

Leadership Coaching Proposal for Town of Munster

18 December 2020





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LEADERSHIP COACHING PROPOSAL

Steve Tulowitzki, Ward 4 Council Member
Town of Munster
1005 Ridge Road
Munster, IN 46321

Sent via email to: tulo@munster.org

Dear, Steve.

Thank you for the opportunity to submit a *revised* proposal outlining the design and facilitation of a leadership coaching process for the Town of Munster.

We applaud the proactive approach the Town is taking to create a cohesive framework for leadership effectiveness. I created this proposal based on ongoing conversations and as follow-up to the Town Board Executive meeting on 30 November 2020.

Sort Sol Group focuses on strengthening client impact with practice areas in strategy, collaboration, facilitation, business modeling, governance, leadership, organizational effectiveness, and team development. Through a focus on learning and development, and in a networked model, Sort Sol Group works with changemakers to co-create knowledge and become a collective force for social justice. We lead change, together.

At Sort Sol Group, we take a systems approach to improving impact through corporate, education, government, philanthropic, and social purpose sectors. Our aim is to create positive, meaningful, and sustainable systems change for the benefit of our community and particularly for those at disadvantage as a result of complex, long-term systemic issues.

Should you have any questions or needed clarifications regarding the scope of services, please do not hesitate to contact me directly. I look forward to the opportunity of working with your Town colleagues.

Sincerely,

Dennis S. Johnson, MBA, PCC, ORSC, CTT, CDWF
Founder and Managing Partner | Sort Sol Group
608.347.1928 | dennis@sortsolgroup.org

Sort Sol Group, LLC ("SSG"), a Wisconsin limited liability company, proposes to guide the Town of Munster ("Client") through a leadership development process as described in this contract proposal.

Consulting Firm

History

In 2015, Dennis launched Sort Sol Group, a consultancy rooted in collective impact and social justice, that focuses on strengthening social sector organizations in the areas of business modeling, collaboration, facilitation, governance, leadership, organizational effectiveness, strategy, and team development.

The Danish term "sort sol" refers to a natural phenomenon in which hundreds of thousands of starlings gather to collectively select a location to rest or avoid a predator. The [imagery](#) of sort sol connects with our values of community, partnership, and collaboration. The challenges we face are larger than any one person, organization, or sector can independently overcome – they require a unified effort to make an impact.

For more information on Sort Sol Group, please visit our [website](#).

Beliefs core to our approach:

- We believe individuals are committed to that which they help create.
- We believe those who will be most impacted by the decision should have a voice in shaping it.
- We believe that the most robust and sustainable solutions come from embracing diverse viewpoints.
- We believe organizations who commit justice, equity, diversity, and inclusion concepts to their organizational values have greater impact on their communities and provide relevance in a rapidly changing world.

About Dennis¹

In this coaching relationship, Dennis Johnson ("Coach") will draw on his leadership and asset-based coaching experience to provide customized support to Town Manager, Dustin Anderson ("Coachee") on the personal and business issues confronting him. Such coaching will create opportunities for him to develop his own leadership capacity, as he addresses both challenges and opportunities.

¹ See Appendix A: Dennis Johnson Biography.

You can count on Dennis to be honest and straightforward, asking powerful questions, and using challenging techniques to move Dustin forward. Dustin is expected to evaluate progress, and if the coaching is not working as he wishes, he should immediately inform Dennis so both parties can take steps to correct the situation. (This will be further explored in their “Designed Alliance” during the induction session.)

Positive change is challenging. It is also important to understand that coaching is a professional relationship. While it may feel like a close personal relationship, it is not one that can extend beyond professional boundaries both during and after our work together. Considerable experience shows that when boundaries blur, the hard-won benefits gained from the coaching relationship are endangered.

What Coaching Offers in Comparison

Coaching vs. other forms of leadership development (e.g., learning) – in contrast to some other forms of leadership development support, which often provide general guidance applicable across a range of situations and organizational contexts, coaching is tailored to the individual or group. The content of coaching is based on participant experiences and their reflections on their strengths and non-strengths, the specific contexts in which they are working, and their hopes and aspirations for themselves and/or their organizations.

