
Proposal for Services

Organization: SEMISRC
Project: Strategic Planning
Proposal Date: March 7, 2014



Corporate Overview of Aly Sterling Philanthropy, LLC

History:

Aly Sterling Philanthropy (ASP) was founded in the fall of 2007, when after over a decade of successful experience, Aly decided it was time to create a firm that was dedicated to creating fundraising solutions for non-profits of all shapes and sizes. Aly believed that the ability to be successful at raising money for critical missions wasn't the privilege of only large budget, well-established organizations, but that with effective boards and volunteers, clear strategies and a commitment to fundraising accountability, all non-profits had the potential to achieve their goals.

Today ASP is a full-service fundraising, board governance and strategic planning firm, specializing in building sustainable solutions for non-profits. "Sustainable" is a key component to our philosophy and practice as we believe organizations have both the desire and ability to create authentic and manageable systems that result in a continuous cycle of board leadership, donor engagement and transformational gifts.

Contact Information:

Aly Sterling Philanthropy, LLC's headquarters are located in Toledo, Ohio. Our address and contact information is as follows:

1847 Collingwood Boulevard, Toledo, Ohio 43604
Telephone: 419.794.0015 Website: www.alysterling.com
Lead Consultant Email: sara@alysterling.com

Our Experience – Why We're the Right Fit

We understand strategic planning - it is a core service area of our firm. Because of our unique knowledge and first-hand experience in the sector, our engagements are efficient and effective for our organizations, with a consistent, high-degree of success and measurable deliverables.

Additionally, our testimonials and references illustrate the powerful and positive experience of working with our team - we take great pride in our rapport with our clients and their volunteers, as well as our results.

Sara has engaged with several organizations of a variety of scope and size to guide them through strategic planning. Specifically, Sara has worked with larger association-like groups such as **Boys & Girls Clubs of Elkhart County** (Elkhart, Indiana), **Advocates for Basic Legal Equality (ABLE)** and **Legal Aid of Western Ohio (LAWO)** across 32 counties in Ohio, and is also currently engaged with **Boys & Girls Clubs of America** (State of Ohio Alliance strategic plan).

Our Process and Approach

A strategic plan, complete with a realistic and comprehensive assessment of an organization's strengths, limitations and opportunities, is an essential investment for all organizations. Without it, your mission cannot be built. And by our definition, a strategic plan must be useful; one that realistically considers your organizational financial health, effectiveness, capacity and relevance within the community. Our strategic planning model involves three key steps:

:: Step One: ASSESS

Our engagement will begin with a **pre-planning session** with the SRC Strategic Planning Task Force. We'll seek to understand your history, organizational infrastructure, core programs, services, and vision for the future.

Next we'll conduct a series of **pre-retreat surveys** with your membership, staff, and external and community stakeholders. We'll work together to formulate the right questions to pose to gain their insight as to your organization's strengths, weaknesses and opportunities. This element of our process ensures engagement, leverages their expertise and creates ownership of the final results.

:: Step Two: ALIGN

Our pre-work and data collection culminates in this step with a **dynamic strategic planning retreat** where we'll review the data collected and discuss ideas and perspectives within an organized and action-oriented format. In this day-long event, we'll build consensus and seek recommendations for your short- and long-term opportunities and challenges. We'll be sure to include:

- *Key areas/questions as identified by the planning process;*
- *Mission review and development of vision and values statements;*
- *Identification of gap and growth areas;*
- *Exploration of legal, membership, governance, and committee structure.*

:: Step Three: ACT



Following our strategic planning retreat, we'll summarize discussions, interviews and meetings into a **three-year strategic plan document** for review and approval by the full membership. It will include, but not be limited to:

- *Mission, vision, purpose and value statements;*
- *A description of current operating and capacity conditions;*
- *The Collaborative's desired impact over three years, including objectives in all key program areas with indicators of success to track progress;*
- *Strengths and how to apply them to the objectives and desired impact;*
- *Strategic directions, partnerships, and tools that will assist in identifying and implementing future opportunities;*
- *The organizational capacity (at the membership, Steering Committee and Staff level) needed to achieve desired impacts and objectives, and;*
- *Strategic ways and sources of revenue to achieve desired impacts and objectives.*

Proposed Timeline

SEMISRC Strategic Planning Timeline <i>(sample only)</i>	April - May	June - July	August - September
Task Force Planning Session (via conference call)			
Stakeholder and Membership Survey Questions Compiled & Approved, Communication/Invitations Sent			
Strategic Planning Retreat (date TBD)			
Continued Work with Task Force			
Draft Review of Strategic Plan			
Final Strategic Plan Submitted for Membership Approval			

Investment Overview

Strategic Planning

\$12,750*

**Does not include travel and lodging expenses, which will be a separate pre-approved client reimbursable (mileage at .565 cents per mile).*

Lead Consultant/Facilitator



Sara Best, Director of the Board CatalystSM Institute, has worked in the nonprofit and for-profit sectors for over 20 years, providing training and consulting to top companies, groups and nonprofit organizations.

