



January 13, 2025

Mayor Ed Lauing, Chair  
Council Appointed Officers Committee  
City of Palo Alto  
250 Hamilton Ave  
Palo Alto, CA 94301

Dear Vice Mayor Lauing,

Thank you for reaching out to Municipal Resource Group, LLC ("MRG") to assist the City of Palo Alto ("City"). MRG is pleased to submit a proposal to facilitate the Council Appointed Officers (CAO) Annual Performance Evaluation and develop performance goals for the Appointed Officials for use in the 2025 evaluation process. One of the important tasks of elected officials is the annual review of the appointed officials, focusing on developing a formal, mutually agreeable, and value-driven process. The results of these evaluations are crucial to organizational success and achieving the Council's vision and goals.

As you know, MRG has extensive experience with Council-appointed position evaluation processes. When conducting an evaluation, we seek to communicate the desires and expectations of the elected body in one voice. This requires we spend sufficient time understanding each member's perspective of the appointed official's performance to prepare an evaluation summary that concisely documents areas of consensus and divergent opinions. The result is an evaluation that permits the Council and the appointee to know what is going well, areas for further development, and a road map to achieve the desired performance objectives. Our familiarity with City Appointed Officials and Councils will allow a deep dive into each year's focus areas.

MRG regularly conducts chief-appointed official evaluations for cities, counties, special districts, and school districts. We have recently facilitated the evaluation process for many of your neighboring agencies, such as Redwood City, Pittsburg, Sunnyvale, Los Altos, San Leandro, Portola Valley, Roseville, San Luis Obispo, Santa Cruz, Santa Rosa, and the Fresno Unified School District. We will apply lessons learned to the Palo Alto process to ensure it is exceptional.

Respectfully submitted,

Mary Egan, CEO  
MRG, LLC  
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## ABOUT MRG

The MRG team is a centralized resource for Council Appointed Officers Evaluations and Facilitations, Human Resources, Staff Development, and Organizational Excellence needs. We can assess and improve HR functions including, but not limited to, professional development, training, succession planning, workplace investigations, organizational assessments and implementation plans, employee relations, mentoring and coaching, project management, recruitment, and selection. MRG team members have led successful transformational efforts in our client agencies and fully understand their real-world challenges in making meaningful, long-term changes.

Firm Name:	Municipal Resource Group, LLC ("MRG")
Physical Address:	8788 Elk Grove Blvd., Suite L, Elk Grove, CA 95624
Mailing Address	PO Box 561, Wilton, CA 95693
Website:	<a href="http://www.Solutions-MRG.com">www.Solutions-MRG.com</a>
Facilitator:	Dan Rich
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Telephone Number:	(650) 387-2074

### MRG's Consulting Philosophy

*As a consulting firm, MRG brings talented consultants to assignments to meet clients' needs. MRG differentiates its work based on the following principles.*

#### **Trusted Advisors**

MRG prides itself on building long-term relationships with clients who turn to it for guidance and expertise. We work as "trusted advisors," working directly with organizational leadership to help them manage their complex organizations and adjust to change that constantly knocks on the door.

#### **Commitment to Public Service**

We have also chosen to focus our work on local, regional, and state agencies that deliver public service to communities. We understand that our clients' work is important and impactful, and our goal is to help organizations do that work with more grace, effectiveness, and efficiency.



#### **Partnership for Impact**

As seasoned executive leaders ourselves, we have no interest in writing reports that sit on shelves or are not reality-based for action. MRG needs to work in a consultative partnership directly with management for organizational impact to occur. We see our role as true partners

with the leadership team to work productively to help you find solutions for actionable impact in your organization.

### ***Team of Management Practitioners + Executive Leadership Coach***

Today's organizations require a robust understanding of people and teams, plus talented management and leadership. The key to an organization's success is the integration of control, which creates value (efficiency, effectiveness, empowerment), and leadership, which inspires change and a collective vision. By bringing a consultant team with management plus leadership coaching expertise, MRG can deliver tools, perspectives, and paradigms for the continued growth and support of an organization's leadership team.

### ***Strategic Organizational Development***

Organizations are complex, multifaceted organisms that take time and strategy to develop and shape. While employees are focused on delivering services, the "care and feeding" of the organization, structure, and systems needs to be done to support the workforce, mold culture, and deliver services/mission. MRG brings deep organizational development and human resources experience to transform and help organizations continue to invest in their operations' strategic and hands-on development.

