



iBossWell, Inc.
2809 W. 86th Str.
Leawood, KS 66206
913-980-3122

Jonathan Douglass
Management Assistant
City Manager's Office
PO Box 708
Lawrence, KS 66044

November 7, 2005

Dear Jonathan:

I was delighted to speak with you and Debbie and hear of your interest in my services for facilitating your annual goal setting sessions. The following is a preliminary proposal for supporting this effort. Please know that we are very flexible with our services and would be happy to adjust this proposal based on further conversations with you, in order to best meet your needs. Additionally, I have included a brief description of the services we provide, to help serve as further background of our qualifications and capabilities. Also included in this document: iBossWell® client list; my consultant profile; client referrals/testimonials.

I hope you find this useful in your decision-making. I look forward to hearing back from you after you have had the opportunity to share this information with other members of your committee. I truly appreciate the opportunity to provide this proposal.

Sincerely,

Denise

Denise McNerney, M.A.
CEO

Enclosures:

Preliminary Proposal - pages 2 – 3
iBossWell Services Overview – pages 4-6
iBossWell Client List – page 7
Primary Engagement Partner Bio – page 8
iBossWell Client Referrals – page 9 -14



**Preliminary Proposal for Consulting Services for
City of Lawrence, KS
November 7, 2005**

Proposed Project

I understand your current desire is to conduct two ½-day long sessions, with a focus on goal setting for the upcoming year. In order to support this process most effectively, I would also recommend pre-planning phone conversations with each meeting participant. Such interviews can serve as a discovery and information gathering process around key questions or issues the organization or team may be facing. This in turn can inform our process for planning the off-site agenda. Interview questions will be drafted/developed by consultant and reviewed/approved by client. Additionally, a summary/aggregate report of findings will be provided.

Proposed Deliverables and Budget

Deliverable	Timeframe	Comments	Budget
Pre-meeting phone interviews with meeting participants. Summary report of interview findings.	20 – 35 minute phone interview between participant and consultant	Include 5 members of the City Commission plus approximately 3 to 5 executive staff.	\$800
Meeting agenda development	1 or 2 one to two-hour meeting(s) with designated staff - Additional phone calls/emails as needed	Ensure discussion topics and activities best meet the needs of the working group.	Included in meeting budget below
Day-long off-site meeting facilitation	2 half-day (4 hour) sessions	All printed materials are included.	\$2000
Documentation of goals developed during meeting	Documents to be delivered within 10 working days of meeting.	Provided in format currently used on website.	Included in meeting budget above

GENERAL TERMS AND CONDITIONS OF AGREEMENT

1. The Consultant will provide consulting services in a professional manner.
2. At the beginning of the project, the Consultant will provide an orientation for the client as appropriate. The Consultant will also propose an evaluation method to be used at the conclusion of the project and requests the client's staff to participate in the evaluation as appropriate.
3. The Consultant will hold as private and confidential any written or verbal information received from or regarding the client (including but not limited to all research results, the needs assessment, interviews, and any plans or other shared documents) unless the client has made such information

public or unless a waiver is received from the client.. The Consultant assumes the right to include the client's name in Consultant's lists of client organizations. The client may request in writing to be excluded from such lists.

4. The client will commit required staff and other resources for the project.
5. The Consultant has based the estimate of fees on certain assumptions that have been conveyed from discussions with the client. If those assumptions are not correct, and the Consultant would need to perform more work than anticipated, the Consultant will notify the client to discuss a change order and related fees.
6. This agreement constitutes the terms and conditions of agreement. Any change, modification or alteration of this agreement must be made in writing and signed by both the Consultant and the Client.

ACCEPTANCE OF AGREEMENT

Consultant

City of Lawrence

By: _____
Denise McNerney
CEO
iBossWell, Inc.

