



**The Flahive Group LLC**

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September 30, 2015

Mr. James Riesberg, Chair  
Strategic Planning Action Group on Aging

**Re: Strategic Action Planning Group on Aging:  
Summary of Reply to RFP by The Flahive Group LLC**

**Expression of Interest:**

Since I first heard about the establishment of the Strategic Action Planning Group (the “Group”), I have been interested in serving the project in some fashion. As I attended the first two meetings, it became clear that your intentions with respect to the project manager fit extraordinarily well with the interest, education and experience (professional and personal) which I bring to the task. The project promises to put to use my knowledge, skills and insights about being a senior in this society and my desire to advance the needs of Colorado’s aging.

**Qualifications:**

My qualifications fall into three categories: (a) education, (b) work experience, and (c) personal knowledge and experience regarding aging. As to education, my background in science, mathematics, business and law have served me well in my governmental career as well as my consulting work. (Attachment A is my full resume.) I’ve also taken numerous multi-day trainings in mediation, arbitration, negotiation, labor negotiation, project management, legal writing etc. Further, I’ve taken scores of courses in law in maintaining my licensure, including one on Senior Law.

Management and public policy experience includes significant contributions in fields such as employment and training, community development, economic development, health care, education and early childhood education, labor relations, emergency management and many others. In each case, I’ve served as a manager, key participant or team leader to bring ideas and initiatives to fruition. My professional references describe some of what I’ve done, and how I work, in the testimonials in Attachments B and C of the full proposal.

The two-page limit for this summary prevents me from detailing every element of my qualifications. However, below I have cross-referenced the stated requirements to some of the experiences which illustrate pertinent skills and abilities. More detail appears in the proposal.

*“Verbal and written communications skills; ability to reasonably anticipate the Group’s needs ...; taking initiative and working independently ...; ability to manage multiple activities ..., meet deadlines, and stay calm ...; ability to work collaboratively ...; experience with program development and execution ...; ability to work collaboratively with and inspire excellence ...; strong critical thinking, analysis & problem solving ...;*

Many of these skills characterize my long and successful career in government. This set in particular illustrates how I was able to take over a newly-forming institution – the Urban Area Security Initiative (the homeland security regional grant). Here, I had to marshal the talents of a variety of elected and appointed officials from across metro-Denver in allocating more than \$30

million, establishing processes to conduct planning and exercises (event rehearsals), establish a training program for hundreds of safety service and health professionals, and acquire and deploy expensive and needed equipment for emergency preparation. (It is worth noting here that three of my professional references arose from our work together on this project.)

*“Strong critical thinking, analysis and problem-solving ...; familiarity with research and interpretation of public policy and legislative and regulatory processes; expertise in a range of writing projects, especially including grant writing and reports”*

Almost all of these skills were demonstrated in the grant-writing requirements related to the health insurance exchange. I had to review existing research, interview a range of professionals, and then prepare a grant application which would be readable by legislators and subject-matter experts. I am about to conclude a three-year assignment with the Department of Local Affairs, assisting them in their strategic, performance, and operational planning needs under the Smart Government Act. On the legislative side, I served the City of Denver as one of its lobbyists for two years. That and my legal training give me significant insights into legislative processes.

*“Experience with managing public relations ...”*

As Deputy Manager of Parks and Recreation, appointed to address a failing agency, I had to use many of the skills listed throughout the RFP. In particular, I had to address public and media relationships related to the scandals which had preceded the arrival of the new management team. There are other examples where I performed various public and media relations roles. Lastly, while trained in web authorship, that training is dated and would require acquainting myself with the system in use by the State.

*“A strong interest in and a passion for the needs of older adults in Colorado ...”*

In addition to the qualifications described above, I bring insights that most candidates will not have. I bring life experience with many of the issues which are the subject matter of the agenda. I have addressed these more fully in the appended proposal.

### **Approach:**

Space limitations require that I summarize the approach which I’ve described in detail in the full proposal. In general, I have laid out what I believe my role would be in general as well as in relation to the Group and the Executive, Planning and other committees. I already have a working relationship with the Fiscal Agent as well as significant public finance expertise. I have extensive experience in managing and facilitating stakeholder groups including committees. I also have facility with a variety of computer software which will support our work.

In my discussion of staffing the Group and committees, I’ve focused on the critical role of planning all meetings in the context of a rolling 12-month plan. I’ve described some of the tools and principles which would guide that work. I’ve also given examples of some of the facilitation tools at my disposal. My role is to support the respective teams, and in particular the chairs. I’ve done this work throughout my career. Also addressed is the desirability of regional Group meetings, subject to available funds. My proposal includes using the website and Dropbox to fulfill many of the internal and external communication responsibilities. I’ve also indicated some of the vehicles we could use to ensure input from all sectors, appropriate tools for public relations, as well as my proposals for ensuring the timely production of work products by contractors and others to achieve the goals of the Act. I have added some advice on budgeting all of the resources currently available. Lastly, I’ve discussed the importance of additional funding and the crucial role a fully-developed research plan is to acquiring such outside support.



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September 30, 2015

## **Strategic Action Planning Group on Aging: Reply to RFP by The Flahive Group LLC**

This document is intended to provide the detail to my proposal to serve as Project Manager for the Strategic Action Planning Group on Aging (the “Group”) work in these next 14 months.