## **SCOPE OF WORK FOR PALO ALTO**

MRG has an established approach to Performance Evaluation Processes. Based on standard practice, we then incorporate Palo Alto's request to include additional elements or minimize the process to meet expedited timelines and needs. Flexibility is critical to providing Palo Alto with a mutually agreed-upon process.

A successful performance evaluation will recognize the accomplishments of the CAOs to show appreciation for their contributions to the City. The summary will identify areas where the CAOs are successful and areas for professional development. MRG will facilitate discussions between the Council and the CAOs with actionable items to enhance organizational leadership. Finally, our process allows the CAOs to provide a self-assessment to summarize their accomplishments and specify progress on established goals from their perspectives.

## **EVALUATION METHODOLOGY**

- An introduction to our evaluation process includes a virtual Closed Session with the Mayor and Council to review the process, discuss options, highlight key dates, and communicate the expectations of the Council, CAOs, and MRG facilitator. During the introductory meeting, we address logistics related to the process.
- Secure a comprehensive self-evaluation document from the CAO. MRG has an outline that provides a framework for preparing a self-assessment.
- Customize the evaluation process to reflect the needs of the City Council. We work with the City Council to gain insight concerning high-level performance expectations and to customize the process, including finalizing the online survey, performance areas, and attributes.
- *Optional: If requested, prepare, and collect salary data for the CAO from approximately*

*six comparable jurisdictions. MRG will also engage in individual discussions with the Appointed Officials to uncover compensation interests. Subsequently, in memorandum format, MRG will relay this information to the Council and assist in facilitating agreement on any compensation adjustments.*

- *Optional: If requested, prepare a Direct Reports feedback report for the CAO that will solicit input from each member of the Senior Staff via an online survey tool, seeking information on the CAO's performance and obtaining insight on strengths and potential development opportunities.*
- Gather insight and input, including goals, from each Council member. Interview each Council Member individually in a manner that offers flexibility in scheduling. Video conferencing provides an efficient, low-cost platform. MRG will interview the two outgoing Council Members.
- Council Members will make themselves available for an interview by the end of the second week in August.
- MRG will develop the comprehensive draft summary, including the perspectives of all members, integrated into common “themes” and goals that give consistent feedback and speak with one voice where possible. MRG will also prepare a compensation memo for the Council to consider compensation adjustments if requested.
- Review and reach a consensus on the draft evaluation report and goals in a closed session with the City Council. In some cases, the City prefers to include the CAOs in these conversations to hear the council's deliberations. Other agencies prefer to have this deliberation with the facilitator and include the appointed official after the draft document has been finalized. This is one of the topics we will discuss at the pre-meeting.
- Finalize and deliver evaluation summary and address process issues, as necessary. Meet with the CAOs to assist them in developing an action plan to meet the Council-identified expectations.
- Debrief with the City Council and the CAOs as appropriate to identify the process's strengths and concerns. Identify methods for ongoing communication and make suggestions on a process for mid-year performance discussions with the appointed officials, as necessary.

The evaluation process typically takes 8-10 weeks to complete. This timeline is subject to the availability of the City Council for closed sessions, individual interviews, and the relevant documents by the City.

## MRG TEAM

**Dan Rich** (Lead Consultant) Dan Rich is a local government leader with more than thirty years of public sector experience, including fourteen years as a city manager. He is a big-picture strategic thinker and someone who pays attention to the small details and the political context of a situation. Dan's proven interpersonal, communication, negotiation, and facilitation skills have served him well in developing highly effective teams over the course of his career and he has been involved with career development efforts of younger professionals for almost two decades. He has a strong background in organizational development, strategic planning, and land use as well as extensive involvement in financial management, personnel, and policy analysis.



### Prior Local Government Experience:

- City Manager, City of Mountain View
- City Manager, City of Campbell
- Assistant City Manager, City of Belmont

### Consulting Services Provided:

- City of Palo Alto, Performance Evaluations (CM, CA, City Clerk)
- City of Novato, Administrative Services Department, Executive Coaching

### Coaching / Leadership:

- City of Alameda, Executive Coaching
- City of Palo Alto, Executive Coaching

### Training & Certifications:

- B.A., UC Berkeley
- MPP, Harvard University's John F. Kennedy School of Government

**Julie Mares** (Vice President of Operations, Principal) – Julie provides advice and coaching in the areas of human resources and organizational effectiveness. She is a seasoned career public sector manager with more than two decades of broad executive experience. Julie has experience working within a general-purpose local government, with special emphasis on human resources, strategic planning, City Council relations, leadership development, financial sustainability, and community engagement. Julie served as City Manager for the City of Milpitas, where she led a staff of 400 employees to serve a diverse population of 80,000. In her final position as San José Deputy City Manager, Julie was the Interim Human Resources Director. Julie is readily available to oversee the project team and meet project deadlines.



