



March 3, 2014

Larysa Blyzniuk  
Collaborative Director  
SE Michigan Senior Regional Collaborative  
Detroit, MI 48202

Dear Ms. Blyzniuk,

Thank you for the opportunity to provide strategic planning facilitation with the SE Michigan Senior Regional Collaborative (SRC). This letter provides an understanding of your current situation and a planned approach.

SRC is a regional collaborative of more than 25 organizations focused on the needs of the aging population. Established in 2008, SRC is desirous of developing a strategic plan to guide efforts it's over the next three years.

#### Strategic Planning

Strategic planning is a process designed to provide a framework for formal decision-making in order to accomplish the following:

- Understand your potential,
- Better serve your constituents,
- Enrich your vision,
- Align your efforts,
- Inspire staff and Board, and
- Create a realistic plan for the future.

#### Strategic Planning Team

In order to best maximize the success of this endeavor, a strategic planning team is created. Typically, the strategic planning team represents members of the Board and leadership team. Selection of strategic planning team members is critical and can make the difference between a vibrant, dynamic plan versus one that has little likelihood of success. The ideal size of the team is 8-12.

### Data and Stakeholder Input

Prior to the launch of the strategic planning meetings, key data is collected and assembled. This information includes such things as financials, sources of revenue, fund development results, quality metrics, current service offerings and outcome data.

Separate SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis sessions are scheduled with the Board, partners and staff in order to ensure active participation and involvement. These highly interactive sessions are designed to get input from a variety of perspectives, while simultaneously building commitment for the ultimate recommendations. Focus groups and/or individual interviews are also scheduled with key stakeholders: e.g. families, volunteers, partners, and donors.

### Core Ideology and Envisioned Future

The purpose, vision, and mission of SRC are reviewed and revised. Often, a fresh start is taken to identify the fundamental reason the organization exists, its salient beliefs, and long-term vision.

### Generative Dialogue

Based on input from board and stakeholders, staff will identify the most important strategic issues for consideration. These topics will be “framed” by creating support documentation, thorough explanations, and generative questions. Based upon the RFP, potential areas of generative dialogue include organizational capacity and sustainability, impact and outcome measurement, and partnerships.

The strategic planning team reviews the issues developed by staff, and engages in robust dialogue in determining future direction. The outcome of this step is a clear direction for the organization in these significant areas.

The staff reconvenes to develop specific action plans. A draft strategic plan, with specific tasks, timelines, and individuals responsible for completion, is written.

The draft plan is reviewed by the strategic planning team. The plan is ultimately shared with the board for approval and adoption.

### Summary

An evaluation mechanism to monitor the action plans is established. Lastly, a communication plan is determined in order to share the plan with stakeholders.

BCG guides the entire planning process, conducts all internal and external stakeholders input, facilitates planning sessions, transcribes all written materials, prepares the final report document, and provides leadership support. The fee for this engagement, based on \$200 per hour, will not exceed \$15,000.

### Professional Qualifications

Dennis Blender, Ph.D. has over 30 years of psychological consulting experience in organizational development, strategic planning, and facilitation. Dennis has designed and facilitated over 70 strategic plans and board retreats within the nonprofit sector. He provides the appropriate balance between the needs of the organization, board/staff, clients, donors/funders and community.

Dennis launched his own firm, Blender Consulting Group, in 2002. Prior to that, he was a partner at Plante Moran. He has a Ph.D. from Wayne State University in Educational Psychology.

Thanks again for providing BCG the opportunity to submit a proposal to work with you on this very important project. We are extremely confident of attaining a positive outcome.

Sincerely,

Dennis Blender, Ph.D.



### Recent Engagements with Non-Profit Organizations

- Adult Well-Being Services
- Battle Creek YMCA
- Charitable Union
- Children's Hospital of Michigan Foundation
- Coalition to End Homelessness
- Common Ground
- Community Housing Network
- Covenant Community Care/SWS Alliance
- Downtown Youth Boxing Gym
- Easter Seals Michigan
- Family Services Alliance
- Gleaners
- Goodwill Industries of Central Michigan's Heartland
- Great Start Collaborative
- The Guidance Center
- Homeless Action Network of Detroit
- JARC
- Jewish Coalition Against Domestic Abuse
- Jewish Family Services
- JVS
- Leader Dogs
- Lighthouse of Oakland County
- Macomb Oakland Regional Center (MORC)
- MARO
- Michigan Association of Drug Court Professionals
- Michigan Recovery Council
- Michigan School of Professional Psychology
- Neighborhood Services Organization
- New Horizons Rehabilitation Services, Inc.
- NSF International
- Oakland County Community Mental Health Authority
- Oakland Family Services
- Pewabic Pottery
- Reading Works
- Southwest Counseling Solutions
- Southwest Housing Solutions
- Southwest Solutions
- Starfish Family Services



### References – Strategic Planning Engagements

Sheilah Clay, CEO  
Neighborhood Service Organization  
Engagement: 2012-2014, strategic planning  
313-961-4890  
spclay@nso-mi.org

Perry Ohren  
Jewish Family Services  
Engagement: 2002-2014, strategic planning  
248-592-2656  
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Gerald Provencal, CEO, Macomb Oakland Regional Center (MORC)  
Engagement: 2013-2014, strategic planning  
586-263-8700  
gerald.provencal@morcinc.org

Tony Rothschild, CEO, Common Ground  
Engagement: 2008-2014, strategic planning, Board retreats, leadership development  
248-456-8158  
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John Van Camp, CEO, Southwest Solutions  
Engagement: 2005-2013, strategic planning, Board retreats, leadership development  
313-841-8900  
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Kari Walker, CEO, The Guidance Center  
Engagement: 2003-2013, strategic planning, Board retreats, leadership development  
734-785-7700  
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