/9/26
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February 4, 2026

Dear Ms. Jumper and the Dolores Library District Board,

Ascend Beyond is pleased to submit this proposal in response to the to conduct a comprehensive and confidential workplace assessment for the Dolores Library District. This engagement will examine organizational culture, staff dynamics, leadership effectiveness, and public perception through a carefully designed process that maintains complete anonymity for all participants. The assessment will provide the Board with actionable insights and recommendations to strengthen the organization while creating a foundation for enhanced community impact.

Given the sensitive nature of the concerns raised and the small size of the organization, this assessment requires a specialized approach that protects individual identities while gathering honest, meaningful feedback. Our proprietary methodology has been specifically designed to navigate these challenges, providing Boards with the objective information they need to make informed decisions about organizational development and leadership.

I look forward to hearing from you after you and the Board have had time to review the proposal. Please feel free to reach out to me with questions at (970)799-2074 or amber@ascendbeyondglobal.com.

With gratitude,

Amber Blake Principal and Founder
Ascend Beyond
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QUALIFICATIONS:

WHY ASCEND BEYOND

Choosing the right partner for an organizational assessment is critical, particularly when the situation is sensitive and the organization is small. Several factors make Ascend Beyond uniquely qualified for this engagement.

First and most importantly, we have no prior relationship with the Dolores Library District, ensuring complete independence and objectivity. We have no stake in any particular outcome and no existing loyalties that might bias our perspective. Our only commitment is to conduct a rigorous, fair assessment that serves the Board's need for accurate information.

- We are the only strategic partner focused exclusively on public sector transformation. We understand the unique governance structures, regulatory requirements, community accountability, and resource constraints that define public sector work. We've worked with cities, counties, special districts, transit agencies, and higher education institutions, giving us deep familiarity with how public organizations function and what they need to thrive. This isn't theoretical knowledge—it's based on over 20 years of public sector leadership experience and hundreds of consulting engagements.
- Our proprietary methodology—informed by The Ascent™ Transformation framework—has been proven through numerous engagements and refined specifically to address the challenges of small organizations where anonymity is difficult to maintain. We know how to gather honest feedback while protecting participants. We know how to present findings in ways that inform without inadvertently identifying individuals. And we know how to make recommendations that are actionable within the constraints of small organizations.
- We bring exceptional facilitation skills and emotional intelligence to sensitive organizational dynamics. Our trauma-informed approach creates psychological safety for participants. Our coaching training allows us to listen deeply and ask powerful questions. Our experience navigating difficult conversations means we can handle challenging topics with care and professionalism.
- We focus on actionable results, not just data collection. Many consultants can gather information and produce reports, but our goal is to provide the Board with practical recommendations that can be implemented. Every recommendation we make is grounded in understanding of public sector realities and tailored to what's achievable for your specific organization.
- Our comprehensive service offerings mean we can support the organization beyond the initial assessment. If the assessment reveals needs for executive coaching,



board training, staff development, or strategic planning support, we can provide those services through our Strategic Solutions Suite. This continuity can be valuable in implementation—you won't need to bring a new consultant up to speed on your organizational history and challenges.

Finally, we bring proven operational experience as former public sector executives. Amber has sat in the executive director's chair, worked with boards, managed staff, engaged communities, and navigated the complex dynamics of public sector leadership. This experience creates credibility and understanding that purely academic or consulting backgrounds cannot replicate.

ABOUT OUR FIRM

Ascend Beyond provides strategic consulting solutions, team transformation, and leadership development to public agencies. The firm brings over 20 years of public sector expertise and partners with visionary leadership in public sector and service delivery organizations to innovate organizational capacity and generate unforgettable community impact.

