



## CITY COUNCIL AGENDA MEMO

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Prepared By: John Cabrales Jr, City Manager

November 12, 2020

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### Organizational Assessment and Evaluation

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#### **DESCRIPTION:**

Consider and Act on a Resolution authorizing the negotiation and execution of a professional services agreement with The Lion Strategy Group, LLC for a comprehensive assessment and evaluation of the City of Lake Dallas.

#### **BACKGROUND INFORMATION:**

The City Council has requested a comprehensive assessment and evaluation of the City of Lake Dallas organization. Attached is a proposal by Mike Alexander, COO of LION Strategy Group, LLC. The proposal consists of an Abasement Phase: Assessment of the Lake Dallas Policies and Culture that includes conducting a system-wide survey using various survey instruments, conducting diagnostic meetings with internal stakeholders, and assessing existing ethical codes and policies. It also includes conducting diagnostic meetings with external stakeholders, and creation of a leadership organizational action plan.

The methodologies utilized by the Lion Strategy Group consists of a review of the City of Lake Dallas' mission, vision, and values, a series of diagnostic meetings with internal and external stakeholders, and a system wide survey covering the following areas:

- Team Cohesion and Effectiveness
- Organizational Climate
- Leadership and Followership
- Ethical Climate Survey

The feedback received during the on-site assessment is used to create a Leadership/ Organizational Action Plan that will cover the following areas:

- Organizational Development
  - o Leadership Transition Management
  - o Executive Coaching/Life Coaching
- Executive Sounding Board/Advising
  - o Creation of Culture Documents (if needed)
- Social Contract/Proclamation
  - o Structural Recommendations (if needed)

- o Policy Creation and Implementation (if needed)
- o Leadership Processes and Tools
- o Recruitment and Selection
- o Promotional Processes
- Team Development
  - o Group Development and Engagement
    - Building Resilient Teams
    - Communicating Through Conflict
  - o Interpersonal Communication
  - o Implementation of a Mental Model of Resilient Leadership

The LION Strategy Group has a wealth of experience with developing a variety of broad programs. Their comprehensive training curriculum is comprised of a hybrid of online and onsite training (if necessary), including recorded videos, discussion forums, quizzes, and other state-of-the-art resources that reinforce and solidify the learning in ways that contribute to group cohesion and vigorous adherence to the principles and precepts of the comprehensive ethics program.

The LION Strategy Group COO Mike Alexander is a nationally recognized expert in training and leadership coaching, a specialty that began and flourished during his 38-year career in law enforcement and has defined the years following his retirement from service. Through the U.S. Department of Justice Community Policing Divisions, the thirty six (36) Regional Community Policing Institute, the Multi-jurisdictional Counterdrug Task Force Training Center, the Federal Law Enforcement Training Center, the Texas Municipal League, the International Law Enforcement Administration, and the Texas Police Chiefs Association, he has traveled the nation training officers and community members on ethics and integrity. In 1999, he founded the LION Leadership Institute, with workshops focused on management, healthy work environments, employee wellness, emotional intelligence, and socialization. Now as co-founder of the Lion Strategy Group, Mike applies the substantive learnings and techniques of his life and multifaceted career to help others thrive.

A start as a Correctional Officer and Deputy Sheriff at the Travis County Sheriff's Office led to a 25-year tenure at the Austin Police Department, from which he retired as sergeant in 2009. Notable roles with the APD included serving as Patrol Corporal and Sergeant, and District Representative—where he was responsible for developing strategies to effectively address crime, fear of crime, and quality of life issues; he also led the APD's Continuing Education Division and the Leadership Command College and worked with the Louisiana Community Policing Institute, evaluating the effectiveness of community policing strategies for law enforcement agencies in the Gulf States. Following his police retirement, Mike worked as a Major in the Internal Affairs Section of the Texas Department of Health and Human Services Office of Inspector General, overseeing a statewide division primarily investigating state employees accused of abuse, neglect, and exploitation of elderly and mentally or physically incapacitated residents at state-supported facilities, as well as other state-funded operations.