### **Approach**

**The purpose of the Group** is to fulfill the mandate of HB 15-1033. It is only appropriate that, as Colorado grows, we recognize that one of the largest growth sectors is our aging population. The extent to which this proves to be a burden on society and/or an asset to be cultivated depends to a great extent on how our society addresses this population’s needs and seniors’ effects on the rest of the populace.

The key passage in HB 15-1033 is *“It is therefore the intent of the General Assembly to establish a multi-disciplinary private and public sector stakeholders’ group to develop a comprehensive strategic action plan on aging in Colorado through the year 2030. This group shall provide to the Governor and General Assembly comprehensive data on ad specific recommendations regarding private and public options for addressing this demographic shift for the State to consider.”*

I believe that this multi-talented Group, coupled with appropriate and effective staff support, can achieve the aims of HB 15-1033. I look forward to an opportunity to contribute to the effort.

**The purpose of the Project Manager** is to provide hands-on assistance to the full Group, as well as the Chair, Executive, Planning, and other committees. In my experience, a Group like this is only successful if all the meetings are well planned and staffed. In a sense, the mechanics are the easy part – scheduling meetings, keeping minutes and records, managing the work of consultants – because I’ve succeeded in these throughout my career. The many key assignments I received from Mayors over my career were precisely because of my demonstrated skills as well as my ability to undertake important projects with minimal supervision, always exercised with discretion. In all of these cases, I exercised due deference to those in leadership roles, including elected officials, but blended in my own particular talents to contribute my part to the success. As to certain logistics, I generally develop standardized reporting formats (e.g. minutes, reports) in collaboration with leadership. Among other features, minutes of meetings and reports of committees will feature specific actionable measures and proposed actors and timetables. This in turn makes the role of Group member more predictable. While the Project Assistant will in many cases carry out some of these tasks, I will be directly involved in developing such systems.

**But more important than logistics is what could be called wisdom management.** How does the group capture all of what it has learned from citizens, consultants, public officials and other

experts regarding the needs of this growing population as well as best practices in addressing these needs in order to build on opportunities? Here, my skills and experience point to the need for carefully crafted and executed agendas – including for work between meetings. As importantly, I recommend a rolling 12-month work plan with sufficient flexibility to meet the evolving needs of the Group. As committees develop actionable ideas, these will be worked into the long-term Group agenda. This requires creativity on my part as well as that of the leadership.

**The RFP makes specific reference to working with the Fiscal Sponsor** (DOLA). Not only have I served in various fiscal roles myself, I already have a working relationship with DOLA by virtue of my three-year working relationship with the department and its financial professionals – including the two principal points of contact. Further, as an attorney, I pay special attention to any compliance issues and raise potential problems to leadership as soon as they are detected.

**Meetings:** While the RFP identifies a minimum of 1 two-hour meeting per month, I know from the three meetings I attended that the Group will meet twice most months, as will the Executive Committee. (Committee meetings are addressed further below.) I have the experience in staffing multiple groups and “bandwidth” to ensure that these meetings will contribute to the overall success of the Group.

**Group Meeting Preparation:** As addressed further below, there is no substitute for preparation. In my experience as a facilitator, each hour of meeting time requires at least two hours of preparation time. Given the responsibilities of the Project Manager, which extend beyond facilitation, and include document preparation and/or review, technical support, advance documents for members, etc., this ratio will be considerably higher. I expect to work with the Executive Committee (EC) and the Planning Committee (PC) to ensure that the pace and quality of the work of the Group is well planned and fully executed.

Additionally, while I am aware that the Group has solicited input from members on their interests, I suggest that I conduct a phone survey of each member to ensure that we know every topic of concern to any member. It would then be my responsibility, along with the EC, to ensure that all relevant topics have a specific place on the long-term work plan – or that the source is advised that a given topic will not be calendared.

***Technical Note:** I have considerable facility with PowerPoint and would produce the agenda and other key documents on this platform. In addition, we may find it useful to use MS Visio (a multi-purpose charting software) and/or MS Project (a detailed Gantt charting software package) to reflect planned activities at all levels. I have licensed software for all three of these.*

**Group Meeting Conduct:** I am competent in traditional facilitation techniques as well as using tools to generate ideas in the early stages and consensus in the later stages. One illustration is my work with the Center for Improving Value in Health Care – helping them to transition from a quasi-governmental entity to an independent nonprofit (in a two hour retreat). Another is my work as facilitator for the School Finance Partnership over a 9-month assignment. Here, the group met twice per month, with each meeting consisting of some joint learning followed by action items. I foresee a similar approach for the Group once there are research findings to be reviewed. This practice of shared learning is also a practice of the Caring for Colorado Foundation, of which I am a member and officer.

Over time, I expect the meetings to progress in three stages (a) activities to gear up such as approving a budget, finalizing the bylaws, securing additional consultants, etc.; (b) approval of the research design, shared learning, and addressing low-hanging fruit; and (c) bearing down on the research findings, blended with experience and insights of the Group, to formulated initial and final findings for this first year.