As the only strategic partner focused exclusively on public sector transformation, we help visionary leaders and teams in cities, counties, special districts, and higher education institutions to develop leaders, build high-performing teams, innovate organizational capacity, and drive remarkable community impact. Our work is grounded in the belief that strong public sector organizations are essential to thriving communities, and that every public agency deserves access to world-class strategic support.⁶

The firm's comprehensive capabilities span strategic planning and facilitation, organizational development, leadership development, succession planning, and executive coaching. Through tailored and proprietary methodologies designed to realize an organization's full potential, Ascend Beyond delivers customized solutions that drive lasting success. Our approach is data-driven and people-centered, utilizing trauma-informed facilitation practices that create psychologically safe spaces for difficult conversations while maintaining the highest standards of confidentiality and ethical practice.

We believe that sustainable transformation requires more than quick fixes or superficial interventions. Our work focuses on building genuine organizational capacity, developing leaders at all levels, and creating the conditions for high-performing teams to thrive. Whether we're conducting sensitive organizational assessments, facilitating strategic planning retreats, or providing executive coaching, we bring a commitment to excellence and a deep understanding of the unique challenges facing public sector organizations.

AMBER BLAKE, PRINCIPAL & FOUNDER

Amber Blake brings over 20 years of public sector leadership experience to every engagement, combining operational expertise with strategic vision and coaching



excellence. Her career has spanned state government, municipal leadership, and consulting, providing her with a comprehensive understanding of public sector governance, operations, and organizational dynamics. Amber is uniquely positioned to lead this project as a native of southwest Colorado, currently living in Durango.

As the former State Transit Director at the Colorado Department of Transportation, Amber managed over \$250 million in FTA and state funding while overseeing 60+ rural and urban transit agencies. In this role, she was instrumental in implementing transformational projects like Colorado's Bustang system expansion and navigating complex regulatory environments while building strong relationships with local governments, special districts, and community stakeholders. This experience provided deep insight into the challenges facing small public agencies and the critical importance of effective governance.

Amber also served as Assistant and Interim City Manager for the City of Durango, where she led day-to-day municipal operations and worked closely with elected officials, department heads, and community members. This experience reinforced her understanding of the delicate balance between board governance and executive leadership, particularly in smaller organizations where relationships are close and traditional evaluation methods can compromise anonymity.

In addition to her operational background, Amber holds an ICF Professional Certified Coach (PCC) credential and serves on the faculty of the Somatic Coaching Academy. This combination of executive experience and coaching expertise allows her to facilitate sensitive conversations with both rigor and compassion, creating space for honest dialogue while maintaining appropriate professional boundaries. Her somatic coaching training brings an embodied leadership approach that helps leaders develop greater self-awareness, presence, and effectiveness.

Amber's expertise in organizational assessments, culture transformation, board governance, and stakeholder engagement has been refined through numerous consulting engagements with municipalities, special districts, transit agencies, and higher education institutions. She understands firsthand the unique challenges of small organizations where anonymity is crucial, and she has developed specialized methodologies to ensure that every voice can be heard without fear of identification or retaliation.

RELEVANT EXPERIENCE

Ascend Beyond has extensive experience conducting organizational assessments, facilitating sensitive conversations, and supporting public sector organizations through periods of challenge and transformation. The following case studies demonstrate our capacity to navigate complex organizational dynamics while delivering measurable results. References are available upon request.



Strategic Leadership Development Program: Building Team Capacity

A municipal client engaged Ascend Beyond when their executive team lacked strategic thinking skills, struggled with difficult conversations, and operated reactively rather than proactively, limiting the organization's growth potential. The executive team needed to develop the capabilities required to lead effectively, but traditional training approaches had failed to create lasting change.

We designed and implemented a comprehensive nine-month leadership development program that included strategic thinking workshops, communication skills training, 2030 visioning sessions, and individualized executive coaching. The program was tailored to address the specific development needs identified through initial assessment while building cohesion across the leadership team.

The results were remarkable and measurable. The organization documented a 133% increase in the team's ability to think strategically, a 100% increase in conflict resolution abilities, a 77% increase in effective communication protocols, and a 46% increase in understanding organizational decision-making processes. Beyond these quantitative measures, the leadership team reported feeling more confident, aligned, and capable of guiding the organization through complex challenges. This case study demonstrates our ability to assess organizational needs accurately and design development programs that create measurable, sustainable improvement.