Mike's cemented reputation in leadership and law enforcement management then led to a series of interim appointments in municipalities, where he provided pivotal stability during times of transition. He held terms as Interim Police Chief for the Texas towns of Jacksonville, Corinth, and Palestine; he also served as Interim City Manager and then City Manager for the City of Palestine.

Mike Alexander holds a bachelor’s degree in criminal justice and a master’s degree in organizational leadership. His certifications and affiliations include: Federal Law Enforcement Training Center (national certified instructor on ethics and integrity); Texas Commission on Law Enforcement (master peace officer and instructor); Multijurisdictional County Drug Task Force Training Center (national instructor); University of Texas Leadership Academy (graduate); International Association of Police Chiefs (trainer); Texas Police Chiefs Association (consultant); Texas Municipal League Intergovernmental Risk Pool (leadership consultant); and the Professional Christian Coaching Institute (Graduated). He is a Certified SYMBIS Assessor, certified marriage mentor, Enneagram Personality Practitioner.

**FINANCIAL CONSIDERATION:**

The project timeline and pricing proposed by the consultant is listed below. Staff will pay for this out of the Administration Department Budget but may need to do a budget amendment later in the fiscal year to cover these costs.

**Project Timeline and Pricing Matrix**

| <b>Item/Task</b>                                                                                                                         | <b>TIME FRAME</b>                                        | <b>Cost</b>     |
|------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------|-----------------|
| Abasement Phase - <b>Comprehensive Evaluation and Assessment</b>                                                                         | TBD<br>1 Week off-site (Survey Launch)<br>1 week on-site | \$10,000.       |
| Raid Phase - <b>Conduct diagnostic meetings with external Stakeholders Executive - Building Resilient Team Training</b>                  | TBD<br>1 week on-site                                    | \$10,000.       |
| Reconstruction Phase - <b>Expected Deliverables and Ongoing Assessment Practices Life/Leadership Coaching for executive team members</b> | TBD<br>1 week on-site<br>Coaching on going after on-site | \$10,000        |
| <b>TOTAL PROJECT COST</b>                                                                                                                |                                                          | <b>\$30,000</b> |

**RECOMMENDED MOTIONS:**

I move to **approve/deny** a resolution authorizing the negotiation and execution of a professional services agreement with The Lion Strategy Group, LLC for a comprehensive assessment and evaluation of the City of Lake Dallas.

**ATTACHMENT(S):**

1. Proposal
2. Resolution

**CITY OF LAKE DALLAS, TEXAS**

**RESOLUTION NO. 11122020-\_\_**

**A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF LAKE DALLAS, TEXAS, AUTHORIZING A PROFESSIONAL SERVICES AGREEMENT WITH THE LION STRATEGY GROUP, LLC, FOR PERFORMANCE OF A CITY ORGANIZATIONAL ASSESSMENT AND EVALUATION; AND PROVIDING AN EFFECTIVE DATE.**

**WHEREAS**, the City Council has requested that an assessment and evaluation of the City organization be conducted by The Lion Strategy Group, LLC and finds it to be in the public interest to negotiate and execute an agreement to procure such professional services.

**NOW, THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF LAKE DALLAS, TEXAS, THAT:**

**SECTION 1.** The City Manager is authorized to sign on behalf of the City a professional services agreement with The Lion Strategy Group, LLC for conduct of an organizational assessment and evaluation of the City organization for a fee not to exceed \$30,000.00.

**SECTION 2.** This Resolution shall be effective immediately upon approval.

**PASSED AND APPROVED** this the 12<sup>TH</sup> day of November 2020.

\_\_\_\_\_  
**Michael Barnhart, Mayor**

**ATTEST:**

\_\_\_\_\_  
**Codi Delcambre, TRMC, City Secretary**

**APPROVED AS TO FORM:**

\_\_\_\_\_  
**Kevin B. Laughlin, City Attorney**

(kbl:11/5/2020:118986)



# COMPREHENSIVE ASSESSEMENT AND EVALUATION OF THE CITY OF LAKE DALLAS

Michael Wilson

THE LION STRATEGY GROUP LLC 2500 Lotus Ave., Ft. Worth, TX 76111



# A Proposal to the City of Lake Dallas

In response to:

