

Southeast Michigan Senior Regional Collaborative Strategic Planning Proposal

Submitted by: The Leadership Group LLC

Website: www.theleadershipgroup.biz

Contact Information

Name/Title: Lynda Ronie

Address: 4040 Cranbrook Court, Bloomfield Hills, MI 48301

Phone: 248-647-5090, Mobile: 248-227-4426

Email: Ironie@theleadershipgroup.biz

Name/Title: Dr. Lynda K. Jeffries

Address: 834 Seville Row, Detroit, Michigan 48202

Phone: 313-872-6339, Mobile: 313-515-4363

Email: ljeffries@theleadershipgroup.biz

The Strategic Planning process will be custom-designed with Lynda Ronie and Dr. Lynda Jeffries of The Leadership Group LLC (“TLG”), a Michigan based consulting firm that has extensive nonprofit strategic planning experience. The Southeast Michigan Senior Regional Collaborative (“SRC”) Director and Strategic Planning Task Force will agree with the consultants on the scope of data gathering, the participants and schedule. The Leadership Group will present to the Collaborative Director, Strategic Planning Task Force and ultimately to the SRC Board for review and approval new SRC mission, vision, values, strategic goals, strategic objectives and a timeline. The schedule for this process can be flexible to meet the priorities of SRC.

Statement of Qualifications

Background and History of TLG

The Leadership Group LLC (TLG) was founded in 1997, is a woman-owned business, and specializes in assisting senior management on strategic planning, organization effectiveness, capacity building and leadership development. Our mission is to transform organizations, for profit and nonprofit, by strengthening leaders and internal processes. All seven TLG consultants have held senior level positions in business, have extensive nonprofit experiences in various roles (CEOs, Board members, and consultants) and represent a variety of skills and expertise, including fund development experience.

TLG takes special pride in our ability to partner with our clients and mindfully optimize the use of everyone’s limited time.

Professional Biographies

Lynda M. Ronie

Lynda has served as a senior consultant with The Leadership Group since 2003. She brings more than 35 years of experience in general management, human resources, training, education and leadership consulting. Her expertise includes strategic planning, project management, leadership assessment and development, executive coaching, communications, nonprofit board governance and all facets of organizational development. Prior to joining The Leadership Group, she served for 22 years in key corporate leadership positions with the Auto Club Group headquartered in Dearborn, Michigan. Lynda consults with a broad range of clients representing corporations, educational institutions and nonprofit

organizations and continues a long-standing service as a key consultant with the BEST Project, a nonprofit collaborative in Flint, MI.

Lynda holds a masters degree in communication from the University of Maryland and has taught speech communication at the University of Maryland and Wayne State University. Further, she is certified to administer a number of assessment instruments. She has served actively in leadership positions on numerous nonprofit boards and committees including the Women's Economic Club (now Inforum), the Detroit Urban League, the Detroit YMCA, Haven, the Michigan Women's Foundation, American Heart Association and ArtServe Michigan.

Lynda K. Jeffries, PhD

Lynda has an extensive corporate background in organization development and performance assurance from SBC Ameritech. Currently, as a Senior Consultant with The Leadership Group LLC, Lynda consults in capacity building, diversity inclusion, conflict resolution, team building, executive coaching, and leadership development. As a consultant with the BEST Collaborative in Flint, she custom-designs and facilitates strategic planning sessions, board retreats, and organization assessments. Lynda has a PhD in Education – Training and Performance Improvement from Capella University, a M.B.A. in Management from the University of Detroit Mercy, an Education Specialist Certificate from Wayne State University, and a B.S. in Business Administration from Lawrence Tech. She has taught Leadership and Nonprofit Management at Lawrence Tech and Social Diversity, Business Ethics, Management Principles, and Speech Communication at Davenport University. Lynda is certified in Management Research Group's Leadership Effectiveness Assessment and the Myers Briggs Type Indicator.