Reference:

Michael Penny, City Manager, City of Castle Pines, 303-705-0206,
Michael.penny@castlepinesco.gov

Strategic Planning Transformation: Aligning Board and Staff for a Health District

A health district (Colorado special district) was struggling with misaligned board and staff priorities, outdated policies, and an inefficient budget process that consumed excessive time and resources without achieving strategic integration. The disconnect between board expectations and staff operations created frustration on all sides and limited the district's effectiveness in serving its community.

We conducted a comprehensive strategic planning process that began with stakeholder interviews and focus groups to understand diverse perspectives across the organization. This was followed by board alignment workshops that helped board members develop shared understanding and vision, a thorough policy audit and modernization effort that brought governance documents into alignment with current needs, and a complete redesign of the budget process to integrate strategic priorities more effectively.

The transformation was significant. The district reduced its budget preparation cycle by 40% while improving strategic integration rather than sacrificing quality for speed. Board



alignment increased dramatically, with members reporting greater clarity about their role and more effective working relationships with staff. The engagement also established a leadership development framework that continues to build capacity throughout the organization and enhanced stakeholder confidence in the district's long-term strategic direction. This case study is particularly relevant to the Dolores Library District, as it demonstrates our expertise in working with special district governance, aligning board and staff, and creating sustainable improvements in organizational effectiveness.

Reference:

Liane Jollon, Executive Director, Health District of Northern Larimer County, (970)769-0354, liane@westernleaders.org

Leadership Capability Assessment and Development Program: Transforming Team Performance

A municipal client engaged Ascend Beyond to assess their leadership team's capabilities after recognizing gaps in strategic execution and team cohesion. The initial assessment revealed that while individual team members had technical expertise, they lacked critical leadership competencies in strategic thinking, organizational leadership, change management, and emotional intelligence. These gaps were limiting the organization's ability to execute on strategic priorities and adapt to evolving community needs.

Following our comprehensive discovery process, we designed and implemented a multi-faceted leadership development solution that combined intensive in-person training with individualized support. The program included workshops on strategic thinking and organizational leadership, change management training to build adaptive capacity, emotional intelligence development to strengthen interpersonal effectiveness, and one-on-one leadership coaching tailored to each executive's specific development needs. This integrated approach ensured that learning was both collective and personalized, creating shared language and frameworks while addressing individual growth areas.

The program delivered exceptional, measurable results. The leadership team increased their overall leadership capabilities by 60%, demonstrating significant growth across all competency areas. Team members reported substantially improved interpersonal communications and working relationships, creating a more collaborative and supportive leadership culture. Additionally, the team developed deeper understanding of strategic planning processes and strategic budgeting integration, enabling them to align resources with organizational priorities more effectively. The organization now has a leadership team equipped with the skills, confidence, and cohesion needed to guide the municipality through complex challenges and opportunities.

Reference:

Katie Sickles, Town Manager, Town of Bayfield, (970) 270-5771, kasicklesco@gmail.com



What These Experiences Mean for Dolores Library District

These case studies demonstrate several capabilities essential to the proposed assessment engagement. First, we have proven ability to assess organizational dynamics accurately and identify both strengths and development needs. Second, we excel at working with special districts and understanding the unique governance challenges they face, particularly around board-staff relationships. Third, we can navigate highly sensitive situations with discretion and integrity while still gathering the honest information needed for improvement. Fourth, we deliver not just reports but actionable recommendations that create measurable results. And finally, we bring a comprehensive toolkit that allows us to support organizations beyond initial assessment into implementation and sustainable transformation.

The Dolores Library District can be confident that this assessment will be conducted with the same rigor, sensitivity, and commitment to results that characterize all our engagements.

OUR STRATEGIC SOLUTIONS SUITE

While this proposal focuses specifically on organizational assessment, understanding Ascend Beyond's full range of capabilities provides context for how this engagement can serve as a foundation for deeper organizational development work. Our comprehensive suite of services is designed to support public sector organizations at every stage of their journey.