Coaching vs. consulting – traditional organizational consulting focuses on the whole organization. Consultants bring their technical expertise to bear as they work with executive leaders, senior staff, and board members on strategies, structure, policies, and procedures to improve the effectiveness of the organization. Coaches, by contrast, apply expertise in personal development and organizational behavior to provide one-on-one and/or collective support for leaders. The coach’s goal is to help leaders make more conscious decisions and pursue actions in their professional or personal lives that benefit the organizations they lead.

Coaching vs. therapy – coaching’s emphasis on personal, as well as professional opportunities, can create the perception that it is a dressed-up form of psychotherapy. It is not. The therapist is concerned about the individual’s functioning and well-being across a range of settings, with a focus on resolving conflict for individuals and groups and/or healing pain. The focus of coaching is on bridging the personal and the professional in ways that contribute to stronger leadership.

The relationship between the Coach and Coachee is specifically designed to avoid the power differentials that occur in traditional therapeutic relationships. Agendas are co-created between both parties, and the success of the enterprise depends on Coachee’s willingness to take risks and try new approaches. The relationship is designed to be more direct and challenging.

Organizational Transformation

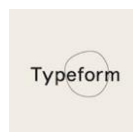
While culture change involves engineering a process and managing moving parts, transformation takes place on the inside. Transformation involves human beings and all the feelings, beliefs, and values that motivate them. It's about working with people's motivations to create something bigger and better than you could ever have imagined along. It takes time and needs to be cultivated, like growing a plant or any living thing. While change is a process from "this" to "that", transformation unleashes the best of what can be. Transformation frees human potential and accesses our collective wisdom.

Our Response to COVID-19

In response to the global COVID-19 crisis, Sort Sol Group is positioned to offer its services in a virtual space, representing the spirit of the methods and the innovation of our in-person facilitation for effective engagement.

We have extensive expertise designing and facilitating both synchronous and asynchronous collaboration; delivering hands-on, interactive, and effective online group experiences. Our facilitation ensures efficient use of time: keeping conversation on track and freeing the team to fully engage.

We are skilled in a range of virtual communication and collaboration platforms including (but not limited to):



Outline for Coaching

Dennis will design a process to support Dustin to make more conscious decisions and to take new action that will help him succeed. He will provide him with a confidential 'safe space' to reflect, to learn, and to create actionable strategies for achieving specific goals. Dennis will develop Dustin as an individual and engage him to solve his own problems and/or to reach his own solutions by fostering awareness, accountability, and action, resulting in improved

individual performance. He will apply principles from the powerful Co-Active Coaching Model (described in Appendix B).

Dennis will use personal strategic planning, values clarification, free-thinking, motivational counseling, and other techniques to assist Dustin in exploring his Signature Strengths. He will assist Dustin to leverage his Signature Strengths to be his best self, while exploring them alongside both personal and professional goals.

Coaching may address specific personal projects, including, but not limited to: life balance, job performance and/or satisfaction, or general conditions in Dustin's life and work.

For the coaching relationship to be most successful, the frequency in which Dennis and Dustin shall meet will initially be more frequent than ongoing. The cadence of coaching recommended is:

- Virtual induction session for up to two (2) hours conducted via FaceTime, telephone, Skype, or Zoom, depending on scheduling and Coachee's preference. Induction meeting to include:
 - Leader's view of coaching objectives.
 - Confidentiality, roles, process, timelines, assessments, measurement.
 - Coaching outcomes.
- Every two to three weeks thereafter, a 60-minute virtual session for six (6) months. If mutually agreeable, sessions may be face-to-face on occasion.
- Total coaching sessions: 13

(Dustin would have access to Dennis via phone and email in between coaching sessions.)

- Sponsor sessions with Coachee and up to 2, Town Council members² (45 minutes each):
 - Alignment (between Induction and Launch)

Agenda: come to a consensus around the coaching process/parameters, expectations, and communication touch points; to review roles and confidentiality parameters; and to validate coaching objectives.

- Development Plan (after assessments completed) to discuss the goals and strategy in the *draft* Individual Development Plan (IDP) and agree on a final plan to achieve success criteria.

