

STRATEGIC PLANNING SERVICES Proposal

Presented to:



By

**Colton Group Detroit LLC
March 7th, 2014**

Confidential

Strategic Planning Services Proposal Southeast Michigan Senior Regional Collaborative

I. Introduction

Colton Group Detroit is pleased to respond to the RFP from Southeast Michigan Senior Regional Collaborative for facilitation and development of a 3 year strategic plan.

II. Colton Group experience with nonprofit, public, and private sector organizations, and its approach to strategic planning with collaboratives.

Since 2004, Colton Group Detroit (Colton Group) has worked exclusively with nonprofits, foundations, and funders to help build capacity, sustainability, and growth to support the people they serve. Our experience tells us that while communication and participation in planning are key for all nonprofits, collaboratives require a heightened sensitivity in this regard. Given the inherent diversity of mission and need in a collaborative environment, Colton Group seeks to maximize participation and input from all members throughout the process to engender a sense of "Authorship and Ownership". This process solidifies the shared vision and mission of the collaborative team and supports the successful implementation of the plan it builds. We show this approach throughout this proposal in the descriptions of phases, activities, and deliverables.

Examples of strategic planning with collaboratives:

- **Michigan Benefits Access Initiative** – A collaborative of 27 organizations, including state agencies, funders, and nonprofits came together to build a strategic plan for a statewide initiative to deliver over \$1billion in unclaimed benefits to Michigan residents. We successfully created and launched the strategic plan. The network is currently operational with continuing funding.
- **Jefferson East Inc.** - Planning for a collaboration of 30 nonprofits, private organizations, funders, and neighborhood associations, represented by two organizations; East Jefferson Corridor Collaborative and Jefferson East Business Association, which were merged to provide a single voice for development and support to the Jefferson Corridor from Rivertown to Alter Road. Successful implementation and continued funding.
- **Michigan Association of United Ways** – Strategic planning for an organization with over 100 members statewide. Represented by an executive committee for draft plan responsibilities, and with input along the way from membership, this new strategy was successfully completed and is being implemented.
- **Basic Needs Collaborative** – Nonprofits representing 3 counties (Wayne, Macomb, and Oakland) came together to conceive, design, and implement a training and fund development strategy. This provided support to leverage volunteers, extending professional services to clients. Successful implementation and continuing funding.
- **Greater Detroit Centers for Working Families** – Provided strategic planning for a collaborative of funders and nonprofit organizations designing the first network for the Annie E. Casey model. Colton Group returned at 3 year stage for continuing planning, and Colton was subsequently tasked with launching centers in Kalamazoo, Grand Rapids, Battle Creek and Flint. Continuing success and funding.

III. Scope of Work

Colton Group proposes the following approach to delivering a strategic plan to guide the Southeast Michigan Senior Regional Collaborative through the next 3 years. The process will be structured in 4 phases over 3 to 4 months. Included will be:

1. Supporting preliminary activities “immersing” Colton Group in SRC history and practice, producing a draft outline for a facilitated stakeholder strategic planning retreat for SRC senior management review.
2. Facilitated planning sessions (participants to be determined by SRC senior management) to achieve agreement on and continued commitment to mission and vision, a SWOT inventory (strengths, weaknesses, opportunities, and threats), and the establishment of work groups, or subcommittees, around key areas identified and supported by SRC’s Strategic Planning Task Force (SPT).
3. Colton Group will then guide the work of subcommittees that will outline SRC’s efforts in program growth, market strategy, and fund development
4. Colton Group will produce the final strategic plan document that will serve as a “touchstone” for both operational decision making and fund development activities in the plan period

Timeline – The following is a draft timeline for phases, activities, and deliverables described in this proposal which are described in detail afterward. Colton Group remains flexible to amending/modifying to meet the needs of SRC management and stakeholders.