Strategic Consulting and Facilitation

We partner with organizations to create strategic clarity and build consensus around critical initiatives. From comprehensive strategic planning to custom-designed strategy days and retreats, we facilitate the conversations that matter most. Our succession planning expertise ensures seamless leadership transitions, while our governance training programs equip boards and leadership teams with the frameworks needed to guide organizations effectively and sustainably through rapid change and strategic growth. These services include strategic consulting, advisory and planning support; custom-tailored strategy days and retreats; succession planning; and governance training.

Team Transformation

High-performing teams don't happen by accident—they happen through intentional construction. We help teams establish team covenants and commitments that define how they work together, how to navigate productive conflict, and communicate with clarity and impact. Through developing trust and psychological safety, we create environments where innovation thrives and teams achieve sustainable excellence while preserving overall work-life health. Our team transformation services include team covenant establishment, productive conflict skills development, mastering team communication, building trust and psychological safety, and optimizing work-life balance.

Leadership Development and Coaching

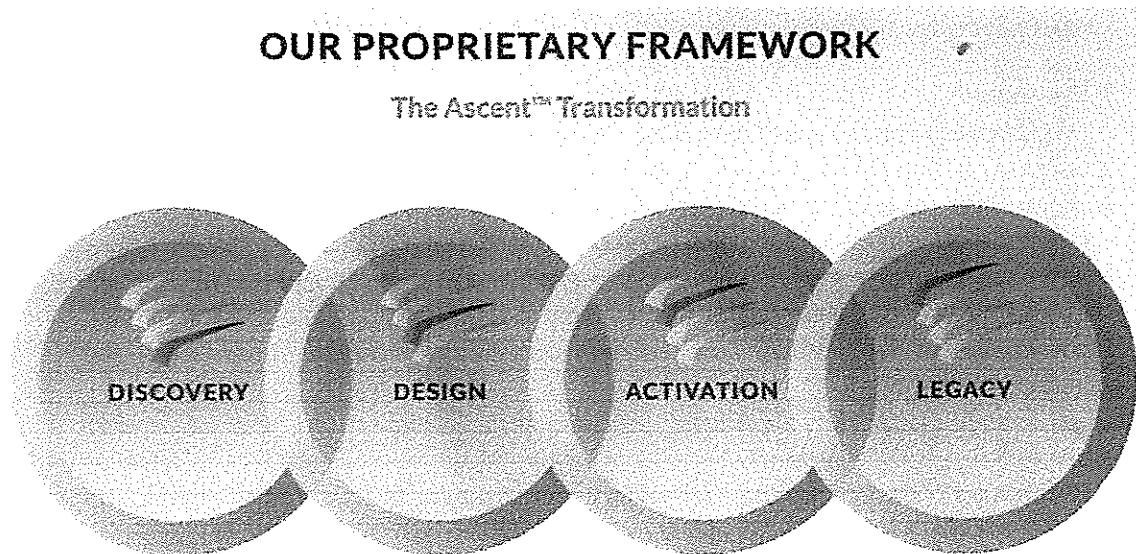


Exceptional leadership is the cornerstone of organizational success. Through personalized one-on-one executive coaching, dynamic team coaching, and comprehensive cohort leadership programs, we develop leaders at every level. Our Leadership Edge™ training series and custom workshops are designed to address each organization's unique challenges, while our selective suite of leadership assessments—including DiSC, Kolbe, StrengthsFinder, Management Drives, and the Energy Leadership Index—provide the insights leaders need to maximize their effectiveness and impact. Services include one-on-one executive coaching, cohort leadership development programs, training programs and workshops, our proprietary Leadership Edge™ Training Series, and comprehensive leadership assessments.

