

## Exhibit B

### Williamson County Strategic Plan

### Phases, Tasks, Deliverables and Pricing

Revised 10.19.22



Phases and Tasks		Deliverable	Proposed Dates (To be finalized)	Cost	
Phase 1 -Process Design, Foundational Work, Process Approval					
Task 1.1	Kickoff and Logistics Meeting (Zoom) - 2 hour meeting	Logistics meeting to review framework, process, milestones and deliverables	Week of August 22	\$	1,500.00
Task 1.2	Weekly planning meetings (Zoom) and emails throughout the project	For updates, feedback, course correction	August 29 - January 31	\$	5,000.00
Task 1.3	Creation of Engagement and Outreach Plan with Williamson County Core Team	Engagement and Outreach Plan (internal and external)	September 23, 2022	\$	500.00
Task 1.4	Commissioner Meeting #1 (Zoom)	Virtual meeting, to review and approve process	Week of September 26, 2022	\$	750.00
Task 1.5	Project Management Plan Created and Approved	Project Management Plan	September 23, 2022	\$	500.00
			TOTAL PHASE 1	\$	8,250.00
Phase 1 Deliverable: Approved engagement process and plan and project management plan					
Phase 2 -Document Review, Engagement and Outreach					
Task 2.1	Review documents from County	County coordinates all relevant documents for review (budget, plans, information)	September 16, 2022	\$	1,000.00
Task 2.2	Recommended partners for engagement	County provides a list of organizations and contacts provided for outreach	September 19, 2022		
Task 2.3	Recommended list of interviewees (15)	County provides names, titles, emails and phone numbers of internal stakeholders to engage	September 19, 2022		
Task 2.4	Create draft and final interview questions	Internal and external interview questions	August 29 - September 16	\$	1,500.00
Task 2.5	Internal Survey: Create draft staff and final internal survey questions for approval, release and monitor survey	Internal elected official, department head and staff survey questions (3 separate surveys)	August 29 - September 16	\$	3,000.00
Task 2.6	External Survey: Create draft and final community/partner survey questions for approval, release and monitor survey	Community, partners and stakeholders (1 survey)	August 29 - September 16	\$	1,000.00
	Note: survey and interviews will take place AFTER full approval on September 16	Survey commences and interviews start, ongoing through end date	September 17 - October 21		Information
Task 2.7	Personal interviews (in person, Zoom or email)	Gather input from all 5 Commissioners on priorities in up to one hour interviews. Billing includes all emails and outreach necessary to schedule, scheduling software, and administrative support which will be billed regardless of interview taking place.	October 3 - November 4	\$	1,000.00
Task 2.8	Specific Department/Office Focus Group Engagement (in person)	10 focus groups up to 2 hours each: 15 in attendance each time (for elected official and department directors)	October 10 - 14	\$	15,000.00
Task 2.9	External Stakeholder Focus Groups (in person)	4 focus groups up to 2 hours each for managers, mayors and/or other stakeholders, 15 in attendance each time	October 10 - 14	\$	6,000.00
Task 2.10	Full report of engagement data: interviews and surveys	Engagement Report with themes, priorities, and areas of concern	October 31, 2022	\$	2,000.00
Task 2.11	Additional Focus Groups	3 additional focus groups up to 2 hours each: one internal, one external. Information to be compiled for final Focus Group report.	November 16, 2022	\$	4,500.00
			TOTAL PHASE 2	\$	35,000.00
Phase 2 Deliverable: Community engagement materials, Engagement Report, survey results and documentation, open houses, focus groups					
Phase 3 - Facilitated Strategic Plan and Implementation Plan Meetings					
Task 3.1	One day retreat to complete all the details of the Strategic Plan (in person)	1 full day meeting (Between 6 - 8 hours total)	January 25, 2023	\$	14,500.00
Task 3.1.1	Commissioner Meeting to Define Vision, Mission, Values	4 hour meeting	January 24, 2023	\$	5,000.00
Task 3.1.2	Team Building Component Separate from Strategic Planning	Team development conversation and activities	January 24, 2023	\$	2,500.00
Task 3.2	Key Focus Area team meetings to craft the Implementation Plan details (in person)	5 meetings, up to 4 hours each	February 6, 7, 8, 9	\$	18,000.00
			TOTAL PHASE 3	\$	40,000.00
Phase 3 Deliverable: Facilitated meetings for Strategic Plan and Implementation Matrix					
Phase 4 - Create and Review Documents					
Task 4.1	Strategic Plan Framework Draft	Draft document	February 1, 2023	\$	3,000.00
Task 4.2	Commissioner Meeting #2 to Review Draft Plan (Zoom)	Virtual meeting, up to 2 hours	Week of February 13	\$	750.00
Task 4.3	Internal staff review and meetings for feedback	SBrand provides template, agenda and information for elected officials and department heads to hold internal meetings	Week of February 13	\$	500.00
Task 4.4	Strategic Plan Revision #1	Revisions based on Williamson County feedback. All feedback to be email to SBrand on form provided, in one email with one attachment	By February 20, 2023	\$	1,500.00