Agenda: agree on goals and strategies in development plan; and make requests from one another for success with the IDP.

² Same two members agree to actively participate in the Sponsor sessions for the duration of coaching program.

- Conclusion (near end of coaching engagement) to bring closure to the coaching engagement by reviewing goals and expectations, sharing feedback, discussing outcomes, and determining next steps for the Coachee. This is an important time to hand back support for the ongoing development of the leader to the care of the Town Chair.

Agenda: review goals and expectations; Coachee presentation of strategies and progress made; discussion and Town Council members' input; next steps for the Coachee; continuation of goals; new goals; resources, tools, and ongoing supports.

- Total sponsor sessions: 3

Assessment

SSG will complete an informational, 360 framework by interviewing fifteen (15) participants in 45-minute confidential sessions and deliver a summary memo to Coachee. SSG will also conduct and debrief a Leadership Circle Profile (360).

Participants and evaluators will include: Town Council Members and members of his professional network (i.e., peers, business partners, and direct reports). All parties shall mutually agree on the participants/evaluators.

Coach will discuss key messages and themes from the assessments and assimilate that information into a template to be used for development planning and goal setting. Typically, this information "informs" an Individual Development Plan.

Investment

The fee for Sort Sol Group, LLC to perform the above individual coaching will be seven thousand, eight hundred eighty-eight dollars (\$7,888).

SSG shall also receive reimbursement for direct expense³ specifically related to the assessment for this engagement in the amount of four hundred, thirty-nine dollars (\$439). Client is responsible for printing copies of the digital version of said assessments, if desired.

Any additional work performed by SSG (including any governance education or team coaching) at the request of Client will be billed at a rate to be mutually agreed in advance by Client and SSG. SSG agrees not to perform additional work without the prior written consent of Client.

³ Given the current and anticipated recommendations of the CDC and public health departments around the COVID-19 pandemic, SSG has not budgeted any direct expense related to travel and will deliver this engagement virtually. Should conditions change, SSG and Client will mutually agree on these expenses.

SSG will invoice the fees prior to launch of the engagement.

References

Available upon request.

Additional Legal Terms

- a. Either party may terminate this Agreement with thirty (30) days written notice. All amounts due for work performed through the date of termination of the Agreement shall be due and payable by the Client within thirty (30) days from the date of termination.
- b. The Consultant and/or the Consultant's representatives acknowledge that they will not hold themselves out as employees of the Client. The Consultant and/or the Consultant's representatives are retained by the Client as an independent contractor. Similarly, the relationship between the Consultant and the Client shall not be construed to create a principal-agent relationship, partnership, or joint venture.
- c. The Client agrees to indemnify and hold harmless the Consultant from and against any and all claims, actions, damages, or causes of action arising out of the negligent acts of the Client in connection with the provisions of this Agreement. The Consultant agrees to indemnify, hold harmless and defend the Client from and against any and all claims, actions, damages, or causes of action arising out of the grossly negligent acts of the Consultant in connection with the provisions of this Agreement.
- d. The Client acknowledges and agrees that the Consultant shall remain the sole and exclusive owner of all materials prepared by Consultant and used to provide the services under this Agreement (the "Materials"). The Client acknowledges that it acquires no rights under this Agreement to Consultant's Materials other than the rights specifically granted in this Agreement. To the extent that any of the Consultant's Materials are included in the deliverables, the Consultant hereby grants to the Client a royalty-free, nonexclusive license to use, reproduce and distribute such Materials during the term of this Agreement solely as part of the deliverables and for internal purposes only.
- e. The Client may not use the Consultant's Materials in any manner outside the scope of this Agreement or perform or permit sublicensing or other distribution of the Consultant's Materials in any form.
- f. Unless expressly authorized in writing by the Client, the Consultant agrees to retain the Client's confidential information received by performing services under this Agreement in confidence and will not copy or disclose such confidential information to any third party or use such confidential information for any purpose other than as permitted by

the Client.