## **A REQUEST FOR A COMPREHENSIVE ASSESSMENT AND EVALUATION OF THE CITY OF LAKE DALLAS**

**Submitted to:**

John Cabrales  
City of Lake Dallas  
212 Main Street  
Lake Dallas, TX 75065

**Submitted by:**

LION Strategy Group, LLC  
2500 Lotus Avenue  
Fort Worth, Texas 76111

**Point of Contact:**

Mike Alexander, COO  
512-784-6580 | [Mike.Akexander@lionstrategy.group](mailto:Mike.Akexander@lionstrategy.group)

# CONTENTS

|                                                                              |           |
|------------------------------------------------------------------------------|-----------|
| <b>Introduction</b>                                                          | <u>3</u>  |
| Abasement Phase: Assessment of the Lake Dallas Policies and Culture          | <u>4</u>  |
| Task 1.1: Conduct a system-wide survey using various survey instruments      | <u>4</u>  |
| Task 1.2: Conduct Diagnostic Meetings with Internal Stakeholders             | <u>4</u>  |
| Task 1.3: Assess Existing Ethical Codes and Policies                         | <u>4</u>  |
| Raid Phase: Conduct diagnostic meetings with external Stakeholders           | <u>5</u>  |
| Reconstruction Phase: Expected Deliverables and Ongoing Assessment Practices | <u>5</u>  |
| <b>Vendor Qualifications</b>                                                 | <u>8</u>  |
| <b>Project Timeframe and Pricing Matrix</b>                                  | <u>11</u> |
| <b>Acceptance Page</b>                                                       | <u>12</u> |



## Introduction

Organizations today must contend with an environment of constant and accelerating change. Outstanding performance in such an environment demands healthy and effective leaders at every level within the organization and the ability to recognize red flags within the organization and community to effectively manage them in a manner congruent with community and societal expectations.

The methodologies utilized by the Lion Strategy Group consists of a review of the City of Lake Dallas' mission, vision, and values, a series of diagnostic meetings with internal and external stakeholders, and a system wide survey covering the following areas:

- Team Cohesion and Effectiveness
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- Team Development
  - Group Development and Engagement
    - Building Resilient Teams
    - Communicating Through Conflict
  - Interpersonal Communication
  - Implementation of a Mental Model of Resilient Leadership

We look forward to serving you!

Respectfully,

The LION Strategy Team

## Abasement Phase: Comprehensive Evaluation and Assessment of the City of Lake Dallas

Consultants will assess the existing policies, codes, and behavior using the LION strategy proprietary code of conduct assessment tools to determine potential areas of improvement and effectiveness.

The Ethical Climate Survey is designed to assist the development of processes that “(1) alert employees to some of the more sensitive and often problematic matters involved in employee conduct and ethics; (2) specify, where possible, actions and inactions that are contrary to and that conflict with the duties and responsibilities of municipal government employees, and (3) guide employees in conducting themselves and their affairs in a manner that reflects standards of demeanor and professionalism as required of municipal government employees.”

At the conclusion of the diagnostic phase, we will prepare a report of findings, review the findings with the City of Lake Dallas leadership, and recommend specific content and training for the remaining phases of the development of the comprehensive program assessment and evaluation.

### Objectives:

- Determine current perceptions of quality of life in the City of Lake Dallas.
- Assess the adequacy of existing policies, programs, communication, and training.
- Recommend changes likely to improve the quality of life in the City of Lake Dallas.

### Tasks:

#### **Task 1.1: Conduct a system-wide survey using various survey instruments**

The Ethical Climate Assessment Survey focuses on:

- Individual character of unit members,
- Policies and practices within the organization,
- Actions of unit leaders, and
- A variety of environmental and mission factors.

We will customize and adapt these surveys to collect information relating to employee awareness of the City of Lake Dallas’ policies, standards and environmental factors, their use of organizational resources to assist them in decision making, and indications of misconduct. The survey designed for the City of Lake Dallas will identify perceived levels of harassment, bullying, abuse of power and positive and negative hot spots.

### **Task 1.2: Diagnostic Meetings with Internal Stakeholders**

Our team will interview City of Lake Dallas leadership, selected organizational members, and auxiliary support members to obtain detailed information about the existing culture, development and management of the existing programs and processes, including the applicability of the City's Code of Ethics, perceived ethics-related problems, and how each support or hinder the stated goals of the city.