Lynda is actively involved in her community and serves in leadership roles on a variety of nonprofit and faith-based boards and committees including, Christian Education Director – Historic Little Rock Baptist Church, Board Chair- Considine Family Life Center, and Immediate Past Board Chair-Presbyterian Villages of Michigan. She was named Distinguished Volunteer (2013) by the Association for Fund Raising Professionals and Trustee of the Year (2014) by LeadingAge of Michigan.

Summary of Similar Work Performed

The proposed consultants for this RFP, Lynda Ronie and Dr. Lynda Jeffries, have a wide range of experiences in nonprofit strategic planning and capacity building. Lynda and Lynda bring a special integrated energy to their work and have partnered on several planning projects including:

- Boys and Girls Clubs of Greater Flint
- Human Relations Commission, City of Flint
- Big Brothers Big Sisters of Greater Flint
- SRC Leadership Development Program

The following are examples of clients for whom the specific TLG consultants proposed for this work with SRC have provided strategic planning or similar services:

Lynda Ronie

- Area Agency on Aging 1-B – Strategic planning and Leadership Development
- Redford Interfaith Relief – Strategic Planning
- Loose Senior Center - Leadership Development
- Contemporary Art Institute of Detroit – Strategic Planning
- Family Service Agency/Visually Impaired Center – Merger of Non-profits

Lynda Jeffries

- Flint Public Library – Organizational assessment, strategic planning co-consultant

- Genesee County Youth Corporation – Organizational assessment, strategic planning
- Habitat for Humanity, Genesee County – Strategic planning
- McFarlan Home – Strategic Planning
- Genesee County Community Collaborative – Organizational structure, planning
- Detroit Public Library – Strategic planning, board governance
- Omega Foundation – Board development, strategic planning

Narrative Description of the Process

The model described below represents our basic approach to strategic planning. We customize this approach to meet the clients time needs, schedule and budget. The elements of the basic model are:

Design Overall Planning Process

The Steering or Strategic Planning Committee designs and coordinates the planning process. The committee solicits additional resources, gains leadership commitment, identifies deliverables, sets timelines, monitors schedules and communicates the importance of planning throughout the organization. TLG brings their strategic planning experience and facilitation skill as well as project management expertise that ensures projects are delivered with high quality, on time and within budget. Milestone accomplishments and timelines are monitored and communicated throughout.

Identify and/or Confirm the Mission

The mission defines the organization's core purpose and the contribution it makes to basic human needs within society. It is a clear statement of the organization's reason for being. An organization's mission statement should include the type of organization (what the organization does), customers (who the agency serves), products and services (what the agency does), and markets (geographically, where does the agency compete).

Create a Vision Statement

The vision is the dream or overarching goal that drives the organization into the future. It is a mental picture of an ideal tomorrow. The vision statement is often short (preferably one sentence) and vividly describes the results of a fulfilled mission. It is usually developed after the mission statement and uses positive, inspirational, and idealistic language.

Document Core Values

Core values are a set of shared beliefs about how to operate, compete, relate to one another, and conduct the organization's business. Values are typically stable and form the foundation for planning and decisions. Examples include integrity, respect, teamwork, customer attentiveness, communication, character, intensity, and discipline.

Conduct an Environmental Analysis

Analysis examines internal and external environments to determine the impact of strategic issues on the organization's ability to fulfill its mission and vision. This could include stakeholder focus groups (internal and external), key informant interviews, surveys, SWOT analysis, environmental scans, gap analysis, or benchmarking.

Develop Strategic Goals

Address strategic issues by developing strategies to achieve the mission and to bridge the gaps. This includes developing SMART goals, action plans, and tactics to identify steps required to reach specific goals.

Provide Guidelines for Implementation and Follow-Up

To support the organization's successful implementation and sustainable progress, TLG offers guidance and structure for plan implementation.

Ongoing Evaluation and Review

Periodically repeat the environmental analysis and assessment of emerging trends and strategic issues. This also includes review of goals, action plans, and tactics to measure performance, evaluate results, and monitor progress toward fulfilling the organization's mission and vision.