Grant Writing Assistance

Many public sector organizations need additional resources to invest in organizational development, leadership training, or strategic initiatives, but lack the time or expertise to pursue grant funding. Our grant writing services include identifying relevant funding opportunities, developing compelling grant applications, creating detailed budgets, and providing compliance and reporting support. For the Dolores Library District specifically, we can assist in developing an application for a DOLA grant that could help fund this organizational assessment and any recommended follow-up work.

OUR PROPRIETARY FRAMEWORK



Our proprietary framework called The Ascent™ Transformation guides our work with public sector organizations. This comprehensive approach ensures that transformation is not just a one-time event but a sustainable journey that builds lasting organizational capacity. While the organizational assessment proposed for the Dolores Library District represents



primarily the Discovery phase of this framework, understanding the complete model provides context for how this engagement could evolve into deeper partnership.

Information we will need before beginning Discovery

To conduct the most effective and targeted assessment, we will need access to the following information and documents before beginning the engagement:

- Strategic Plan (2025-2028) as revised in July 2025 (website)
- Complete community survey responses from the strategic planning process
- Executive Director's most recent performance evaluation
- Current organizational chart and staff position descriptions
- Board bylaws and governance policies
- Recent board meeting minutes (last 6-12 months)
- Any existing patron feedback mechanisms or survey data
- Any previous organizational assessments or consultant reports (if applicable)
- Budget and financial documents showing organizational resources

This document review will provide essential context about the library's current state, strategic priorities, governance structure, and existing concerns before we begin engaging with stakeholders. Understanding these foundational elements allows us to develop more targeted questionnaires and interview guides that address the specific dynamics of your organization.

Discovery

The Discovery phase establishes the foundation for all transformation work. This involves stakeholder sessions that gather diverse perspectives from across the organization and community, assessments that provide objective data about organizational health and dynamics, development of key performance indicators that define success, and clarification of program requirements and goals. For the Dolores Library District, this assessment engagement represents a comprehensive Discovery process focused specifically on organizational culture, leadership effectiveness, and stakeholder perceptions.

Design

The Design phase translates Discovery findings into actionable plans. This includes a co-creation offsite where key stakeholders collaborate to design solutions, development of program architecture that outlines how recommendations will be implemented, establishment of performance metrics to track progress, creation of a communications strategy to keep stakeholders informed, and planning for program launch. If the Dolores Library District chooses to move forward with implementing assessment recommendations, this Design phase would ensure that changes are thoughtfully planned and strategically sequenced.



Activation

The Activation phase is where plans become reality. This includes leadership development programs tailored to identified needs, ongoing partnership and support as the organization implements changes, real-time adjustment as implementation realities emerge, and milestone showcasing that celebrates progress and maintains momentum. Activation ensures that recommendations don't just sit on a shelf but actually drive meaningful change in how the organization operates.

Legacy

The Legacy phase ensures that transformation becomes embedded in organizational culture rather than dependent on external support. This includes quarterly check-ins that provide accountability and course correction, strategic advisory support as new challenges emerge, tracking of sustainability metrics to ensure changes endure, and commitment to continuous improvement as the organization evolves. The goal of Legacy work is to build internal capacity so that the organization can sustain and deepen its progress long after our formal engagement concludes.

This framework ensures that every engagement, including organizational assessments, is conducted with an eye toward sustainable transformation. Even if the Dolores Library District chooses to engage only for the assessment, the work will be conducted in a way that builds organizational capacity and positions the district for ongoing success.

PROPOSED APPROACH

Ascend Beyond has developed a proprietary assessment methodology specifically designed for small public sector organizations where confidentiality is paramount. This approach combines document review, custom questionnaires, individual interviews, and stakeholder engagement to create a comprehensive picture of organizational dynamics while maintaining complete anonymity for participants. Each phase builds on the previous one, allowing us to deepen our understanding and follow emerging themes while ensuring that all voices are heard.

Phase 1: Kickoff Meeting

Before we begin stakeholder engagement, we conduct a kickoff meeting with the Board (or the Board's executive committee, depending on the Board's preference). This meeting serves several critical purposes. We clarify the goals and success measures for the assessment, ensuring that everyone shares a common understanding of what we're trying to accomplish. We establish confidentiality protocols and explain exactly how we will protect participant anonymity throughout the process. We answer questions about the process, timeline, and what to expect. We set clear expectations about deliverables, timeline, and the Board's role during the assessment. And we ensure that the Board is aligned and ready to support the process.



