



Analysis, Strategy, Impact
Defining Goals and Reinforcing Identity through Strategic Planning

March 7, 2014

Larysa Blyzniuk
Collaborative Director
Southeast Michigan Senior Regional Collaborative

Dear Ms. Blyzniuk:

On behalf of JADE Strategies, it is my pleasure to submit a proposal to Southeast Michigan Senior Regional Collaborative (SRC) relative to providing facilitation in the development of a comprehensive, multi-year strategic plan for the Collaborative.

PERCEPTION: Maximizing Community Impact

Each member of the SE Michigan Senior Regional Collaborative (SRC) maintains a significant role in the nonprofit community and carries a reputation for demonstrating a commitment to serving the most vulnerable populations in the region. Since its inception in 2008, the SRC has grown to become a force of great potential in efforts to provide life enrichment for seniors and adults with disabilities through human service programs, healthy living initiatives and public policy change.

The SE Michigan SRC serves one of the most economically challenged regions in the nation. At a time when funding cuts at state and federal levels - as well as increasingly limited access to private contributions - force nonprofits to reduce staff and resources, it is imperative that organizations pool resources and work together to leverage common relationships. By developing strategy as a Collaborative, the SRC stands to gain significant progress against the challenges that might impede the current, collective vision, which is to “encourage the highest degree of health, well-being and independence” for older adults and adults with disabilities.

In a proactive approach, SE Michigan SRC currently seeks the services of a qualified and experienced Strategic Planning Consultant to guide the organization – its membership and stakeholders-- through a comprehensive planning process resulting in a sound, multi-year strategic plan. Submitted for your consideration, this proposal outlines consulting services designed to facilitate the development of an action-oriented strategic plan that maximizes the SE Michigan SRC’s ability to make significant progress on the organization’s vision.



SCOPE of WORK: Analysis, Strategy, Impact

What do stakeholders value about and need from SRC? What is the Collaborative's purpose in the new economy? How can SRC best reach current and potential stakeholders? What and where are the best partnerships? How will SRC actualize its vision?

JADE Strategies has a demonstrated track record of facilitating successful strategic planning through comprehensive analysis, stakeholder engagement and data-based action planning. This proposal outlines consulting services designed to maximize tSE Michigan SRC's ability to identify clear goals that respond to stakeholder expectations and strategies designed to maximize operational efficiency, increase partnerships, and promote the agency's brand. These facilitation methods will ensure successful strategic planning:

- Stakeholder engagement
- Environmental assessment
- Redefining identity framework (vision, mission, core values)
- Identification and development of operational goals, functional strategies,
- available resources and critical relationships
- Scorecard evaluation process designed for sustainability and success
- Communication

UNIQUE QUALIFICATIONS

JADE Strategies is a management consulting firm serving private, public and nonprofit sector clients in the facilitation of strategic planning, market research, stakeholder engagement, marketing, and organizational change and development. Our consultants execute objectives by performing a thorough analysis of the existing business model and recommending innovative strategies that result in positive impact on relationships, resources and the bottom line.

PERSPECTIVE: Stakeholder Communication Plan

How will interested groups - i.e. members, volunteers, partners and community leaders - stay informed throughout the change process? To what extent and at what point will stakeholder groups be included in decision-making?

In order to be most effective in developing a comprehensive and sustainable plan, it is crucial to approach the strategic process from the perspective of, both, the Collaborative's needs as a viable business, and the community's interests as the primary customers. JADE Strategies' consultants provide well-balanced perspective from years of professional (and academic) experience in both business management and community organizing.



It is critical that SRC conduct a transparent and inclusive process. To support the process, we will *tailor a marketing and communication strategy* for the agency designed to keep interested stakeholder groups

informed on progress and about opportunities for participation.

STRATEGY: Longer-Term Partnership

The best way to test a new bird's ability to fly is to stay by its side when it takes its first flight.

In order for the strategic planning process to be most effective, it has to be more than a well-written document on the shelf. We are committed to helping SRC transition from the framework phase to implementation as part of our standard process. We remain actively engaged beyond the written plan to provide you with guidance designed to lift the strategic transformation process into the air.

EXPERIENCE and EXPERTISE

JADE Strategies' project managers have more than 25 years of experience in working with organizations and communities to develop the mission, vision and core values that clearly represent the expectations of multiple stakeholder groups. We recently completed a strategic process with Area Agency on Aging 1-B, which resulted in a comprehensive, three-year strategic plan. The leadership further demonstrated confidence in JADE Strategies by requesting additional contracts engaging JADE Strategies in senior team training in communication efficiency and RFP process training for regional partner providers.

PROJECT MANAGEMENT

Within the past 20 years, **Joscelyn Davis** has served in several significant leadership positions in the public, private and non-profit sectors, in which she successfully designed and implemented programs in strategic planning, marketing and organizational change strategy. As President of JADE Strategies, Joscelyn works effectively with large and small organizations to plan and execute strategic planning processes that align operations with organizational mission, define the relationship between the organization and its stakeholders and result in operational efficiencies.