### **Task 1.3: Assess Existing Culture, Ethical Codes, and Policies**

Consultant will review existing climate within the organization and provide a preliminary recommendation(s) to the City of Lake Dallas Executive Leadership Team on the strengths and weaknesses of its current programs and processes and their impact in achieving the desired climate within the organization.

## **Raid Phase: Diagnostic Meetings with External Stakeholders**

Consultant will communicate and agree to meet with the City's Leadership team to create a plan that will comply with the City of Lake Dallas' Mission and Vision as well as meet the needs of the individual city departments.

**In Phase II**, we will work with City of Lake Dallas' external Stakeholders comprised of representatives of neighborhoods, businesses, churches, community agencies, youth groups, and local government. The purpose is to develop, oversee, and assist with implementing effective strategies to improve or enhance quality of life challenges, change perceptions, facilitate positive engagement, and increase trust between City of Lake Dallas Municipal Departments and the neighborhoods they serve by implementing community-problem solving relationship groups to provide venues for the community to have the ability to speak, be heard, and have their perspective considered.

We will take care to assure that the practices are grounded in the scientific findings of social psychology, decision-making theory, and the science of ethical principles in which LION Strategy has notable expertise.

## **Reconstruction Phase: Expected Deliverables and Ongoing Support**

### **Collaborative Leadership Training:**

Our collaborative Resilience Series is based on the findings of behavioral and leadership science that promotes true ethical leadership at every level within the organization. It is also designed to assist leaders and peers to spot and mitigate dysfunctional behavior within themselves and their co-workers. It is grounded in the insight that a cohesive group, loyal to the mission and ethical responsibilities of the organization, arises through a communication process that empowers all members of the group to

contribute to decisions that enable the group (whether a 2-person team or a division) to accomplish its mission.

Resilience is a dynamic process theorized to protect against or counteract the adverse effects of risk exposure within the organizational context. LSG realizes that resilience is characterized by patterns of selective emotional processing and cognitive control capabilities. Our unique Mental Model of Resilience will carefully and meticulously identify and then enhance the positive capabilities of people in your organizations that allow them to adapt effectively and safely under varying circumstances. Developing empathy and working alongside teams that you are trying to influence is essential. It is extremely important to continually work to build correct “mental models” of a system.

### **LION Strategy Resilience Series**

1. Mental Model of Resilience (1-Day)
2. Building Resilient Teams (2-Days)
3. Communicating through Conflict (2-Days)

*Based on assessment outcomes additional training services may be recommended*

### **Executive Mental Model of Resilience:**

Leadership today requires the ability to see patterns in behavior, complex systems, and morally ambiguous challenges. This process will teach leaders how to lead their team so that employees will view their work as a calling rather than merely a job, a place to belong rather than a place to work. It shows leaders how to infuse work with meaning and how to engage, energize, and ignite their workforce and gives employees a better understanding of what makes for a quality work experience.

We can no longer survive by functioning as separate individuals or independent organizations. As leaders work to build strength and fortitude in their staff, the leader needs to be aware of their own history, predispositions, strengths, and shortcomings. The art of leadership requires a connective imagination, an informed conscience, practiced competence and trust.

In the process of helping their employees develop resiliency, this leadership model provides a very accurate description of different leadership styles that help identify difficulties, encourage flexibility and the capacity to adapt to change. The leaders are called upon to provide multiple functions in circumstances of trauma and traumatization. Leadership is key to identifying that the system is suffering, naming the suffering and recognizing that the organization is a traumatized system with potentially traumatized people.

### **Two-Day Building Resilient Team Training:**

This two-day training event will be designed for the Senior Leadership Team Members with the City of Lake Dallas. To really understand this process, remember that people bring certain skills, behaviors, attitudes, and values to an organization. These attributes are the inputs to the socialization process. The outputs of the socialization process, or the socialization goals, include things like individual commitment, internalization of new organizational values, and innovative input to the group. Ultimately, the end

product of socialization may be viewed as a psychological contract between the new member and the group. For this contract to be fulfilled, some individual adjustment is usually required. This adjustment, or transformation, is the mindset of the socialization process.