This meeting also provides an opportunity to discuss any concerns or sensitivities that should inform our approach, and to make any final adjustments to the methodology before we begin.

Phase 2: Discovery and Document Review

Every assessment begins with thorough preparation. Before we engage with any stakeholders, we conduct a comprehensive review of critical documents to understand the organization's history, current state, and existing concerns. This document review includes the Strategic Plan, which provides context about the library's mission, vision, and priorities; public feedback obtained during the strategic planning process, which may reveal community perceptions and expectations; director evaluation materials, which show how performance has been assessed historically; relevant board meeting minutes that provide context for current concerns; any existing patron feedback or surveys; job descriptions and the organizational chart; and library district policies and procedures.

This discovery phase serves several purposes. It allows us to enter stakeholder conversations with informed questions rather than starting from scratch. It helps us identify potential themes or issues to explore more deeply during interviews. It provides historical context that can illuminate current challenges. And it ensures that we're not asking stakeholders to repeat information that's already documented, respecting their time and focusing conversations on deeper insights.

Phase 3: Questionnaire Development

Based on what we learn during discovery, we develop custom questionnaires tailored specifically for the Dolores Library District and its unique situation. These questionnaires are designed separately for board members, staff members, the executive director, and patrons, recognizing that each group has different perspectives and relationships with the organization.

The questionnaires use confidential online formats that protect respondent identity, combining quantitative questions (rating scales that allow for statistical analysis) with qualitative questions (open-ended responses that capture nuance and detail). The questions cover organizational culture and workplace environment, leadership effectiveness, communication and transparency, public service quality, organizational strengths and areas for improvement, and vision for the future.

Phase 4: Stakeholder Interviews

While questionnaires provide valuable data, individual interviews allow for deeper exploration of themes, follow-up questions, and the kind of nuanced conversation that reveals insights beyond what can be captured on a survey. We will conduct 45-minute individual interviews with all seven board members, all four staff members, and the executive director. These interviews can be conducted in person or virtually, depending on participant preference and scheduling considerations.



The interviews are structured but flexible, allowing us to explore common themes across all participants while also following unique perspectives or insights that emerge. Participants are assured of complete confidentiality—their specific comments will never be attributed to them in the report, and we take great care in how we present information to prevent identification. The interview format also allows participants to share concerns or observations they might hesitate to put in writing, creating space for the kind of honest conversation that's essential to understanding organizational dynamics.

Phase 4: Analysis and Report Development

Once we've completed document review, questionnaires, and interviews, we begin the careful work of analysis. This involves triangulating data from multiple sources to identify patterns and themes, comparing perceptions across different stakeholder groups (for example, do board members, staff, and patrons see similar strengths and challenges, or do their perspectives diverge?), and conducting gap analysis between the organization's current state and its desired state.

Throughout the analysis, we maintain rigorous anonymity protocols. We never attribute specific comments to individuals. We aggregate feedback carefully to prevent identification—in a staff of four, we must be especially careful about how we present information. We focus on themes rather than individual statements, and we use careful wording that protects participants while still conveying important information to the Board. Concerns that are raised are part of the process, should the concern be legal in nature and of immediate concern if it relates to staff and is the responsibility of the Executive Director the concern will be brought to the Executive Director, if the concern is regarding the Executive Director the concern will be brought to the attention of the Board President. Unless the concern is urgent in nature, it will be analyzed and included in the report.

The result is a comprehensive report that provides the Board with honest, actionable insights while maintaining the trust and confidentiality of everyone who participated in the process. This report will also include recommendations and/or solutions to address the reports findings.