**Mary Egan** (Chief Executive Officer)—Mary is the MRG Chief Executive Officer. She collaborates with public and private organizations and their executive leadership to achieve their full potential. She has conducted hundreds of appointed official evaluations for public agencies.

She is a certified professional executive coach who uses these skills to help clients increase their performance and identify potential limiting blind spots.



She also advises clients regarding employment-related risk mitigation, strategic planning, and interest-based problem resolution.

The entire team of MRG-affiliated consultants can be found at [www.Solutions-MRG.com](http://www.Solutions-MRG.com).

Should the need arise for subject matter expertise, we have a wide range of professional subject matter experts in addition to Human Resources experts.

#### **COST:**

We will complete the work we identify for a fixed fee of \$12,000 per appointee evaluation and related goal-setting for in-person attendance at a closed session. MRG will invoice 50% of the contract at the project launch and the remaining 50% after the evaluation.

Costs per evaluation element:

City Manager Evaluation	\$12,000
City Attorney Evaluation	\$12,000
City Clerk Evaluation	\$12,000
City Auditor Evaluation	\$12,000
Direct Reports Feedback per Appointee	\$3,500 (if requested)
Executive Salary Analysis per Appointee	\$2,500 (if requested)

Additional work not contemplated in this proposal will be billed at \$325 per hour and will begin only after agreed upon between the City and MRG.





## Dan Rich

### ***Affiliated Consultant***

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Dan Rich is a local government leader with more than thirty years of public sector experience, including fourteen years as a city manager. He is a big picture strategic thinker and someone who pays attention to the small details and the political context of a situation.

Dan's proven interpersonal, communication, negotiation and facilitation skills have served him well in developing highly effective teams over the course of his career and he has been involved with career development efforts of younger professionals for almost two decades. He is passionate about helping grow talent in the public sector.

**Rich's Areas of Expertise:**  
*Organizational Development*  
*Coaching*  
*Governance*

He has a strong background in organizational development, strategic planning, and land use as well as extensive involvement in financial management, personnel, and policy analysis. Dan provided strategic direction for developing and gaining stakeholder support for three successful revenue measures.

Dan served as Mountain View's City Manager from 2011 through 2019, when he retired. Mountain View is a full-service city with approximately 80,000 residents and 600 employees. It is home to numerous well-known companies including Google, Intuit, and LinkedIn, as well as numerous startups. Dan worked on complex land use projects and partnerships as well as award-winning long-range planning documents. He was a leader on regional pension reform, transportation, and Next Gen employee development initiatives. Dan also took pride in fostering effective Council relations and initiating employee wellness and engagement efforts. He served as chair of the Santa Clara County City Managers Association and was a member of the League of California Cities' pension reform task force.

Prior to Mountain View, Dan spent six years as the City of Campbell's City Manager, four years as Assistant City Manager in Belmont, and nine years in the Sunnyvale City Manager's office. He also spent five years working for members of Congress.

Since retiring, in addition to consulting, Dan has been working part time at Stanford, teaching a public policy practicum, an introductory Land Use class and a Local Government class. He also volunteers with local non-profits.

Dan is a Bay Area native and received his BA from U.C. Berkeley in Economics and Political Science and has a Master in Public Policy from Harvard's John F. Kennedy School of Government.



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## Julie Mares, Vice President of Operations

### ***Affiliated Consultant***

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Julie Mares is a seasoned, public-sector manager with more than two decades of broad executive experience in the areas of general management, organizational development, financial sustainability, parks & recreation, community services, affordable housing, performance measurement, and human resources. Julie has extensive experience working within local government, with special emphasis on strategic planning, city council relations, leadership development, and community engagement. Julie is a strategic thinker, capable of helping organizations adapt to fiscal and service challenges while focusing on interdepartmental coordination and community partnerships to enhance efficiency and effectiveness.

Before affiliating with MRG, Julie was the Chief Operating Officer for Management Partners where, in collaboration with the executive team, she directed all aspects of operational policies, objectives, and initiatives that enabled the consulting agency to be well-positioned to provide value-added services to all local government clients. She also served as the City Manager of Milpitas, where she led a staff of 400 to serve a diverse population. Key initiatives completed during her tenure included a successful ballot measure to increase the Transient Occupancy Tax, a collaborative update of community development fees supported by the development community, an interagency partnership to site the City's first 100% affordable housing project, and numerous administrative process improvements.