By: _____

Title: _____

Date: _____

Date: _____



iBossWell® Background Overview of Services

iBossWell provides expert, hands-on consulting support to nonprofit organizations, including:

- Strategic Business Planning
- Board Development
- Organizational Development
- Leadership Development
- Leadership Coaching
- Retreat Facilitation
- Collaboration-building
- Merger Facilitation
- Project Management

We believe that an integrated approach is the most effective way to develop the leadership and vision needed to take your organization to the next level of success. (See *Attachment A*, page 5)

iBossWell, Inc. is a strategic planning and leadership development organization, focusing on integrating strategy with leadership development for effective plan execution. We believe our planning, training, coaching and mentoring capabilities will be a great fit for your meeting your organizational needs. iBossWell® offers extensive planning and leadership development services, including customized on-site workshops and support/mentoring/coaching in a unique business format, providing “real-time” and “as needed” support and reinforcement for leaders on important leadership issues

A critical process for successful business outcomes is the creation and implementation of plans. Effective leadership guides this process through aligning all activities with the plan and providing the support and resources for their teams to successfully accomplish that plan. This takes high-level skills, including team leadership and people development, as well as keen business acumen. A culture supporting this level of leadership is a key ingredient to successful full-scale organizational implementation. iBossWell® can help an organization transform their individual leaders, board and teams into such a culture.

A Fully Integrated Approach

We applaud you for having the vision and understanding to want to develop a framework by which your leadership and staff can operate and be accountable in moving forward in taking the organization to the next level of growth and achievement. Although the following goes beyond the scope of a one or two day retreat, I would like to share with you some of the critical factors that are important to consider when leadership plans strategy and tactics for an

organization. Since iBossWell® has expertise in these areas, we can ensure that your high-level planning includes accommodating for development in these areas in the future.

- **High-level planning** – Creation/refinement of strategy and tactics are critical to guiding where you need to go and how you are going to get there:
 - Development of a strategic/business/operational plan(s);
 - Alignment across the leadership team behind the plan & it's key elements;
 - Review/refinement of Vision & Mission;
 - Clarity with Board of Directors regarding role/responsibilities for plan management/support/implementation.
- **High-impact leadership** - High level leadership skills and abilities:
 - Deeply engaged and focused Board of Directors;
 - Effective communication and leadership skills to ensure appropriate support to all staff in achieving the goals at all levels: corporate, departmental, team and individual;
 - Understanding of the change management process;
 - Conflict resolution;
 - "Straight talk"/Difficult Conversations;
 - Creation of a culture of leadership development, where leadership skill development is institutionalized in all employee development, and systems are in place to identify and further develop those with high potential.
- **High-performing teams** - Significant challenges face your teams and their leaders: as your teams are most likely highly interdependent with complex relationships and working toward common goals with imperfectly matched values and different ideas about how they ought to do things. Teams must be able to:
 - Understand the value and components of performing complex tasks requiring a high degree of interdependence and cooperation among group members;
 - Identify symptoms of destructive or counterproductive activity;
 - Prescribe and initiate actions to move the team toward high performance.
- **High staff performance** - Understanding and alignment across all staff around the plan, priorities, focus and the teamwork required to effectively accomplish the goals and objectives, including:
 - Individual leadership...taking initiative;
 - Understanding of the "big picture" for the office;
 - Clear understanding of their individual role and responsibilities in contributing to accomplishment of the plan;
 - Conflict resolution;
 - Communication, team, and technical skills to successfully make their contribution.
- **Highly effective systems** - Systems that support successful achievement of the plan:

- o Clearly articulated *Performance Support System*;
- o Compensation System aligned with Performance Support System;
- o Clear position descriptions and accountabilities;
- o Ability to measure improvement achieved through key initiatives.

In summary I hope this information has provided a high-level description of the scope of services we can provide. We understand that each organization's needs are unique, and customize our approach based on your specific issues and desires. Therefore, in some cases we bring the full array of services described above and in other cases, only bring select services.