*Technical Note: It is possible that we may choose to use MindJet (a mind mapping package) to help with free-flowing brain-storming in meetings, as well as keypad polling to facilitate arriving at consensus. I have licensed software for both of these and probable access to the hardware for keypad polling.*

Committee Meetings: While it is my hope that committees can easily be conducted in person, in some instances, this may not be practical. Where possible, we would use phone-in services. We may need to use other tools in some circumstances. Here, the lead shifts to the chair of the respective committee. I expect to attend every committee meeting practical, while providing a less intensive level of support. The principal responsibility for committee reports to the group will be in the hands of the respective chairs. I will support them with preparation of key documents and reports. I do not foresee having formal minutes for the committees, though they could be recorded if the EC so desires.

*Technical Note: I have my own portable projector if needed. Additionally, we can experiment with Skype conferencing when there is a need to review documents remotely. Further, I have experience in using DropBox to share documents in advance of and during meetings – I’ve done so with classes I’ve taught at Regis University.*

Regional Meetings: Ideally, the Group would conduct 2-4 of its general meetings outside of the Denver metro area. However, this may depend upon additional financial resources and may be done through a select group of members serving as the ears of the Group. Here is where I expect most of the travel budget to be involved (beyond members’ travel to Denver meetings).

**Collection, analysis and documentation of previously-completed reports relevant to aging in Colorado and elsewhere:** The Project Manager is not the principal researcher. Consequently, the primary responsibility for technical reports and exhibits should be part of the RFP for the research team(s). The research team(s) should also be expected to provide digestible material for consideration by the Group. My primary responsibility would be to ensure that the work products of all aspects of the Group’s work are preserved and readily available to decision-makers. However, as an experienced editor, I also see my role as critiquing work products of other consultants and providing detailed editing where required. This would also include preparing appropriate summaries of findings and issues for consideration by the Group. All of this would be performed under the aegis of the EC and PC and any other relevant committees. The final deliverable would be a “coherent and comprehensive strategic framework for Colorado.” Additionally, I would assist the Chair in preparing an reports and executive summaries for reporting to the Governor and the General Assembly.

While I foresee using the website for information made available to the public, I expect to use Dropbox to make documents available to Group members. This is a very user-friendly way of making documents and exhibits available to members through the “cloud.”



### **Input from citizens throughout the State:**

One of the principal ways of acquiring input from across the State would be regional meetings if resources permit (addressed above). My experience as a facilitator with TBD Colorado convinces me that there is no substitute for face-to-face input where affordable. However, I anticipate using the website to conduct surveys of interested parties. I also propose that Group members and I would conduct structured phone interviews with key informants and experts to corroborate and provide texture to the research findings. There would also be a web-based vehicle for the general public to provide further insights. Lastly, once there are research findings ready for review by the Group, I suggest that each agenda for the Group and expert committees include a finite amount of time for statements by those in attendance.

### **Working with other state or local agencies and other organizations:**

Most of my career has involved collaborating with other organizations. The most vivid examples are (a) my work in the Governor's Office, which entailed collaborating with several agencies on labor relations matters; and (b) my work with UASI coordinating with safety, health and other agencies across the metro area to develop and execute a comprehensive homeland security response capability.

Some of the agencies pertinent to the project mandate are represented in the Group. They would have principal responsibility for input and coordination of the respective agency's role in relation to the Group. Other agencies' input would be by way of key informant interviews. Still others might serve on expert committees. Further, in some cases it may be appropriate to put an agency on the agenda of a committee or the full Group.

**Directing and managing development, writing, editing, publishing, submission and timely dissemination of any reports,** including the final plan and recommendations due to the Legislature, Governor and affected agencies by November 30, 2016: Some of this is addressed above under collection/analysis. While the research team(s) would have principal responsibility for technical reports and appropriate summary documents, one of my responsibilities is ensuring that each team performs that work on time and in keeping with their contracted responsibilities – including reporting on progress and providing draft and final reports. I also intend to serve as a principal editor – especially with respect to elements which reflect the findings and conclusions of the Group's work. The details of the publishing process will depend upon the amount and complexity of the material involved. Beyond that, I expect that I will be responsible for drafting any documents needed by the Group and not otherwise assigned. I have considerable writing and editing experience.

While I anticipate that electronic publication, on the website and elsewhere, will meet most of the dissemination needs, I will have ultimate responsibility for production of professional reports for the Governor and the Legislature.

### **Managing public relations, the web site, and the external distribution of information:**

Throughout my career, I have been in positions of responsibility which required participation in video, audio and telephone interviews with broadcast and print media. Additionally, I often was called up to develop the raw material for Mayoral press releases on matters within my area of expertise. Lastly, I oversaw some of the public relations work of the Denver Department of Parks and Recreation while serving as Deputy Manager.

As to external distribution, I have addressed above the use of the website, Dropbox and other electronic means to make information available to interested parties. Regarding the website, I have been trained as an author and editor for City websites, but such training is quite dated. While I am willing to learn what is needed, I will propose that some budget be allocated for part-time webmaster for the site, whether external or as an expansion of the Fiscal Agent's role.

#### **Securing additional funding:**

I believe that additional funding will be very important for the first-year work. The field is quite expansive and may require more than one research entity. While all of us will ensure that all funded work is completed, it is difficult to determine with certainty whether it will be sufficient to fulfill the Act's requirements to the level that we all would prefer. I am aware of two firms which considered this project but declined because of the funding limits.