Strategic Business Planning Timeline DRAFT																	
Activities/Action Items:	Responsibility	Deliverables		Timeframe-Weeks													
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
PHASE I - Environmental Background Research and Report																	
Initial Colton/Senior Mgmt Session	Colton/Dir																
Colton Group Staff/Stakeholder Discussions	Colton/Staff		X	X	X												
Organization Research	Colton/Staff		X	X	X	X											
Colton Compiles Pre-work Report/Draft Retreat Agenda	Colton						X										
Colton Delivers Report/Agenda	Colton											X					
PHASE II - Strategic Planning Retreat																	
Strategic Planning Task Force (SPT) Retreat	Colton/SPT												X				
Subcommittees (SC) set (eg. Capacity, Funding, Advocacy, Sys.)	Colton/SPT											X					
Colton Produces Retreat notes	Colton												X				
Phase III - Committees Flesh out Strategic Action Plans																	
Subcommittees (SC) meet (1 of 2 Sessions)	Colton/SC												X				
Colton crafts committee sections from session direction	Colton													X			
Subcommittees meet review approve sections (2 of 2 Sessions)	Colton/SC													X			
Colton provides "real time" updates for Collab. review/input	Colton														X		
PHASE IV - Craft Strategic Plan																	
Colton compiles all committee work/crafts draft plan	Colton														X		
SPT/Full Collaborative meet for Review/input on draft plan	Colton/SPT/Coll.														X		
Colton makes changes to draft if needed	Colton															X	
Submit Final Strategic Plan for Approval	Colton/Board																X

IV. Activities and Deliverables by Phase

Phase One Activities - Background Research. Colton Group will review any pertinent organization and business documents, and conduct a series of meetings with management, staff and stakeholders as appropriate to more deeply understand SRC's history, current offerings, funding, business model, future aspirations, and to identify the key questions for the planning process-.

Phase I Deliverable: Colton Group will provide meeting notes and a draft agenda for an SPT retreat.

Phase Two Activities - Facilitated Strategic Planning sessions. It is recommended to begin with an extended retreat session (1/2 –full day session per availability) with full Strategic Planning Task Force (SPT) of stakeholders identified by SRC management to set direction for the plan. There will be structured, highly participatory exercises around Vision, Mission, and Guiding Principles (Values) to reinforce, and gain full buy-in alignment on strategic direction. At this session, we will also select the subcommittees that are appropriate for execution of the SRC Strategic Plan. These subcommittees could represent your current org structure (e.g. Data/Research Advocacy, Resource Development, Benefits Access, and Training), or your identified organizational objectives (e.g. Build organizational strategy, Advocacy and Awareness, Funding/Resources, and Shared/Strengthened Systems). We will be sure that committee work will advance the work on operations, capacity, fund/revenue development, legal, governance, and membership structure.

During this session, these subcommittees will draft a high level Strategic Action Plan outlining high level goals, timelines, and responsible parties, and will report out in the session to the full Strategic Planning Task Force for feedback and recommendations for their ongoing work. In this way, we assure the committees are advancing work agreed to by the full SPT.

Ongoing Value of the Strategic Action Plans: The SAP keeps the strategic plan a living/breathing document that can serve the organization throughout the plan period. This tool can and should be used in each Steering Committee and full collaborative session moving forward to monitor progress of the plan, or make adjustments based on realities on the ground. Diligence with the SAP will assure the strategic plan continues to progress, assuring that goals are monitored and that issues remain "On the radar screen" of the steering committee. It also allows for flexibility in your strategic plan if events on the ground require modification to your plan.

Phase Two Deliverables Colton Group will compile all retreat session notes including the draft Strategic Action Plans for distribution to the SPT

Phase Three Activities– Subcommittees add detail to Strategic Action Plans.

The subcommittees will each meet twice. Each subcommittee will produce a Strategic Action Plan; identifying goals, intermediate goals, responsibilities, activities, and timelines, which will be included in the final strategic plan document. The first subcommittee sessions will be for 90 minutes to give direction to the consultant, who will craft the report. Then there will be a second subcommittee session for 60min to review and approve the sub committee's product (we may be able to do this by phone).

Phase Three Deliverables Colton Group will compile all meeting session notes for distribution to the SPT and to the full collaborative as appropriate to keep them aware of the process in "Real Time" (per Colton Group approach described above).

Phase Four Activities – Craft Strategic Plan and Meet with full SPT and full Collaborative (if possible) for final approval. The full SPT will meet again for a second and final time for 90min to review the recommendations and approve the plan/make recommendations.