8 - 10, 12 - 2, 2:30 - 4:30 (external)

Task 4.5	Strategic Plan Revision #2	Revisions based on Williamson County feedback. All feedback to be email to SBrand on form provided, in one email with one attachment.	By February 27, 2023	\$	750.00
Task 4.6	Strategic Plan final and printing	Hard copy final strategic plan in color with graphics - 50 copies full color, spiral bound, assumes 30 pages. Pricing is proposed at actual printing cost plus staffing time	March 5, 2023	\$	3,000.00
Task 4.7	Implementation Matrix and Plan	Final Xcel spreadsheet matrix with Key Focus Areas, Strategic Goals, SMART Objectives, Owner. May have Action Steps, may have KPI's depending on work done by County.	March 5, 2023	\$	3,000.00
Task 4.8	Executive Summary with Recommendations	Report: Executive Summary of Strategic Plan	Late March, 2023		Included
Task 4.9	Commissioner Meetings #3 and #4 (one Zoom, one in person)	2 public hearings, up to 2 hours each, with formal presentation of strategic plan (1 virtual, 1 in person)	Late March, 2023	\$	1,500.00
TOTAL PHASE 4				\$	14,000.00
Phase 4 Deliverable: Draft, Final with Native Files Strategic Plan with Implementation Documents					
Total				\$	97,250.00

Total Not to Exceed Cost for Project (does not include travel)		\$	97,250.00
Travel Costs	5 separate trips: October 10 - 14 (3 facilitators), November 16 (1 facilitator), January 24/25 (3 facilitators), February 6/7/8/9 (2 facilitators), January presentation (1 facilitator)	At cost, estimated at \$18,500 maximum	
	Meetings are categorized as either all in person or all virtual (all participants and facilitators are 100% in person, or all participants and facilitators are 100% virtual) If the client changes any in person meetings to hybrid (participants are BOTH in person and virtual), additional cost will be invoiced at \$100 per hour for hybrid facilitator and support		

Optional Ongoing Support and Implementation		Does not include travel, does include supplies			
Monthly conference calls, customized templates	Monthly video conference, written templates, all emails and phone calls, individual and team support				Included
Quarterly Review and Update Meeting	5 (1 per KFA) 3 hour meetings to update the Implementation Plan	\$		11,250.00	
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Updates to Strategic Plan and Implementation Plan as Needed	Done by graphic designer, presented in a public meeting for consideration	\$		1,500.00	
Deliverable: Full Year of Ongoing Support and Implementation Meetings				\$	46,500.00

Title	Description	Hourly Rate	
Certified Master Facilitator	Holds a Certified Master Facilitator and at least 10 years of facilitation experience	\$	350.00
Certified Facilitator	Holds a certification in facilitation and at least 10 years of facilitation experience	\$	250.00
Lead Facilitator	Has at least 10 years of facilitation experience	\$	150.00
Certified Virtual Facilitator	Holds a Certified Virtual Facilitator, will assist in virtual or hybrid meetings	\$	75.00
Administrative Support	Any and all administrative support	\$	50.00
Graphic Design Support	Original graphic design for documents, social media	\$	75.00
Communications Support	Creating messaging and content for social media or other communications (press releases, internal or	\$	75.00

Note: hourly rates include all overhead, software and technical support, and all costs.