At the same time, I am aware that most foundations and other fund sources are unlikely to fund operations of the Group, but might be interested in funding research. This is where the research design takes on added importance. The research team(s) should be expected to produce a design within the budget provided to each, and also research specifications to more fully explore what could be accomplished with additional resources. This would be necessary to induce foundations to contribute to the research effort.

While the RFP suggests that this solicitation of outside funding be the primary responsibility of the Planning Group (with my assistance), I believe that additional members of the Group can be enlisted to link us to other funding prospects – even their own agencies. These “insiders” should be able to determine early in the process whether their agencies can assist. Others may serve on boards of potential funders.

In addition to staffing the PC in this area, I also have cultivated a considerable network of contacts, in most cases in person, including the CEOs of most of the major foundations. I would propose that the PC focus on the Colorado Health Foundation, the Rose Community Foundation, the Denver Foundation, the Colorado Trust, the Gates Family Foundation, and the Caring for Colorado Foundation. (Regarding the last, I would expect someone else to initiate contact given my role on that Board.) I have considerable experience in grant writing, albeit primarily for federal funding. However, many of the foundations have moved to online applications. Having done such applications both for the funding of the health insurance exchange and UASI, I feel confident that I can orchestrate the necessary application stages as well as work with the Fiscal Agent regarding the necessary accounting and reporting.

#### **Ensuring compliance with HB 15-1033 as well as other applicable laws and regulations:**

As an experienced grant manager and attorney, I am aware of the importance of compliance with laws and regulations. I have had to operate under federal and state laws, rules and guidance documents for much of my career – particularly with regard to the homeland security and exchange grants as well as DOLA's strategic planning.

#### **Monthly progress reports to the Executive Committee and the Planning Group:**

I believe that monthly reporting may be required. I would develop and submit a standard format and calendar to the two committees in advance to ensure that the key elements are always available to committee members. However, I anticipate far more frequent reporting via emails to the EC and the PC – especially in the initial three to four months.

## Project Management and Coordination

Due to budget constraints, this is of necessity a part-time position. Nevertheless, I expect to give responsibilities for this position the highest practical priority. I expect to be contributing virtually every day and on weekends. I expect to be in contact with committees and contractors weekly or more frequently to ensure timely delivery of quality work products.

Further, I expect to be using planning tools to ensure that committee members, contractors, and I are aware of due dates and delivery modes. Personally, I use my Outlook calendar to ensure that every key date and deliverable is in my daily view. I will also be using its calendaring function to set up meetings and phone conferences at key junctions to keep on pace. Additionally, the overall plan will be maintained in a Gantt chart, a version of which will be available to all parties through Dropbox.

All of this will be in keeping with the agreed rolling twelve month work plan that would be established and maintained throughout the course of this project

*Technical Note: I expect to use MS Project (a detailed Gantt charting software package) to reflect planned activities at all levels. I have licensed software.*

## Appropriate Subject-Matter Experience and Expertise

One of the principal roles of the Project Manager is to direct the flow of information to and from the Group by way of the tools addressed above. Most of the items specified in the RFP, and listed in bold below, relate to this information management role.

### **“Working with a task force or similar”**

Throughout my career, I’ve staffed blue-ribbon commissions, executive staff sessions, etc. Early in my career in Denver, this involved Mayoral advisory groups regarding employment and training, community development, and economic development. Later, I staffed blue-ribbon groups dealing with some key bond issues for the City of Denver. These were very early in my career. Many more such occasions followed.

The most vivid and comprehensive example in my more recent career is the Urban Area Security Initiative. A few days after I chose to retire from the City of Denver to seek new experiences, I was hired back on contract to manage the UASI grants. These were granted to Denver from the federal Dept. of Homeland Security but intended to serve the entire metro area in disaster preparation. I was hired for 18 months, then extended 18 months, then extended 5 more months, at which time I decided it was time for something new and challenging. I had to use virtually all of the skills sought in the RFP. I managed 5 staff as well as orchestrated and facilitated the meetings of the Working Group (the governing body) in allocation more than \$30 million to planning, exercises (response rehearsals), high tech equipment and rolling stock, and a major



training program for hundreds of first responders – as well as the execution of the planning elements. (My work there generated three of my professional references in Attachment B.)

The second key example comes in my consulting role. In 2011, I served as the grant writer for the Level I health insurance exchange from the Federal Government. I was not a subject matter expert – rather I was hired because of my sound writing and interviewing skills as well as my ability to digest technical work into readable format. I was responsible for capturing the work of the scientific and other professional resources, and the input of the Board, to prepare an extensive online grant application to federal government. While I did not staff that Board, my work products demonstrate my ability to draft readable versions of complex matters.

A third example is my role as Deputy Manager of Parks and Recreation as a Mayoral appointment. Here, and elsewhere in my career, I was responsible for direct management as well as reporting to Mayor's Offices and City Council committees.

More recently, and specific to facilitation of groups, I was the sole facilitator of the School Finance Partnership in 2011 and co-facilitator in the final consensus sessions. That project resulted in more than 30 consensus recommendations which have guided much of the education accountability and finance legislation considered in the ensuing years.

