

## Service Proposal

*We are pleased to present a service proposal to work with the Ruston City Council to facilitate an Annual Planning Retreat in August or September of 2024 (date TBD).*

**Organization:** Ruston City Council

**Contact:** Jennifer Jensen

**Proposal Date:** 6/2/2024

**Project:** Facilitate Annual Planning Retreat

**Proposed Contract Period:** June 15, 2024 - September 30, 2024

### Scope of Services

The Callahan Collaborative will work with Jennifer Jensen and others on the Retreat Planning Committee (RPC) to:

- 1) Design and facilitate an Annual Planning Retreat for the City Council and Mayor to:
  - a) Review, refine, and reprioritize short- and long-term goals established at last year's retreat.
  - b) Develop a long-term vision for the City of Ruston.
  - c) Increase relationships and mutual understanding between members.

The Callahan Collaborative will:

- 2) Conduct 15 to 30-minute virtual interviews with the City Council Members and Mayor before the retreat to obtain relevant insights.
- 3) Capture and provide a written summary, key takeaways, and next steps from the retreat.
- 4) After the retreat, meet with the retreat planning team to review the meeting summary and recommendations for the next steps.

**Communication and Delays** -To ensure timely and efficient services, The Ruston City Council agrees that Jennifer Jensen is the authorized point of contact working with the Callahan Collaborative to complete the work. The Callahan Collaborative will communicate directly with the contact person throughout the contract period.

The Callahan Collaborative's President, Robin Callahan, will contact the point person for this project throughout the engagement timeline. Communication will primarily be through email and Zoom and, when appropriate, in person. The Callahan Collaborative will also inform the Ruston City Council in writing of any action, request, or circumstances resulting in additional fees.

The Parties shall preserve as strictly confidential and proprietary all information and material, whether or not marked as confidential, including but not limited to information, materials, strategic plans, or other information that the Parties may provide one another (collectively "Confidential Information"). The Parties agree that in the event of a breach or threatened breach of this section, the other Party's business may be irreparably harmed.

**Completion Criteria** - The Callahan Collaborative will have fulfilled its obligations when any of the following occurs:

- The Callahan Collaborative accomplishes the activities described within the above "Scope of Services." The Client accepts such activities and materials without unreasonable objections. No response from the Ruston City Council within 10 business days of the end product being delivered by The Callahan Collaborative is deemed acceptance.

### Fee Summary and Payment Schedule

The engagement fee is based on The Callahan Collaborative's understanding of the scope of work. If the scope of work changes, we will discuss any necessary adjustments with you.

As described, the scope of the work will be \$2,500. The Ruston City Council will be invoiced twice in equal installments of \$1,250. The first installment is due immediately upon contract signing to hold the agreed-upon date. The second installment is due 15 days after the facilitation engagement.

The mileage fee for in-person meetings will be billed at the IRS rate of .0655/mile.

**Next Steps** - To proceed with this project, the Ruston City Council is required to take the following steps:

- Notify us of your acceptance of this proposal and provide the contact information for an authorized signer for the Ruston City Council or the City of Ruston.
- TCC will send a contract via DocuSign.
- The authorized signer will indicate acceptance by signing and dating the contract.
- Please note that changes to the project's scope can be requested and approved in writing at any time, but additional charges may apply.

Once these steps have been completed, The Callahan Collaborative will confirm receipt of the contract and schedule our initial planning meeting.



Robin Callahan, CFRE, CAP, CEFL  
The Callahan Collaborative