- g. Notwithstanding any other provision of this Agreement, each party acknowledges that Confidential Information will not include any information which is or becomes publicly known through no wrongful act of the Consultant; is lawfully and without breach of any agreement, in the Consultant's possession other than from disclosure by the Client; or was independently developed by the Consultant without breach of this Agreement.
- h. Miscellaneous.
 - 1. Any amendment to any provision of this Agreement or any right either party has under this Agreement must be made in writing and agreed to by both parties.
 - 2. This Agreement shall be governed by the laws of the State of Wisconsin. Any dispute with respect to this Agreement is subject to the laws of Wisconsin, venue in Dane County. Each party shall be responsible for its own attorneys' fees and costs incurred as a result of any action or proceeding under this Agreement. If any portion of this Agreement is found by a court to be invalid or unenforceable, the remainder of this Agreement shall remain in full force and effect.
 - 3. This Agreement constitutes the full and complete agreement between the Consultant and the Client, and supersedes all prior written and oral agreements, commitments, or understandings with respect thereto.
 - 4. In the event of a dispute among the parties to this Agreement regarding the provisions of this Agreement, any party may, by written notice to the other parties, call for mediation of the dispute before a mediator to be agreed upon by the parties. If the dispute is not resolved by mediation within 30 days of such notice, then any party may proceed to exercise all rights and remedies available under applicable law and this Agreement.
 - 5. This Agreement shall be binding upon and inure to the benefit of the parties hereto and their respective successors and assigns.
 - 6. Neither party may assign its interests in this Agreement without the prior written consent of the other party; provided, however, such party's consent shall not be unreasonably withheld.
 - 7. Unless otherwise specifically provided in this Agreement, all notices shall be in writing, directed or addressed to the respective addresses of the parties set forth below. Such notices shall be effective: (a) in the case of hand deliveries when received; (b) in the case of overnight delivery service; when received in accordance with the records of such delivery service; (c) in the case of registered or certified

mail, upon the date received by the addressee as determined by the Postal Service; and (d) in the case of facsimile or electronic mail notices, when electronic indication of receipt is received.

- I. If to the Client: Town of Munster, 1005 Ridge Road, Munster, IN 46321, tulo@munster.org and Town Attorney Dave Westland, 2929 Carlson Drive, Suite 300, Hammond, IN 46323; dwestland@westlandbennett.com.
 - II. If to the Consultant: Sort Sol Group, LLC, 4065 N. Sheridan Road – Suite 3N, Chicago, IL 60613, dennis@sortsolgroup.org.
8. The Consultant shall not be liable for damages for failure to perform if such delay or default in performance is caused by conditions beyond its reasonable control; provided the Consultant provides the Client with prompt written notice following the occurrence of such an event.

IN WITNESS WHEREOF, the undersigned hereby acknowledge that they have read and fully understand the foregoing Agreement and further, that they agree to each of the terms and conditions contained herein.

TOWN OF MUNSTER:

Dated: _____

[Steve Tulowitzki, Ward 4 Council Member]

SORT SOL GROUP, LLC:



Dated: 18 December 2020

[Dennis Johnson, Founder and Managing Partner]

APPENDIX A: DENNIS JOHNSON BIO

Dennis Johnson, MBA, CGT, PCC, ORSC, CTT, CDWF, brings more than twenty-five years of experience in the academic, corporate, nonprofit, and philanthropic sectors to his coaching and consulting work. He has strong skills in organizational development, planning, and facilitation with in-depth experience in engagement, facilitation, governance, leadership development, individual and organizational learning, project management, strategy, and strengths-based, talent systems.

Dennis is Managing Partner of Sort Sol Group, LLC. He is Principal of Leadership Architecture & Design, a boutique, strategic consulting practice with emphasis on executive coaching, leadership development, strengths-based organizational design, and team development; hosts Fulcrum Men; and is Chief Energy Officer of Awake@Work.

Dennis is a Certified Daring Way Facilitator with Brene Brown Research & Education Group, a Certified Transformation Tools Consultant with Barrett Values Centre, an Affiliated Consultant and Certified Governance Trainer with BoardSource, a Certified Administrator in The Leadership Circle Assessments, and a Certified Facilitator in TCC Group's Core Capacity Assessment Tool. He is a Professional Certified Coach with the International Coaching Federation with coach training from Gallup, Coaches Training Institute, the Center for Right Relationship, Team Coaching International, Potentials Realized, The Gottman Institute, and Brené Brown Research and Education Group.

