



**RJA Management Services**

February 24, 2020

Mr. David Stoldt  
General Manager  
**MONTEREY PENINSULA WATER MANAGEMENT DISTRICT**  
5 Harris Court Building G  
Monterey, CA 93940

Dear Mr. Stoldt,

RJA Management Services, Inc. is interested in facilitating a *Strategic Planning Workshop* for the Monterey County Peninsula Water Management District Board of Directors and General Manager. Normally, these workshops are designed to:

- **Build Trust, Understanding and Commitment** to a common way of doing business;
- Define or clarify the organizational **Vision and Mission**;
- Clarify **Roles, Working Relationships, and Communication**;
- Review Organization **Goals, Strategic Initiatives, Timelines**, and,
- Discuss **Challenges** facing the Organization and **Opportunities** for meeting expectations.

Strategic Planning is a process for defining an organization's future direction and making decisions on how and where to allocate resources. Strategic Planning is a beginning, not an "end all." The ultimate plan can and will be modified as priorities and unanticipated events occur. RJA does not have "canned" strategic planning programs. Programs are developed specifically for an organization around current organizational issues, challenges and opportunities. Information gathering sessions are conducted with each Board Member, the General Manager and any other designee prior to formulating a final workshop agenda, developing workshop materials, and/or designing group exercises. Upon conclusion of the information sessions and workshop planning, I will facilitate the workshop and provide a final report.

Our fee for conducting the strategic planning workshop is \$9,605.00 plus expenses. The hourly consultant fee is \$185. Attached is a detailed breakdown of proposed tasks and costs. The proposal does not include costs associated with rental of a meeting facility and/or equipment, travel, lodging and meals. The District initially will be billed for consultant fees and expenses upon completion of the information gathering and workshop planning tasks, with final billing for consultant hours and expenses upon completion of the workshop. I am available to conduct the information gathering sessions the latter part of April and facilitate the workshop the first week in May.

The attached proposed cost is for up to nine information gathering sessions, one full-day workshop, and follow-up reporting. Any changes to this proposal are open for discussion and negotiation.

EXHIBIT 5-A

Once again, thank you for giving us the opportunity to submit a formal proposal to conduct the Monterey Peninsula Water Management District Board of Directors strategic planning workshop. My prior work facilitating strategic planning workshops, working knowledge of Monterey County, and recognized expertise in human resource management can be of value to the Monterey Peninsula Water Management District in this important endeavor. Please feel free to call me if you have any questions or need additional information.

Sincerely,



Dr. Richard L. Garcia  
President

RLG:SB:jg

Attachment

**MONTEREY COUNTY WATER MANAGEMENT DISTRICT  
BOARD OF DIRECTORS AND GENERAL MANAGER  
2020 STRATEGIC PLANNING WORKSHOP  
RJA ESTIMATED COST**

<b>TASK/EXPENSE</b>	<b>HOURS</b>	<b>COST</b>
Board of Directors/Staff Interviews	11	\$2,035.00
Workshop Preparation	14	\$2,590.00
Travel to and from Monterey Peninsula Water District (2 Trips)	8	\$1,480.00
Strategic Planning Workshop	8	\$1,480.00
Final Report	8	\$1,480.00
Clerical Support @ \$45 per hr.	12	\$540.00
<b>Estimated Total Consultant/Clerical Time/Cost</b>	<b>61</b>	<b>\$9,605.00</b>
<b>Plus Clerical and Travel Expenses (photocopy, US postage, FedEx, lodging, meals, air fare, car rental, etc.)</b>	<b>TBD</b>	<b>TBD</b>