Timeline for the Work

The more resources that are committed to the process, the more quickly the Plan can be completed. See the sample timeline below.

Draft Timeline: April - September, 2014

| Timeline | Key Activities | Anticipated Deliverables |
|-----------|---|--|
| April | Contracting Meet with SRC Director to finalize contract and identify tailoring/customizing of the approach | Signed contract |
| April | Define Scope Meeting with Strategic Planning Task Force and SRC Director to finalize the scope of the project, tailoring/customizing, data gathering, participants, meeting schedule, retreat/session dates, final deliverables and timeline for completion. | Work plan that includes: <ul style="list-style-type: none"> • Activities • Timeline • Deliverables • Resources |
| April/May | Document review and/or data gathering Data gathering, review and interpretation. Data planning will include review of existing relevant and current data. This could include review of existing organizational documents including assessment reports, existing plans, environmental scans, trend analysis, SWOT analysis and the community/stakeholder input. If data is not current or additional data is needed to help inform the planning process, the Task Force will direct the method, scope and sources of data (ex: focus groups, interviews, surveys). | Data analysis summary to inform goal setting |
| June/July | Planning Session/Retreat to Create Plan Design/develop, facilitate and document planning retreat/sessions that engage board/key leaders in confirmation of planning elements (mission, vision, values, goals, objectives, timeline) based on data summaries. | Consensus on planning elements |
| August | Final Presentation Present plan and next steps recommendations for approval by the Collaborative Leadership | Board approval |
| Ongoing | Project Management Use work plan and timeline to monitor and track progress to complete project on time and within budget. | Final Report |
| | Detailed Action Planning, Operational planning and Implementation Planning (Optional) | This would be performed by SRC. If consulting time is expected, this would be under a separate contract with a different budget. |

Fees and Budget

TLG is committed to reasonable and fair pricing. We work hard to keep overhead costs low and pass that saving on to our clients. Project investment fees will be based on the final agreement about the scope of and activities in the project. This project is offered at our special nonprofit rate.

| Fee/Budget Category | Hours | Hours Cost @ \$150 | Out of Pocket Costs (estimated at 5% of project cost) | TOTAL COST |
|---|--------------|---------------------------|--|-------------------|
| Contracting | 4 | \$600 | | \$600 |
| Define Scope | 6 | \$900 | | \$900 |
| Document review and/or data gathering | 25 | \$3750 | | \$3750 |
| Summarize data for committee analysis and preparation for planning session. | 16 | \$2400 | | \$2400 |
| Design facilitator and participant agendas and materials for planning session. | 12 | \$1800 | | \$1800 |
| Facilitate planning session and document results. | 12 | \$1800 | | \$1800 |
| Prepare planning document and final report including next step recommendations | 12 | \$1800 | | \$1800 |
| Present final report | 4 | \$600 | | \$600 |
| Project Management (may include additional briefings between consultants and task force) | 6 | \$900 | | \$900 |
| Estimated Out of Pocket Expenses (Mileage and Materials) | | | \$725 | \$725 |
| TOTAL INVESTMENT | 97 | \$14550 | \$725 | \$15275 |

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|--|--|--|--|--|
| (Optional) Detailed Action Planning, Operational planning and Implementation Planning | | | | |
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Addendum

References (Specific to Planning Projects the Consultants have co-facilitated)

| Client | Contact Information | Dates of Service | Description of Services Provided |
|---|--|----------------------|---|
| Bob Nelson Executive Director Boys & Girls Club of Greater Flint | 810-249-3413 bnelson@bgclubflint.org | 2011 2013 | Strategic Planning Coaching |
| Reta V. Stanley President/CEO Big Brothers Big Sisters of Greater Flint | 810-235-7226 rstanley@bbbsflint.org | 2006 2009 2011 | Strategic Planning Coaching Board Development |
| Erycka Hunter Director of Human Resources and Human Relations City of Flint | 810-423-7904 ehunter@cityofflint.com | 2011 | Strategic Planning Coaching |