iBossWell® - Examples of Clients¹

AAFP/F - American Academy of Family Physicians Foundation
ACCP - American College of Clinical Pharmacology – *New York*
Alphapointe Association for the Blind
American Society of Health Systems Pharmacists Foundation - *Bethesda, MD*
A Rising Tide – Kansas City Health Foundation
Arts Council of Metropolitan Kansas City
AstraZeneca Pharmaceuticals – *Wilmington, DE*
Business Committee for the Arts – Kansas City
California Pharmacists Association – *Sacramento, CA*
CPhA Educational Foundation – *Sacramento, CA*
Center for the City - UMKC
Center for Management Assistance
Community Care Foundation of NW Arkansas – *Springdale, AR*
Domestic Violence Network
EMD Pharmaceuticals – *Durham, NC*
Epsten Gallery at Village Shalom
FirstGuard Health Plan
Folly Theater
Food and Drug Administration – US Government – *Rockville, MD*
Foundation on Aging
Friends of Johnson County Developmental Supports
Friends of Johnson County Nursing Center, Inc.
Friends of the Library – UMKC
Heart of America Family Services
Jewish Community Foundation
Jewish Family & Children's Services
Johnson County Developmental Supports
Kansas City Ballet
Kansas City Public Library
Kaiser Permanente Watts – *Los Angeles, CA*
Lied Discovery Children's Museum – *Las Vegas, NV*
LULAC National Education Service Centers
Medimetrix, Inc. – *Cleveland, OH*
Merck KgaA - *Darmstadt, Germany*
Missouri Pharmacy Association – *Jefferson City, MO*
Nemaha County Training Center – *Seneca, KS*
Northwest Arkansas Children's Shelter – *Bentonville, AR*
Rocky Crook Horses Help - *Bentonville, AR*
SkillBuilders Fund
Swope Community Enterprises (Swope Parkway Health Center)
UMKC Pharmacy Foundation
University of Missouri – Kansas City / School of Pharmacy
University of Southern California – *Los Angeles, CA*
Wildwood Outdoor Education Center
Women's Foundation of Greater Kansas City

¹ Unless otherwise noted, client location is within the Greater Kansas City Metropolitan Area

DENISE M. McNERNEY
Summary of Business Consulting Experience

Business Consultant specializing in organizational change, leadership, team development, and executive coaching. Demonstrated ability to implement current best practices in multiple business areas. Denise, currently CEO of IBossWell, Inc., has more than 25 years of experience leading business operations and coaching managers in sales, marketing, strategic planning, healthcare service delivery, business operations, team dynamics, and customer relations in both not-for-profit as well as for-profit organizations. She is currently co-authoring the book, "Boss Isn't Just a Four-letter Word", including the PeoplePACT™ Process and Principles of Humane Leadership, which is a culmination of her extensive experience in leadership development.

- **Leadership and Organizational Development & Change Management** Offers insight and services in leadership and management training issues, mergers and joint venture facilitation, change management, strategic planning, performance based management, Board Development, motivation, improved professional satisfaction, work/life balance, team building, and conflict resolution/transformation. Has had demonstrated results in all these areas. Special expertise in co-leadership or "partner leadership," a frequent result of mergers and acquisitions. Has experienced the phenomenon firsthand, written about it and consulted regarding the advantages and challenges of partner leadership. Served as executive coach and mentor for a number of leaders.
- **Business Operations and Development** In her last corporate position: directed all business operations of national and regional accounts; book value of \$4+ billion. Interviewed, hired and developed hundreds of managers during an 18-year corporate career. In last corporate position was responsible for the business activities of more than 200 associates including 17 corporate directors.
- **Team Development** Extensive experience developing high performance teams, including senior leadership, front-line operational and Boards of Directors; during tenure at Astra Merck, the company was recognized by the *Harvard Business Review* as being a cutting-edge team-based organization.
- **Planning and Program Design** Has facilitated strategic, business and reorganization planning with a number of organizations, taking them from needs assessment, situational analysis all the way through to strategy development, redesign and implementation, including merger restructuring. Additionally, has experience in managing program design, implementation and evaluation.

Facilitation In addition to facilitation of many business and planning processes, Denise has also proven invaluable in a number of organizations by facilitating the resolution of multiple problems and needs through integrating the many components involved. Her keen understanding of both business and people dynamics coupled with her adept skills at bringing them into and maintaining balance, ensures peak performance and high satisfaction levels. She has accelerated business results by approaching conflict resolution in a new way known as conflict transformation.

Denise has consulted with a number of organizations, in the not-for-profit as well as for-profit arenas. Examples include American Academy of Family Physicians Foundation, FDA - Office of Clinical Pharmacology and BioPharmaceutics, UMKC Pharmacy Foundation, Arts Council of KC, Center for Management Assistance, University of Southern California, Lied Discovery Children's Museum, Heart of America Family Services and LULAC National Education Service Centers. She has also held executive level leadership positions with IBossWell, Inc., AstraZeneca, Astra Merck, Kaiser Permanente, and Kansas City Health Care.

iBossWell, Inc.
Client References & Feedback



May 27, 2003

Denise McNerney
iBossWell, Inc.
2809 W. 86th Street
Leawood, KS 66206

Dear Denise:

As chairperson of the strategic planning committee of The Performing Arts Foundation/ Folly Theater, I'm writing to express our thanks to you for your guidance and leadership in the development of our plan.