#### **“Managing and communicating with a variety of stakeholders”**

In my work in homeland security management and finance (UASI), I developed methods for keeping stakeholders involved. I also developed a financial reporting mechanism on Access to meet the needs of the City, the State, and the federal government. In my DOLA contract, I worked with five division heads and the Executive Director's Office to produce four annual strategic plans while enlisting not only participation but support from the contributors. In my teaching career, I have used Dropbox very effectively to keep key documents readily available to those needing them.

Now, there are additional tools (mentioned previously) which make such communication much more efficient (website, email, Dropbox, etc.). Further, other tools (PowerPoint, Project, Excel, Visio, etc.) provide ready ways to supply pertinent information in summary or graphic form.

#### **“Developing actionable plans”**

Most of the projects mentioned elsewhere in this submittal illustrate my capabilities here. For UASI, I had to develop and submit annual plans, budgets and revisions for more than \$30 million in resources. This also required that I develop a database on MS Access to meet the various tracking and reporting requirements.

For DOLA, I have developed a framework for annual strategic planning which the agency and I have applied in four consecutive annual plans. These have in turn been reviewed by applicable legislative committees and extremely well received. (One of my testimonials in Attachment C was the Executive Director who hired me to perform this work.)

My work with the School Finance Partnership resulted in more than 30 actionable consensus recommendations which have guided significant legislation in the ensuing years.

Lastly, the work on the level one grant for the health insurance exchange required a technically accurate and actionable plan to deploy \$18 million for the early construction and planning stages of the exchange.

**“Working independently yet collaboratively with partners”**

The testimonials in Attachments B and C give high marks for my work ethic and methods in enlisting the contributions of diverse parties in key planning activities – including DOLA, UASI, and Denver Parks and Recreation. I am confident that each of these references will confirm my ability to work collaboratively. It is the only way I operate.

**“Working on issues related to the work of the Planning Group”**

My work with the health insurance exchange, as well as my service on the Caring for Colorado Foundation, illustrates my interest and experience with some of the subject matter of this project. In my legal capacity, I learned a lot about vulnerability of the aging population while taking a Senior Law course for continuing legal education. I’ve addressed above how I’ve cultivated skills in the processes of value in working in any public policy arena.

As importantly, I bring insights that most candidates will not likely have. First, I bring life experience with many of the issues which are the subject matter of the Group’s agenda. In brief, at age 70 I am aware of many of the challenges that a senior can experience, whether first-hand or second-hand. While I continue to work by choice, many of my contemporaries are retired. Some of these are experiencing the roller-coaster ride that is the stock market. And I know from other experiences how many seniors are subject not only to problems with availability of health services, but also addressing income insecurity, food and shelter problems, mental health needs, personal safety issues and the like. As a member of the board of the *Caring for Colorado Foundation*, I get to see the many gaps in services across the state – in particular those affecting seniors. My wife runs the Women’s Homelessness Initiative, which has enlightened me on the many hardships for those most in need, many of whom are seniors. In my own family, my wife and I have had to deal with her mother’s Alzheimer’s disease and the family stresses among siblings which often accompanies this dreadful affliction. Friends of ours are enduring varying ailments connected with age – though fortunately, all of these have affordable health care.

This life experience gives me insights and interests which many candidates are not likely to have. This relevant experience also fuels my passion for this project.

## Budget

The full amount available for the project based on state appropriations breaks down as follows:

|   |                  |  |
|---|------------------|--|
| Full amount from fiscal note                                      | <b>\$368,395</b> |  |
| Amount centrally appropriated (not part of project appropriation) | \$3,480          | Fringe benefits for 0.3 FTE for Fiscal Agent |
| Appropriation in bill HB 15-1033                                  | <b>\$364,915</b> |  |
| 0.3 FTE allocated to Fiscal Agent                                 | \$13,874         |  |
| <b>Available to Board</b>   | <b>\$351,041</b> |  |

This estimate is in turn based on other estimates, as shown below:

|  |                  |
|--|------------------|
| Travel Estimate by Legislative Council     | \$50,000         |
| Consultant Estimate by Legislative Council | \$300,000        |
| Expenses Estimated by Legislative Council  | \$1,041          |
|  | <b>\$351,041</b> |

This estimating process is used by the General Assembly to “size” a project like this, and is not binding on the Group. Thus far, it does not appear that the Group has specifically allocated anything from the available funds except the amount in the RFP for the proposed consulting services for project management services: \$100,000. Below is my estimate of the allocation I propose for the personnel costs and related:

|                             | Hourly Rate          | Average Hours per Week * | Number of Weeks (in 14 month horizon) | Budget for 14 Months |
|-----------------------------|----------------------|--------------------------|---------------------------------------|----------------------|
| Project Manager             | \$75.00 <sup>1</sup> | 17                       | 60                                    | \$76,500             |
| Project Assistant           | \$40.00 <sup>2</sup> | 10                       | 57                                    | \$22,800             |
|                             |                      |                          |                                       | \$99,300             |
| Copying for Meetings & Misc |                      |                          |                                       | \$700                |
| <b>Total</b>                |                      |                          |                                       | <b>\$100,000</b>     |

<sup>1</sup> This rate is 58% of my current rate with existing clients.