Joscelyn's proficiency in facilitating successful strategic planning in the nonprofit and public sectors initially began with experience in the private sector. As Investor & Public Relations Manager for Valassis, a Fortune 500 company, she served as liaison to the Securities & Exchange Commission, investors and international news media. Prior to this, as Corporate Communications Manager for Wall Street reinsurance firm, Center Re, she led departments in New York, Bermuda, London and Dublin. She launched her first successful business in 1995 as principle of Hermes Communications, a PR and marketing firm in Phoenix, AZ. Joscelyn is a graduate of University of Michigan and University of New Haven, where she earned BA and MBA degrees, respectively.



RECENT PROJECTS

- **Area Agency on Aging 1-B** - Facilitated the strategic process and developed the agency’s current three-year plan; also provided agency-wide communication efficiency training and RFP process & collaboration training for regional partner providers;
- **City of Oak Park** - Currently leading the executive staff, City Manager and City Council through the first, formal strategic planning process in the City’s history;
- **OLHSA (Oakland-Livingston Human Service Agency)** - Facilitated a county-wide survey project, performed efficiency restructuring for three departments of the agency resulting in budget reductions, staff repositioning and new business development;
- **Oakland Community College** - Worked with OCC leadership to facilitate a major strategic analysis, which resulted in a significant budget reduction and efficiency reorganization;
- **Oakland County** - Designed the initial strategic plan for the Oakland County Women’s Advisory Commission and continue to provide annual orientation for new sessions;
- **Pontiac Public Library** - Led the library’s first successful millage campaign and developed its first, five-year strategic plan; within two years, library patronage grew by 47%, community partnerships quadrupled and PPL received more than \$250,000 in grants.

DELIVERABLES

SE Michigan SRC can expect to receive the following facilitation services, tools and final documents as a result of the strategic planning process:

FACILITATION	TOOLS	FINAL DOCUMENTS
Staff and Collaborative Visioning Session(s)	SWOTT worksheets; Organizational Change training materials; Agendas	Environmental Assessment; Priorities Chart
Online and Paper Surveys	Survey Instrument Content	Community Survey Report
Stakeholder Focus Group Visioning Sessions	Focus Group Script	
Community Conversations	PowerPoint Presentation	Data Summary
Collaborative Presentation		STRATEGIC PLAN*

*STRATEGIC PLAN includes:

- Process Summary/Methodology
- Scorecard (with timeline/accountability)
- Core Values, Mission, Vision
- Stakeholder Communication Plan
- Goals Framework (with tactics and timing)



APPROACH: Optimal Timeline for Project Completion

Phase One: Discovery

- Review issues/successes to date and clarify deliverables
- Assess current environment
- Identify key stakeholders who can be called upon to identify and encourage community participation in the study (i.e., faith based organizations, local organizations)
- Facilitate leadership planning session – Timeline, Process
- Convene Steering Committee - Process Approval, Environmental Assessment

Phase Two: Data Collection

- Facilitate 3-4 Community Conversations with stakeholder focus groups
- Complete Survey Project – electronic and hard copy
- Conduct key interviews
- Map market (clients, partners)

Phase Three: Establishing Framework

- Collaborative Retreats (2)
- Develop Organization Identity (vision, mission, core values)
- Identify Priorities and Strategies; Scorecard process
- Establish Implementation Strategy & Communication Plan

Phase Four: Presentation of Final Report

- Present to Membership

PROPOSED COMPLETION DATE: September 1, 2014 (or five months from initiation)
PROJECT MANAGEMENT FEE: \$ 12,500

RELATIONSHIP NOTES

On behalf of JADE Strategies, I greatly appreciate your consideration. Please feel free to contact me at any time with any questions about this proposal or any other matter. I can be reached at 248.860.8858 or Joscelyn@JADEStrategies.com.

Sincerely,

Joscelyn Davis
President and Chief Strategist
JADE Strategies, Inc.

Note: The terms of this proposal are valid for 60 days from the date of submission. A signed Agreement and Retainer Fee activates the engagement.



REFERENCES

We are extremely proud of the work we do to maximize our clients' successes.

Please feel free to contact the following, current and past clients of **JADE Strategies** to ask questions and hear more about what we do:

AREA AGENCY ON AGING 1-B

Contact: Tina Abbate-Marzolf, President and CEO
tabbatemarzolf@aaa1b.com; 248.292.9200

CITY OF OAK PARK

Contact: Erik Tungate, City Manager
etungate@ci.oak-park.mi.us; 248.691.7402

OAKLAND COUNTY – WOMEN'S ADVISORY BOARD

Contact: Marcia Gershenson, Oakland County Commissioner, District 17
gershensonm@oakgov.com; 248.808.1032

OAKLAND-LIVINGSTON HUMAN SERVICE AGENCY (OLHSA)

Contact: Brad Michaud, Chief Financial Officer
bradm@olhsa.org; 248.209.2637

OAKLAND COMMUNITY COLLEGE

Contact: Clarence E. Brantley, Vice Chancellor
cbrantl@oaklandcc.edu; 248.341.2177