DELIVERABLES

Assessment Report and Recommendations

The assessment will culminate in a written report that provides the Board with a clear, honest picture of organizational dynamics and practical recommendations for improvement. The report will begin with an executive summary that captures the most important findings and recommendations, allowing board members to quickly grasp the key themes. A methodology overview will explain our process and approach, providing context for how findings were gathered and analyzed.

The heart of the report will be the key findings section, which will document organizational strengths (what's working well and should be preserved and celebrated), areas of concern (challenges that need attention), public perception of library services, staff workplace



environment and culture, leadership effectiveness themes, and communication and culture insights. This section will be organized thematically rather than by stakeholder group, showing where different perspectives align or diverge.

The actionable recommendations section will provide the Board with a clear roadmap for improvement, organized into short-term actions that can be implemented within zero to six months, medium-term initiatives requiring six to twelve months, and long-term strategic considerations for ongoing development. Recommendations may address board governance practices, professional development opportunities, policy or procedure updates, communication improvements, or other areas identified through the assessment.

Board Presentation

PRESENTING RESULTS TO THE BOARD

We will present assessment findings to the Board through a two-part process designed to ensure thorough understanding and productive discussion:

Written Report

The Board will receive a written report that includes:

- **Executive Summary:** High-level overview of key findings and priority recommendations
- **Methodology Overview:** Summary of data collection and analysis approach
- **Key Findings:** Presentation of findings organized by theme, including organizational strengths, areas of concern, public perception of library services, staff workplace environment, leadership effectiveness themes, and communication and culture insights
- **Actionable Recommendations:** Specific, prioritized recommendations organized into short-term actions (0-6 months), medium-term initiatives (6-12 months), long-term strategic considerations, board governance recommendations, professional development opportunities, and policy or procedure considerations

The written report will be provided to the Board one week prior to the presentation meeting to allow time for review and reflection.

Board Presentation

We will conduct a 90-minute presentation of findings to the full Board during a regular or special board meeting (ideally in person, if necessary, we can conduct this meeting virtually).

The presentation will:

- Walk through the major findings and themes in an accessible, discussion-friendly format



- Present recommendations with specific implementation considerations
- Allow ample time for questions, clarification, and discussion
- Facilitate conversation about next steps and implementation priorities

We recommend that the full Board attend this presentation. Whether the Executive Director and staff should attend is a decision for the Board to make based on the nature of findings and your governance approach. We can provide guidance on this decision once the assessment is complete. If appropriate, portions of the discussion may be conducted in executive session.

This presentation is often where the assessment findings truly come to life, as board members can engage with the material, test their understanding, and begin the important work of determining how to act on what they've learned.

Follow-Up Services

While the workplace assessment provides the Board with essential information and recommendations, implementation is where lasting change happens. Based on what the assessment reveals, the Dolores Library District may benefit from additional support:

- **Executive/Leadership Coaching** – One-on-one coaching to address specific development areas identified in the assessment while supporting success and growth. Coaching engagements involve 6-12 sessions over 3-6 months package. Coaching packages include goal setting, progress tracking, leadership assessment and debrief, and 1:1 coaching sessions, ongoing strategic advising and Voxer access. 3-month package: \$5,600, 6-month package: \$8,000
- **Board Training** – Governance training on effective oversight, boundary-setting, policy governance, or board-executive director relationships to strengthen board effectiveness.
- **Team Transformation Workshops** – Facilitated workshops to rebuild trust, improve communication, and create positive workplace culture, including team covenant establishment, productive conflict skills, and psychological safety development.
- **Board-Staff Retreat** Full organization retreat to align on vision, values, and path forward, creating shared understanding and commitment.
- **Policy Development** – Assistance creating or updating policies related to communication, performance expectations, workplace conduct, or other identified needs.
- **Leadership/Staff Development Programs** – Ongoing leadership capacity building through cohort programs or Leadership Edge™ training series for leaders at all



levels. Also offered are team workshops or training focused on team alignment, communication skills, team dynamics, conflict resolution, customer service excellence, or other topics of need that may be identified in the assessment. These sessions help staff develop skills to support organizational improvement. Pricing TBD based on report recommendations.