<sup>2</sup> This rate is gross, i.e. inclusive of compensation and any administrative cost

### Key budget comments:

- I would prefer to see another \$10,000 available for staff support by reducing the travel estimate accordingly – e.g. by increasing the Project Assistant hours, and possibly engaging professional transcription services. However, I am prepared to make this work within the constraints you have provided and the resources above.
- The estimates assume no employee benefits and local travel expenses for personnel.

- Use of personal equipment (phones, computers, software, automobiles, etc.) would not be reimbursable to staff, except for out-of-town travel.
- Likewise, there would be no paid vacation, sick or holiday time, though all would expect to find ways to work around sickness issues.
- Additionally, I will recommend that the Group hold back \$30-50 thousand in the initial contracting stage to address unforeseen needs which are likely to arise during the course of this project.
- I would continue to file my own quarterly tax returns, and the firm providing the Project Assistant (discussed below) would bill for compensation and any overhead costs. Whether the project assistant would be responsible for payment of taxes or whether the firm would do the withholding would be at their mutual agreement.
- Any out-of-Denver travel would be reimbursed to staff and Group members from the travel line-item in whatever budget is developed between the Executive Committee and me, and subsequently approved by the Group.
- Note that I have a large range of licensed software available on my computer. I do not currently foresee the need for additional software. I have noted in the rest of the proposal under “Technical Notes” where I see the use for some of the more unusual software. In general, I will make extensive use of PowerPoint, Word, Excel, Dropbox and Outlook.
- Additionally, I will probably maintain and develop the budget via Access because of its powerful report-writing capability.
- Incidental copying, prepared at my home office, will not be charged to the Group. Larger amounts of copying would be charged to the copying line above. If that proves to be insufficient, I will address that in future budget review discussions.

Project Assistant: the RFP contemplates that the Project Manager and Project Assistant “apply as a team.” Because this RFP was issued while I was out of town on vacation, and because a small firm like mine normally has to contract out for additional services, I have not yet named an assistant. A firm in a similar line of work, but with significant staff, has agreed to be the conduit for retaining the assistant should I be selected as Project Manager.

In the second meeting of the Group, when there was extensive discussion of the staffing needs, several members indicated the importance of allowing all forms of proposers, including individuals and small firms, to bid on this project. Later, the Group inserted the idea of bidding the two positions as a group. While I have submitted the work plan and budget in anticipation of the availability of an assistant, I have not yet identified one. It is my hope that the reviewers will see that, as applied to someone like me, the two stated objectives run afoul of one another. I believe that my proposal is sufficiently strong and pertinent that you will favor the openness to small firms and not devalue my proposal for not yet having identified an assistant.

## References

In the interests of simplicity and accuracy, I have appended my full resume (Attachment A) and my long-term professional references (Attachment B). Additionally, several of my clients have chosen to write testimonials for me in LinkedIn. I have included their views on my work

verbatim as Attachment C. All phone numbers and e-mails, when available, appear in those attachments.

### Conflict of Interest

Neither I nor my company has any conflicts of interest that I can foresee relating to this project or the Group. While I currently provide strategic planning services under a purchase order with DOLA, assisting them with their responsibilities under the SMART Government Act, and have done so for more than three years, that project will come to completion in mid-December. I do not foresee this as any real or perceived conflict but felt I should identify it anyway. It would be incumbent on me to advise you if any conflicts should arise in the course of this engagement.

## Exhibit A: Resume of Martin E. Flahive

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| <b>Martin E. Flahive, MBA, JD</b> | 624 Lafayette St.<br>Denver, CO 80218 USA<br><br>720-235-7819 (cellular)<br><a href="mailto:Martin@Flahive.us">Martin@Flahive.us</a><br><a href="http://MartinFlahive.com">http://MartinFlahive.com</a> |
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| Strategic Planning & Problem Solving   | Public Policy Analysis & Implementation |
| Financial Management & Analysis        | Legal & Ethical Analysis                |
| Facilitation, Mediation, & Negotiation | Numerous Additional Professional Skills |

### Objective

*Serving one or more governmental or non-profit agencies, utilizing a unique set of talents & experiences to address problems in planning, financing & delivering essential community services*

### Current Employment

#### Principal: The Flahive Group LLC

2006 to present

- Currently on contract as: (a) strategic planning advisor to the Colorado Dept of Local Affairs; (b) appeals manager for evaluation system for DIA concessionaires; (c) quality assurance manager for Denver Preschool Program; and (d) collective bargaining compensation advisor and expert witness for the City of Boulder
- Previous engagements: (a) Facilitator for TBD Colorado, a Governor's initiative to seek public engagement in planning Colorado's future; (b) Expert witness preparation for Boulder collective bargaining; (c) Facilitator for School Finance Partnership (an array of subject-matter experts developing consensus solutions to Colorado P-12 finance); (d) Principal drafter for the successful \$18 million level-one grant application for Colorado's health insurance exchange; (e) Board facilitation for CIVHC & Habitat for Humanity; (f) business planning facilitator for FamZoom.
- See page 2 for prior consulting work with the Denver Preschool Program, the Territory of Guam, and the Los Angeles Sheriff's Department

#### Adjunct Faculty Member: Regis University (part time)

1992 to present

- Instructor of business law and ethics for MBA program. Class size 12-22. (8-week courses, one night per week, 4 hours per night, 1-3 times / year).