### Two-Day Executive Team – Communicating through Conflict Training:

A crucial conversation is a discussion between two or more people where: The stakes are high; Opinions differ; Emotions run strong. The outcome significantly impacts their lives and there is significant risk of negative consequences. There are many different forms of crucial conversations, for example, you may need to deal with low performing or a borderline insubordinate follower, an unethical employee, or you may need to speak up when you “perceive” an employee is being unsafe. Informed, enlightened leaders do not necessarily seek to eliminate conflict or crucial conversations, but rather to manage them as a way to diagnose and repair systemic weaknesses as well as build stronger cohesive relationships. Through this process, leaders can facilitate an environment of teamwork that significantly enhances effectiveness and efficiency for everyone both in and outside of the organization

### Work with you in Creating a Speak Up Culture:

We know from social psychology and experience that we tend *not* to voice our concerns and misgivings when we are part of a group in which no one else is saying anything. But our organizational decision making suffers when we censor our critical or dissenting thoughts. Airplanes have crashed because a co-pilot kept his mouth shut, assuming falsely that the pilot was aware of a critical problem in the operation of a plane.

To counteract this natural inclination to keep quiet, we must create a speak-up and speak-out culture.

We recommend including training that shows employees how to speak up and out respectfully, how to listen to the concerns of others, and how to resolve disagreements. We also recommend establishing policies and performance management techniques designed to encourage giving voice to values, to reward those who speak up and out, and to hold people accountable for failing to say something when they should.

Further, we will work with the leadership team in order to create a culture where all employees have permission to voice concerns in a respectful manner. History has shown that whenever something goes wrong in organizations, someone in that organization knew that problems existed and if acted upon in a timely manner, those problems could have been avoided. However, those organizations did not have a culture that allowed employees to voice concerns. The responsibility for creating this type of culture lies with the executives of the organizations.

Human needs cannot be legislated away, dismissed with a new procedure, or overcome with an ingenuous gesture. But most traditional managers and/or leaders refuse to face the fact about the needs for love, dignity, and respect.

Most traditional managers and/or leaders also refuse to recognize that human needs drive human behavior. When certain basic human needs aren't being met, behavior turns sour and becomes disruptive. And such behavior affects work performance and morale. Maybe not today but definitely sometime in the future. Therefore, creating a **Speak Up Culture** is imperative.

### Life and Leadership Coaching:

This is a process in which a Lion Strategy Group Certified Coach will work one on one with members of the executive team over a period of time agreed upon by Lion and Lake Dallas decision makers. LSG coaches are experts on human behavior and organizational dynamics. One of our coaches will Partner with your executives in a thought-provoking and creative process that inspires them to maximize their personal and professional potential, which is particularly important in today's uncertain and complex environment. Our coaches honor your executive as the expert in his or her life and work and believe every employee is creative and resourceful. The executive will guide this process, not LION Strategy Group. The coaching process is about discovering and acting on insights toward the goals of the executive and the organization. This process involves the coach challenging the executive and helping hold them accountable for progress.

## Conclusion

Consultant will provide any materials in a format compatible with City of Lake Dallas software to accommodate the city's needs ( i.e., online, live, or a combination of training).

Consultant agrees to make changes to the implementation plan and materials related to the City's programs and processes at the request of the City and all the work resulting from this Consultant is subject to City of Lake Dallas approval.

LION Strategy Group has a wealth of experience with developing a variety of broad programs. Our comprehensive training curriculum is comprised of a hybrid of online and onsite training (if necessary), including recorded videos, discussion forums, quizzes, and other state-of-the art resources that reinforce and solidify the learning in ways that contribute to group cohesion and vigorous adherence to the principles and precepts of the comprehensive ethics program.