Dennis is a member of American Society of Association Executives, Association Forum, Association of Consultants to Nonprofits, BoardSource, Forefront, International Coaching Federation, Organization Development Network, and the Social Transformation Project. He holds his Master's in Business Administration from the University of Nebraska's Gallup Leadership Institute and received his Bachelor's degree from the University of Wisconsin.

Dennis was named one of Madison's '40 under 40.' In his spare time, he enjoys cooking, meditating and practicing yoga, competing in triathlons, and spending time with his two, college-age daughters. Dennis is a four-time Ironman finisher.

Dennis' Gallup StrengthsFinder top themes include: activator, input, command, competition, and strategic.

APPENDIX B: CO-ACTIVE COACHING MODEL

What is Co-Active?

In a performance-rewarding environment, it's easy to lose sight of the value of real connection, intimacy, self-awareness, listening deeply to, and nurturing others – the very qualities that inform and inspire what we do, restore us, and give our lives fulfilling meaning. Times are changing as the world becomes more and more complex and yet smaller. The need for us to work together to lead effectively is urgent. Relationship intelligence is suddenly paramount to success. We at Leadership Architecture and Design consider this good news.

For the past 25 years, the Coaches Training Institute (“CTI”) has trained tens of thousands to balance the “being” and the “doing” and have seen firsthand how the Co-Active Model catapults individuals and organizations into both higher achievement and deeper connection and fulfillment. Transformational change is CTI’s business, and their model aligns perfectly with Leadership Architecture and Design’s beliefs that:

- Every individual, every organization and every team has a unique set of strengths, skills, and knowledge;
- Talent has no limits;
- People want to get the most from themselves and from their careers; and
- When people find the right fit and are encouraged to grow and learn, they are not only more productive, but they are also better colleagues, partners, parents, friends, and community members.

When combined, the vision of living an authentic life and being the best we can be, becomes reality. Through learning and building self-awareness, coachees are able to apply a combination of their strengths in a productive, positive manner that creates personal impact and drives results. At Leadership Architecture and Design, we want a world that works for everyone, where people know that who we are is as important as what we do.

The Co-Active Model

The Co-Active Model balances self-awareness, a keen agility with relationships, and courageous action to create an environment where individuals can be deeply fulfilled, connected to others and successful in what matters most.

The “Co” in Co-Active suggests relationship, connection, intimacy, and collaboration. Thus, the “Co” in us is curious, listens deeply, hears nuance, holds space for others, intuitively and nurtures.

The “Active” in Co-Active stands for power, direction, action, and manifestation. So, the “Active” in us is courageous, has clarity and conviction, takes charge, and achieves goals.

The magic happens in the dance between “Co” and “Active” — action that arises from presence, deep relationship, and context...and presence that is channeled into dynamic action and contribution. Balancing and blending these energies allows us to move out of an “either/or” paradigm into a “yes/and” paradigm.

Co-Active Training

Through Co-Active training, CTI is creating a transformative change in the way people relate to and work with each other. The work inspires people to feel engaged in and passionate about their life and work, see the good, get curious, create interactions unlike any other, become visionary, feel more alive, connect deeply to others, give real meaning to their lives, think much bigger, become great leaders, and make a difference.

The Co-Active Model has spawned a philosophy, a methodology, a skill set and a communication form that is being applied in business, education, medicine, government, communities, and families all around the world.

Co-Active Coaching

Co-Active Coaching is an experience of personal and professional development unlike other kinds of coaching. Based on the Co-Active Model, it begins by holding the coachee as naturally creative, resourceful, and whole, and completely capable of finding their own answers to whatever challenges they face. The job of a Co-Active Coach® is to ask powerful questions, listen and empower to elicit the skills and creativity a client already possesses, rather than instruct or advise.

Co-Active coaching uses an array of proprietary tools developed by CTI that have been proven as the gold standard over the past 20 years of the coaching profession.