#### **Julie's Areas of Expertise:**

*Strategic Planning*

*Governance*

*Management Consulting*

Additionally, Mares worked for nearly eleven years with the City of San José, the nation's tenth largest city. As the Deputy City Manager, she focused both on strategic partnerships with schools and businesses and on civic engagement and collaboration with community stakeholders to provide safe and healthy neighborhoods. One example included spearheading a partnership with the local high school district to deploy a free Wi-Fi network for underserved students. She also served as Director of Parks & Recreation. In that role, she led the development of a new program creating a financially sustainable approach to operational delivery of parks and recreation that resulted in the adoption of a City Council policy, a new regional training program, and a twenty percent improvement in the departmental cost recovery rate.

Julie worked for the City of Tucson for nearly 12 years as Deputy Director of Budget and Research, Assistant to the City Manager, and Human Resources Administrator. As the Deputy Director leading the Research and Organizational Effectiveness Division, she collaborated with internal clients, providing a variety of management consulting services to strengthen and enhance organizational performance and effectiveness. She also served as a manager with United Airlines for eleven years in several leadership roles for airport operations and customer service management.

Mares holds a BS in business management and a master's in education. She is a graduate of the Southwest Leadership Program in Public Policy Management from the University of Arizona Eller College.



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## Mary Egan – Chief Executive Officer

### ***Affiliated Consultant***

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Mary is the CEO and a founding partner of MRG, overseeing the entire practice and providing high-level leadership over every project. She is highly skilled at Executive Coaching, Workplace Investigation, and Conflict Resolution and often uses those skills, along with her considerable experience, when advising her clients regarding employment-related risk mitigation, strategic planning, and interest-based problem resolution. Mary's specialties are facilitating performance evaluations and organizational analysis as well as coaching employers to address deficiencies and maximize their impact. She is a certified professional executive coach and uses these skills to help clients increase their level of performance and identify potential limiting blind spots. She also advises clients regarding investigations, employment-related risk mitigation, strategic planning, and interest-based problem resolution.

Mary is adept at the facilitation of staff retreats, team-based problem-solving, and labor management committees, works with elected boards to define the performance expectations of their key managers, and serves as a neutral factfinder in the resolution of employer/employee issues.

#### **Mary's Areas of Expertise:**

*Conflict Resolution*

*Executive Coaching*

*Performance Evaluations*

*Strategic Planning*

As a Private Investigator and Qualified Manager licensed by the State of California, Mary has handled hundreds of workplace investigations for both private sector and public employers on all types of employment matters over the last several years, including claims of discrimination, harassment, retaliation, whistleblowing, substance abuse, threats of violence, assault, theft, fraud, violations of company policies, wage and hour violations, and other forms of alleged misconduct. Mary is experienced in testifying during administrative and judicial proceedings regarding completed investigations and provides expert testimony on the adequacy of workplace investigations, human resource practices, and public sector employment standards and expectations. She is also qualified as an expert in State Court on the adequacy of investigations. She is a founding member of the Association of Workplace Investigators ("AWI") and spent four years developing the AWI's published standards for workplace investigations and serving as a faculty member at the Workplace Investigation Institute.

Prior to MRG, Mary held key positions with both the City of Sacramento and the City of San Jose, where she was the Employee Relations Officer and Chief Negotiator. While with Shannon Associates, Mary managed recruitments for high-level appointed executives, as well as complex HR assessments for large and complex clients. She continued her consulting services with high-profile clients after starting her own firm in 2001 and maintains long-term relationships with cities and counties in California. Mary is a recognized expert in municipal government interest arbitration.



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In addition to her significant field experience with major clients, Mary earned a Bachelor of Science degree in Applied Behavioral Sciences from the University of California, Davis, where she was named “Outstanding Female Graduate,” and a Master of Public Administration (MPA) degree from San Francisco State University. Mary is a founding member of the California Association of Workplace Investigators (CAOWI), participating as Chairperson of the Legislation Committee and member of the Best Practices Committee.

Mary is a Certified Professional with the Society for Human Resources Management (SHRM) and is a founding member of the Association of Workplace Investigators (AWI). She is a frequent presenter at conferences, seminars, and meetings of several professional organizations, including the League of California Cities, the International Public Management Association (IPMA), the California Public Employers Labor Relations Association (CALPELRA), the Municipal Management Assistants of Northern California (MMANC), and the California State Association of Counties (CSAC). In 2018, Mary was recognized by the Sacramento Business Journal as a recipient of the Women Who Mean Business award.



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