#### Attorney at Law

1978 to present

- Solo, part-time practice specializing in wills, trusts and estates
- Member of Colorado Bar since 1978.

### Prior Professional Experience (2001 to present)

#### Governor's Designee for Employee Partnerships – Colorado

2008 to 2011

- Appointed by Colorado Governor Bill Ritter to implement Executive Order D 028 07 regarding employee partnerships.
- Successfully implemented executive order including managing elections of organizations to represent employees in deliberations with management teams from state agencies.
- Established a new system of labor relations within and across state departments using interest-based bargaining methods as well as mediation and negotiation skills, legal experience and interpersonal skills.
- Trained new members in interest-based problem solving method.



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| <b>Special Assistant to the Denver Manager of Safety</b>   | 2004-2007 |
| <ul style="list-style-type: none"> <li>Program manager for the Denver Urban Area Security Initiative, managing more than \$30 million in federal grants for homeland security readiness in the Denver metropolitan area.</li> <li>Extensive collaboration with officials from Denver, 27 regional partners (cities, counties, fire districts, and others), federal &amp; state agencies – including mediating competing interests among organizations.</li> <li>Led staff of 5 in the strategic planning, equipment, training, and exercise programs for first responders to implement national, state, and regional homeland security plans.</li> </ul> |           |
| <b>Consultant: Denver Preschool Program</b>  | 2008-2009 |
| <ul style="list-style-type: none"> <li>Performed financial planning and modeling services for a Denver non-profit committed to extending quality pre-school education to Denver's children.</li> <li>Successfully developed a financial model to permit the agency to anticipate financial consequences of alternative scenarios. Responsibilities included presenting results to staff, board and advisors.</li> </ul>  |           |
| <b>Collective Bargaining Team Member – Denver Government</b>   | 1995-2008 |
| <ul style="list-style-type: none"> <li>Leadership role for collective bargaining team representing City and County of Denver administration in negotiating 13 multi-year agreements with the bargaining agents for police, firefighters, and deputy sheriffs</li> <li>A principal drafter of charter amendments establishing collective bargaining for police officers and deputy sheriffs which were adopted by the electorate.</li> <li>Expert witness in 5 arbitrations.</li> </ul>   |           |
| <b>Consultant: Envisioneering, Inc., King George, VA</b>   | 2006-2008 |
| <ul style="list-style-type: none"> <li>Consulting services to clients of Envisioneering, Inc. related to homeland security, including completing a successful homeland security application for the Territory of Guam and assisting Los Angeles County Sheriff Dept. in a successful emergency exercise (simulation).</li> </ul>   |           |
| <b>Deputy Manager, Denver Dept. of Parks and Recreation</b>  | 2001-2003 |
| <ul style="list-style-type: none"> <li>Mayoral appointment to assist a new manager in addressing numerous scandals and operational problems in the agency.</li> <li>Addressed and solved numerous audit deficiencies while rebuilding employee morale.</li> <li>Areas of emphasis included finance, legislation, media relations, drought &amp; water conservation, community partnerships, business processes, etc.</li> </ul>  |           |

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| <b>Education</b> | <b>Juris Doctor</b>   | University of Denver |
|                  | <b>Master of Business Administration</b>  | University of Dayton |
|                  | <b>Bachelor of Science (physics)</b>  | University of Dayton |
|                  | <b>Continuing Study:</b>  |                      |
|                  | <ul style="list-style-type: none"> <li>Negotiation and labor negotiation - Harvard Negotiation Project, Boston, MA.</li> <li>Mediation Training – Center for Dispute Resolution, Boulder, CO; and 40-hour program with Continuing Legal Education of Colorado (2009).</li> <li>Arbitration Training - American Arbitration Association, Denver, CO.</li> <li>More than 450 hours of continuing legal education</li> </ul> |                      |

### **Additional Skills & Training**

- Public speaking, facilitation, group exercises, teaching, coaching, writing, editing
- Quantitative analysis, including statistics, high-level algebra, and other tools.
- Development of press releases and other documents intended for general public and media use as well as experience in TV and radio interviews and appearances.

### **Other information available on request:**

- Employment prior to 2001
- A variety of special assignments by several Mayors
- Current volunteer activities: Board of Trustees for Caring for Colorado Foundation, high school soccer official

## **Exhibit B: Synopsis of Key Professional References**

**Kelly Jean Brough** - 303 534-8500 – [Kelly.Brough@denverchamber.org](mailto:Kelly.Brough@denverchamber.org)

President & CEO: Denver Metro Chamber of Commerce (Former Chief of Staff: Denver Mayor Hickenlooper)

*“Marty distinguished himself as the person to call upon when challenges faced the organization. He served in the role of Deputy Manager of Parks and Recreation for Mayor Webb. He approaches any analytic task with an exacting eye that is scientific, thorough, and meticulous.*

*“Most recently, I worked with Marty when he took over as head of the regional Urban Area Security Initiative. He was the perfect person to get this effort off the ground and build strong alliances and relationships which will outlast all of us in the region.*

*“The hallmark of Marty’s character is his integrity. He is always honest in his feedback and seeking opportunities for personal growth and development.”*