## Vendor Qualifications

LION Strategy Group represent decades of experience and expertise in police administration, the design of organizational ethics systems, and training and development work. Collectively they have

- More the 40 years of experience in consulting
- Proven experience developing and delivering Comprehensive Assessment and Evaluation Program as well as Training Programs.
- Professional and experienced consultants
- Proven track record in diverse industries
- National and International training services
- Established client and consultant partnerships
- Experience with customizing training for organizations and individuals
- Ability to assess critical factors and develop recommendations
- Listening to client requests and feedback
- Linking deliverables with personal and organizational goals
- Focus on productivity and results through a business perspective
- Excellent follow-up until project completion
- Excellent customer service and proven ability to exceed customer expectations

**LION Strategy Group CEO Michael Wilson** is a proven leader, known for initiating and delivering sustained results and effective, fundamental change. He quickly rose through the ranks of the Keller Police Department, recently retiring as Chief of Police after 20 years of service with the agency. During that time, his measurable accomplishments and penchant for cross-organizational teamwork covered the spectrum of functions: enterprise software; financial processes; design, development, and construction of government facilities; threat identification and mitigation; campus security; governmental mergers and inter-local negotiations; and public information. An expert in strategy, process, and effectiveness, he now utilizes the skills and knowledge carefully honed during his law enforcement career to serve as a high-level consultant across industries.

During his tenure in Keller, Mike's management and enterprise led to unprecedented progress, collaboration, and initiative. He was recognized as a trailblazer in community policing, from implementation of technology and taking data-driven approaches to reducing crime, to advancing the department's relationships with public and private partners. His tenure saw the national re-accreditation of KPD at the highest standard; the rollout of the SirenGPS emergency dispatching and mass notification system; and a full department restructure, body camera implementation, and the first national accreditation awarded to a regional 911 communications center in the State of Texas. The city

was continuously ranked one of the safest communities in Texas and the nation, and, in 2016, achieved its best crime stats in more than 25 years.

Mike's business acumen served the area well. Collaborations with non-profits, surrounding cities, and the school district led to the generation of more than \$3.5 million in revenue, minimizing the financial impact on taxpayers; those efforts continue to save the collective more than \$1.2 million annually. He served as project manager for the \$8.6 million expansion of a regional jail and animal services facility. Through effective analysis and projection, he decreased the KPD operating budget by 3% over a three-year period. He oversaw the design and implementation of software solutions and workflows to facilitate communications between regional agencies.

Mike Wilson holds bachelor's and master's degrees in business administration, with a concentration in finance, which he earned during his career in law enforcement. He has also done extensive graduate-level study in communications and organizational leadership. Certifications and affiliations include the Texas Police Chiefs Association Training Advisory Board; Texas Commission on Law Enforcement licenses as Instructor and Master Peace Officer; and State of Texas Private Investigations license.

**LION Strategy Group COO Mike Alexander** is a nationally recognized expert in training and leadership coaching, a specialty that began and flourished during his 38-year career in law enforcement and has defined the years following his retirement from service. Through the U.S. Department of Justice Community Policing Divisions, the thirty six (36) Regional Community Policing Institute, the Multi-jurisdictional Counterdrug Task Force Training Center, the Federal Law Enforcement Training Center, the Texas Municipal League, the International Law Enforcement Administration, and the Texas Police Chiefs Association, he has traveled the nation training officers and community members on ethics and integrity. In 1999, he founded the LION Leadership Institute, with workshops focused on management, healthy work environments, employee wellness, emotional intelligence, and socialization. Now as co-founder of the Lion Strategy Group, Mike applies the substantive learnings and techniques of his life and multifaceted career to help others thrive.

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### Project Timeline and Pricing Matrix

| Item/Task                                                                                                                                              | TIME FRAME                                               | Cost            |
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| <b>Reconstruction Phase - Expected Deliverables and Ongoing Assessment Practices</b><br><br><b>Life/Leadership Coaching for executive team members</b> | TBD<br>1 week on-site<br>Coaching on going after on-site | \$10,000        |
| <b>TOTAL PROJECT COST</b>                                                                                                                              |                                                          | <b>\$30,000</b> |

Please confirm your agreement with the foregoing by signing and returning to the undersigned the duplicate copy of this letter agreement enclosed herewith.

The Lion Strategy Group LLC

Michael Wilson

Chief Executive Officer

*Michael Wilson*

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Signature

November 4, 2020

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Date

**ACCEPTED AND AGREED AS OF THE DATE FIRST WRITTEN ABOVE**

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Mr. John Cabrales, City Manager

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Date