You brought a good structure and approach to the process, and your facilitation of the planning sessions was effective in bringing out good ideas and keeping us focused and on schedule. You were quick to pick up on the issues we face as an organization and the various perspectives the members of the planning committee brought to the task. You clearly earned the confidence, trust and respect of the participants. Your responsiveness to our questions, comments and concerns was much appreciated.

We also appreciate the board and staff development assistance you provided along the way. You spotted some weaknesses that could have interfered with successful completion and implementation of our plan and helped us address them in a prompt and succinct manner. You also helped us increase the level of engagement of some of our newer board members, and I believe helped us identify some new leaders for the organization in the process.

Thanks again for helping us strengthen our organization.

Very truly yours,

Marvin Rau
Planning Committee Chair
The Performing Arts Foundation/Folly Theater
Kansas City, MO



**FOUNDATION
ON AGING**
7312 Antioch, Suite D
Merriam, Kansas 66204

April 22, 2003

Denise McNerney, CEO & Founder
IBossWell
2809 West 86th Street
Leawood, KS 66206

Dear Denise:

The comments at the our meeting last week when our board members received our completed Strategic Business Plan document were indicative of how pleased we are with our finished product. Normally, it would take a minimum of six months for an organization to complete a strategic plan like we required. We know that it took a great deal of effort for you to do this in such a short period of time.

We want you to know that we are most appreciative of the extra time and skills you gave us. Our board is 100% dedicated to implement the plan we have developed, knowing that our future success depends upon following our plan. We will keep you informed of our progress

It was a pleasure to work with you. We hope that the attached Letter of Recommendation will assist you in gaining additional clients in the future.

Sincerely,

Carol H. Sader
President
Foundation on Aging



**FOUNDATION
ON AGING**
7312 Antioch, Suite D
Merriam, Kansas 66204

April 22, 2003

TO WHOM IT MAY CONCERN

To answer the request of a major donor, we needed a 4-year Strategic Business Plan, and we needed it immediately.

Denise McNerney, CEO & Founder of *IBossWell*, came to our rescue. When we first approached her, explaining that we needed help and a completed document we could present to our donor within six weeks, Denise's reaction was "It is not possible – this is at least a six – to - eighteen month project."

But she was willing to listen. On learning that a comprehensive Assessment Study had been completed just a few months earlier and on our agreeing to work with her by holding two six-hour long board retreats within two weeks, plus our Planning Committee and our staff, meeting with her weekly or more frequently as needed, she agreed to facilitate our program.

Denise plunged into work, giving our project unlimited hours. She led our two board retreats, worked overtime with our committee and our staff and as a result produced an outstanding finished product two weeks before our contract's deadline! One board member, who has worked with many leadership and strategic planning consultants, commented that the final document Denise gave us was in her experience one of the best and most complete she had seen.

If you are considering a leadership or strategic planning consultant, we unconditionally recommend that you look no further. Denise and her staff would be an asset on any team. I am sure it would be a decision that you will not regret!

Carol H. Sader
President
Foundation on Aging



To whom it may concern.

Denise McNerney has been a consultant working with Jewish Family & Children Services on Board Governance, Board Development, and Strategic Planning. Denise was engaged as our consultant in October of 2002 and was hired by the Governance Committee led by Bruce Goldstein, who is now our Immediate Past President. Denise displayed outstanding leadership in her style and manner from the outset of her relationship with JF&CS, as she would not agree to being engaged by the agency until she had interviewed the professional leadership, namely myself.

She is very honest and straightforward in working with groups and knows when and how to lead and when to let the group navigate their own path to resolution. She has a talent for learning the strengths of individuals and the groups with which she works and helps them focus on the larger strategic visioning of the agency.

Working with JF&CS, Denise has displayed remarkable leadership and works very well with the personalities involved in our lay and professional leadership structure. Denise is actually on her second engagement with our agency. When presenting the second contract to the Board of Directors, I explained to them that I felt this was something that we could not afford to pass on, as we needed facilitation in the completion of our strategic plan and issues of "simple governance". Many people, particularly on the staff (and some at the board) were not comfortable in having frank discussions with Denise; however, her style quickly allayed any fears. Denise has been a coach to the board and myself and has worked tirelessly to help build consensus and vision at the leadership level.