Sara's core expertise and talent can be found within the specialty areas of board governance and strategic planning. Sara is a seasoned and accomplished facilitator of group, team, and board retreats who works with grassroots and emerging nonprofits to ones of regional and national scope and scale. She assists board and staff leadership in developing sound governance infrastructure that leads to deeper board engagement and higher impact.

Born and raised in Toledo, Ohio, Sara obtained a Bachelor's Degree in Social Work from the Ohio State University and a Master's Degree in Administration from Eastern Michigan University. She is a 2008 graduate of *Leadership Toledo* and is a frequently featured speaker at local, regional, and national conferences, including the Michigan Conference of Community Action Agencies, the Association of Fundraising Professionals, and the National Catholic Education Association.

The Aly Sterling Philanthropy Team Approach

We think two (or three...) minds are better than one. Our team is comprised of seasoned professionals - who work collaboratively with one another, and with our clients. **To ensure we stay on time and on budget, your project will be assigned one of our team members as lead once our engagement commences. At the same time, you get the benefit of our whole team's collective knowledge and expertise.** This collaborative approach and the diversity of our backgrounds mean better, more innovative outcomes for our clients.

Client List & References

A list of clients and professional references can be easily provided. Please take a moment to visit our website www.alysterling.com.

Ability Center of Greater Toledo • Advocates for Basic Legal Equality (ABLE), Legal Aid of Western Ohio, Inc. (LAWO) • Anthony Wayne Youth Foundation • Assets Toledo • Assistance Dogs of America, Inc. • Autism Model School • AWAKE • Beach House Family Shelter • Black Swamp Conservancy • Boys & Girls Clubs of America • Boys & Girls Clubs of Elkhart County • Boys & Girls Club of Toledo • Bryan Area Foundation • Catholic Club • Catholic Diocese of Toledo • Central Catholic High School • Child and Parent Services • Children’s Rights Council • COMPASS • Crossroads Community Church • Croswell Opera House • Dental Center of Northwest Ohio • Diabetes Youth Services • East Toledo Family Center • Elkhart County Community Foundation • EPIC Toledo • Equal Justice Foundation • Erie Shores Council Boy Scouts of America • Fair Housing Center • Family House • Fifth Third Bank • Findlay Hancock Community Foundation • First Presbyterian Church of Maumee • Friends of the Animals • Goodwill Industries of Northwest Ohio • Hannah’s Socks • Jewish Federation of Greater Toledo • Jazz Arts Group of Columbus • Josina Lott Community & Residential Services • Junior League of Toledo • Kidney Foundation of Northwest Ohio • Legal Aid Foundation of Los Angeles • Lindsey Volunteer Fire Department • Lutheran Homes Foundation • Lutheran Special Education Ministries • Maumee Valley Habitat for Humanity • Memorial Hospital Foundation • MLK Kitchen for the Poor • Northwest Ohio Development Agency • Northwest Ohio Scholarship Fund • Northwest Ohio Synod • Northwestern Water & Sewer District • Open Door Ministries • Oregon Schools Foundation • PACE (Parents Advancing Choice in Education) • Perrysburg Athletics • Perrysburg Schools Foundation • Pine Tree Legal Assistance • Pisgah Legal Services • Porter Hills Retirement Community and Services • Pregnancy Center of Greater Toledo • ProMedica Health System • Ronald McDonald House Charities of Northwest Ohio • Ronald McDonald House Charities of Southern West Virginia • Sandusky Central Catholic High School • Sauder Village • Schedel Arboretum & Gardens • St. Francis Community Tiffin • St. Joan of Arc Church • St. John’s Jesuit • St. Kateri Catholic Academy & Cardinal Stritch • St. Mary Catholic Central High School • St. Ursula Academy • Sandusky Central Catholic High School • Sunshine Inc. of Northwest Ohio • Sylvania Chamber of Commerce • Sylvania Community Services • Sylvania Franciscans • Sylvania Schools Academic Excellence Foundation • TCAC/Valentine Theatre • Teen Leadership Corps • The Andersons, Inc. • The Columbus Foundation • The Sight Center • The Victory Center • Toledo Area Humane Society • Toledo Area Ministries • Toledo Ballet • Toledo Community Foundation • Toledo Day Nursery • Toledo Metroparks • Toledo School for the Arts • Toledo Urban Federal Credit Union • United Cancer Services of Elkhart County • United North • United Way of Greater Toledo Women’s Initiative • Wayne County SAFE • Wood Lane Residential Services

**Client References: Southeast Michigan Senior Regional Collaborative
March 7, 2014**

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Client engagement in process