**James Mejia** – 303-905-9671 – [james@mejiaassociates.com](mailto:james@mejiaassociates.com)

Former Manager of Denver Dept. of Parks & Recreation

*“Marty Flahive and I worked together in the Department of Parks and Recreation for the City of Denver from 2001 to 2003. Marty and I were selected by the Mayor to turn around a department rife with corruption and bad decision making.*

*“Marty was selected as the department’s Deputy because of his unquestionable integrity, his tenacious work ethic, familiarity with many different city agencies and processes and his ability to model best practices for corporate culture to fellow staff members.*

*“As an attorney, Marty was frequently the voice of reason in the department; able to bridge competing interests and move us forward with his newly created common goals.*

*“Marty’s efforts were indispensable. Given his versatility and work ethic, he would be a welcome addition to any organization that values leadership and creativity with integrity.”*

**Alvin J. LaCabe** – 720-413-2069 – [allacabe@q.com](mailto:allacabe@q.com)

Former Denver Manager of Safety

*“I wanted to take this opportunity to express my deepest appreciation to you for your outstanding leadership as Director of the Denver Urban Area Security Initiative ... Program. Your professionalism, analytic skills and commitment to metropolitan cooperation has resulted in a model that is recognized nationally as one of the top Urban Area Security Initiative programs. Without your tireless efforts and ability to bring people together to work collaboratively for the common good, the UASI program would have been just another federal grant.”*

**J. Grayson Robinson** – 303-880-2201 – [graysonrobinson@msn.com](mailto:graysonrobinson@msn.com)

Former Arapahoe County Sheriff

*“Mr. Flahive has set an exceptional example of conducting the business of government through the effective and efficient application of his well-considered business and legal perspective.*

*“As a result of his diverse experience, education, training and exceptional understanding of the requirements associated with meaningful community/government partnerships, Mr. Flahive is uniquely qualified to successfully accomplish the responsibilities associated with the mission of your organization. Through his exceptional leadership skills, professionalism and dedication to making a difference, Mr. Flahive has earned the respect and support of his colleagues, as well as the community.”*

## **Exhibit C: Testimonial Quotes from Flahive LinkedIn Profile**

**Eileen Gomez: Human Resources Manager at North Metro Fire Rescue District – 303-452-9910**

As the Labor Relations Director working for the City of Boulder, I hired Marty to help us with an objective of our 2015 negotiations with the police union. Our salary structure was outdated and we wanted to raise our entry salary to be more competitive. We were already a leader in competitiveness at the maximum. We needed to find a way to do this without moving the entire structure at an exorbitant cost, without allowing more junior officers to leap frog those hired earlier and by getting union buy in to achieve contract ratification and preserve the relationships. Marty worked numerous scenarios in detail including CBA, quickly established credibility with both police management and the union and helped us find a successful solution that also met union's objectives. He was timely, responsive, thorough and met with the union for transparency and to help them understand the complex proposal. With Marty's help, we got it done. I highly recommend Marty for challenges such as these that require analytics, creativity and cost considerations.

**Reeves Brown: Principal, Synergy Solutions • Organizational Mgmt • Consensus Building • Meeting Facilitation • Policy Advocacy – 970-216-6255 – [brownreeves@gmail.com](mailto:brownreeves@gmail.com)**

I really appreciate Marty's comfortably engaging nature and thought-provoking mindset. We contracted with Marty to help guide us through a rework of our department's Strategic Plan when I was Executive Director of the Colo Dept of Local Affairs. Marty engaged our entire leadership team, both collectively and individually, and helped us develop a new Strategic Plan that not only met all of our external public demands, but more importantly, Marty's product resulted in a Plan that provided a workable roadmap to guide each of our Divisions in a way that effectively weaved together our Mission Statement, our Long-Range Goals, our Annual Plan, our Performance Metrics, and our day-to-day "To Do" lists so that we knew we were focusing on the right work for the right reasons at the right time

**Rick Cruz: Senior Program Manager at PEMDAS Technologies & Innovations, PMP, LSSGB-C – 719-352-8109 – [EnriqueECruz@icloud.com](mailto:EnriqueECruz@icloud.com)**

A high-energy leader who truly cares for people, Marty Flahive is a strategic thinker who can work nationally or internationally at the highest levels of government, business and industry. He is passionate about performance and delivering outstanding results - I observed this first hand while working closely with him to address challenging Homeland Security issues on the territory of Guam and in support of the Los Angeles County Emergency Operations Bureau. Marty has superb communication skills and a unique ability to reflect upon his vast experience to identify best solutions to complex issues and problems. He is a genuine pleasure to work with and a true professional in all regards. He has earned my strongest recommendation for his professional competence and steadfast commitment to excellence in all endeavors.

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**James Mejia: President and CEO at Mejia Associates, Inc. 303-905-9671 – [james@mejiaassociates.com](mailto:james@mejiaassociates.com)**

Marty Flahive is one of the most dedicated and capable public servants with whom I have worked. 6 day work weeks over the course of 2.5 years was our regular course of business, reforming our department while in the midst of expanding the city's parkland by 50% and building or renovating 6 new recreation centers. None of our departmental progress could have been possible without Marty's leadership in financial planning and budgeting, strategic resource deployment, human resource management, and role modeling the very highest of ethical standards. Despite tough conditions, long hours, and at times a vociferous constituency, we had a great time in the Department. Marty helped to create a productive environment throughout the Department.