- **Mediation or Conflict Resolution** – If assessment findings reveal specific interpersonal conflicts or communication breakdowns requiring professional mediation, we can provide neutral third-party facilitation to help stakeholders work through challenges constructively. Billed at our standard hourly rate of \$365.
- **Implementation Support** – Facilitated action planning sessions to help the Board and leadership team develop detailed implementation plans for assessment recommendations. These working sessions create accountability structures, clarify roles and responsibilities, and establish timelines. Pricing TBD based on report recommendations.
- **Grant Writing Support** – Identification and application for funding to support organizational development work and implementation of assessment recommendations.

These services can be proposed after the assessment is complete, allowing the Board to make informed decisions based on actual findings, or scoped as optional components of the initial engagement with a decision point after assessment delivery.

TIMELINE

We estimate this project will require approximately eight to ten weeks from contract execution to final deliverables, though this timeline can be adjusted based on board and stakeholder availability.

Proposed timeline:

- Weeks one and two focus on discovery and document review, during this time we would review all materials provided by the Board and develop custom questionnaires for each stakeholder group.
- Week three would involve distributing questionnaires to all participants and scheduling individual interviews at times convenient for participants.
- Weeks four through five would be dedicated to conducting stakeholder interviews with board members, staff, the executive director, and engaging with patrons through our agreed-upon approach.



- Weeks six through seven would involve comprehensive data analysis and report development, during which we would analyze all questionnaire responses and interview notes, identify themes and patterns, and draft the comprehensive report.
- Week eight would allow for draft report review with board leadership (typically the board chair and perhaps one or two other board members) to ensure accuracy and appropriateness before finalizing.
- Week nine would produce the final report delivery.
- Week ten would include the board presentation.

This timeline assumes reasonable availability of stakeholders for interviews and Board members for the kickoff meeting and final presentation. If scheduling proves challenging or if there are periods when key participants are unavailable, we can adjust the timeline accordingly. Our goal is to move efficiently while ensuring that every stakeholder has adequate opportunity to participate fully. (NOTE: Our offices are closed March 13-22)

INVESTMENT

Professional Fees

We propose a project-based fee of \$20,250.00 for this comprehensive organizational assessment. This fee includes all phases of work described in this proposal: discovery and document review, questionnaire development and distribution, individual interviews with all board members, staff, and the executive director, patron engagement, data analysis, comprehensive written report, and 90-minute board presentation.

Expenses

In addition to professional fees, we will bill for direct expenses. Travel to Dolores for in-person interviews and/or presentation (if selected): mileage reimbursement at current IRS rate, meals, and accommodations if overnight stay is required. Given the proximity to Durango, we anticipate minimal travel expenses if in-person work is desired. Other expenses may include printing and copying.

Payment Terms

Payment Terms of 50% payment upon contract execution and 50% upon delivery of the final report. This structure ensures alignment of incentives while providing cash flow to support the work.

Grant Funding Assistance

As an optional add-on service, we can provide grant writing assistance to help secure funding for this assessment and any recommended follow-up work. This service would be billed at \$365.00 hourly rate and could significantly offset project costs if grants are successfully secured. The Department of Local Affairs has grant funding that may be eligible for this project.



In Conclusion

We're excited about the possibility of partnering with the Dolores Library District on this important work. We are committed to conducting this assessment with the highest standards of professionalism, confidentiality, and care for all stakeholders. We understand that engaging an external consultant for this type of assessment represents a significant investment and requires trust. We take that responsibility seriously.

Our goal is not simply to deliver a report, but to provide the Dolores Library District Board with the insights, understanding, and actionable recommendations needed to strengthen your organization and enhance its service to the community. We believe strongly in the mission of public libraries and in the vital role they play in community life. We would be honored to support the Dolores Library District in this important work.

We welcome the opportunity to discuss this proposal with the Board and to answer any questions about our approach, experience, or qualifications. Thank you for your consideration. We look forward to hearing from the Board.