Best regards,

Todd A. Ephraim, Ph.D.
Executive Director
Jewish Family & Children Services
of Greater Kansas City
5801 W. 115th Street, Suite 103
Overland Park, Kansas 66211-1824
Phone (913) 327-8250
Fax (913) 327-8222

Examples of Email Feedback on iBossWell, Inc. Work

From: Marilyn Berenbom [mailto:merilynkb@hotmail.com]
Sent: Friday, June 18, 2004 8:53 AM
To: dmcnerney@ibosswell.com
Subject: RE: Request from Denise

Denise--I hope all went well yesterday. The celebration was wonderful and we are thrilled on the way you led us through the process. Hope to see you soon. Marilyn

From: Larry Lesko [mailto:leskol@comcast.net]
Sent: Sunday, February 06, 2005 6:49 PM
To: Denise Mcnerney
Cc: Sue Ulrich
Subject: ACCP Meeting

Denise:

Thanks so much for your energy, enthusiasm and quality of effort that went into your work for ACCP at the Executive Committee meeting and the Board meeting today. The most common remark that I heard from Board Members was that "this is really good, and it's just what we needed". The rest of the Board meeting, after you left, went great and the energy in the room was infectious. I hope you got home safely and without delay. I hope we can continue to connect as we "execute" the SP at ACCP.

Best,
Larry

Larry Lesko, PhD
American College of Clinical Pharmacology - Board President

From: Becky Blades [mailto:bblades@bladespr.com]
Sent: Tuesday, October 22, 2002 8:10 PM
To: Denise McNerney
Subject: Re: Thank You

Hello, Denise!

I want to thank you as well. And to compliment your expertise. I've seen few facilitators so effective in managing large, diversely skilled groups. You did an amazing job of handling the process. I know you've made a wonderful contribution to this group.

Becky

From: James Glynn [mailto:jglynn@thefamilyconservancy.org]
Sent: Monday, June 13, 2005 10:12 AM
To: dmcnerney@ibosswell.com
Subject: RE: Follow Up

Denise,

Thank you for your kind feedback. I'm very happy that you are getting the much-deserved acknowledgment you deserve for your leadership in our change process. You know, you are extremely good at what you do. I'm happy that you have permission to stay with us until at least October. You have done a super job challenging us to be as good as we can be. You also have modeled grace and dignity when tired / frustrated. We all feel good about our process to date, and thanks for sharing your thoughts with me.

Best wishes,
Jim

From: Suzanne LeBlanc [mailto:sleblanc@ldcm.org]
Sent: Wednesday, November 19, 2003 11:47 AM
To: 'Denise McNerney'
Subject: RE: Retreat

Hi Denise,
Just wanted to tell you that one of my board members who was at the retreat just e-mailed me that he was going to contribute \$1,000 toward continuing the work with you!
Suzanne

Suzanne LeBlanc
Executive Director
Lied Discovery Children's Museum
833 Las Vegas Blvd. North
Las Vegas, NV 89101
Phone: (702) 382-3445
Fax: (702) 382-0592

----- Original Message -----

From: "Suzanne LeBlanc" <sleblanc@ldcm.org>
To: "Denise McNerney (E-mail)" <dmcnerney@ibosswell.com>
Sent: Monday, November 17, 2003 6:15 PM
Subject: Retreat

Hi Denise,
You're a wonderful facilitator! I really appreciate your staying involved with us. One of my board members called already to say what a wonderful day Saturday was.
I will work on getting the notes I'm doing typed up in the next few days. Thank You!
Suzanne

Suzanne LeBlanc
Executive Director
Lied Discovery Children's Museum
833 Las Vegas Blvd. North
Las Vegas, NV 89101
Phone: (702) 382-3445
Fax: (702) 382-0592

From: Marken, Patricia A. [mailto:markenp@umkc.edu]
Sent: Thursday, June 27, 2002 10:58 AM
To: dmcnerney@ibosswell.com
Subject: Thanks

Denise,
Thanks for your hard work on the retreat. The issues that the divisions were greatly concerned about were heard and made the "cut". I have spoken to several faculty members and they found the two day retreat to be a positive experience. Thanks for keeping us moving forward on a good direction. Maybe I'll see you when I am out on a walk or bike ride, Trish

Patricia A. Marken, Pharm.D., FCCP, BCPP
Chair and Associate Professor of Pharmacy Practice
Associate Professor of Psychiatry
University of Missouri-Kansas City
Schools of Pharmacy and Medicine