The activities in Phase Two will provide the details for crafting the strategic plan document. The strategic plan will serve as a narrative for SRC stakeholders that contains, at a minimum, the following:

- Executive Summary – Overview of operation, the needs served, activities, history, mandates, and stakeholders (contains the organization's Vision, Mission, and Guiding Principles)
- Overview of Strategic issues/goals/and objectives for organization and membership
- Specific product/service/division description and activities over course of plan period to support strategic plan and identification of organizational capacity to execute
- A S.W.O.T. analysis (include action narrative to address)
- Financial implications of the plan. (required fundraising/earned income, etc. to support the program strategy) Include SRC provided financials if required
- Attachments as appropriate

Phase Four Deliverables – Draft and final versions of the SRC 5 year strategic plan. The draft will be presented for approval to the SPT and any changes will be included in the final version presented to the full SRC board of directors targeted by the RFP for September 1, 2014, but we will likely conclude earlier if we start by April 1st.

V. Participating Consultant

Colton Group Principal Jim Pizzimenti would provide all services described in this proposal. Contact information and Bio follow:

Contact Information:

Jim Pizzimenti: [\(248\) 444-9465.](mailto:jpizzimenti@coltongroup.com)

James D. Pizzimenti Bio

Jim is co-founder and Principal of Colton Group Detroit. Since 2004, he has worked exclusively with foundations, funders, nonprofit agencies, collaboratives, and state wide initiatives to launch programs, plan and execute strategy and build capacity. Jim is a member of the Kellogg Action Lab College of Consultants.

In a career spanning over 30 years, Jim served in senior management roles for both domestic and international organizations of 70 to 500 people and \$10 million to \$600 million in annual revenue. His positions include: president of a training software company, vice president and corporate officer of a Ford Motor Company subsidiary, vice president and general manager in diversified services organizations, and Service Delivery Officer for a web based products company. Jim began his career as an educator in the federal Title I program in Detroit, Michigan.

Jim has also served in senior volunteer roles in the nonprofit sector for over 25 years including: Fund Distribution - United Way SEM, Board member - University of Michigan Dearborn M.S. program in Adult Instruction and Performance Technology, Trustee - American Red Cross SEM, founding board member - Greater Detroit Network for Social Innovators, and current board member – Corporation for a Skilled Workforce.

VI. Cost Proposal

Pricing

Hourly Pricing: The Colton Group hourly rate for nonprofit engagements is \$150/hr. It is estimated that this effort will require between 110 and 120 hours of effort over an estimated 16 weeks beginning in April and targeted for completion on or before September 1, 2014. This is for reference only as The Colton Group is prepared to offer a project price for the scope of services included in this document.

Project Price: The Colton Group is pleased to offer a complete project price, including expenses, to provide the deliverables described in this document for a fixed project price of \$15,000.

Expenses: All local travel is included in the project price. All Documents will be supplied in electronic format (MS Word, Excel, PowerPoint, PDF, etc.) and as such, should incur no expense from Colton. Any reproduction of documents will be the responsibility of SRC.

Fee and Budget - Breakdown of Hours: It is anticipated that the hourly effort for each phase is 25% for phase 1, 20% for phase 2, 30% for phase 3, and 25% for phase 4.

Payment Schedule: Payment for services will be due as follows: \$5,000 is due upon Phase I delivery of the draft agenda. \$5,000 will be due upon delivery of the retreat notes and the draft Strategic Action Plans, and \$5,000 will be due upon satisfactory review of the final strategic plan document by SRC Collaborative.

The Colton Group

Pathfinders for Growth

Addendum – References

Colton Group Client References

Joshua R. Elling

Executive Director
Jefferson East Inc.
14628 E. Jefferson
Detroit MI, 48215
(313) 331-7939

Tahirih Ziegler

Executive Director
Detroit LISC
660 Woodward Avenue, Suite 1600
Detroit, MI 48226
(313) 596-8222

Scott Dzurka

President and CEO
Michigan Association of
United Ways
330 Marshall Street
Suite 211
Lansing, MI 48912
(517) 664-9808