



30 October 2020

To: Steven Fraher, General Manager
Arcade Creek Recreation & Park District
Email to: sfraher@acrpd.com

From: Kim Tucker, Executive Director
Email: ktucker@impactfoundry.org

Re: Proposal for Strategic Planning Consultant

Thank you for the opportunity to submit this proposal in support of your strategic planning objectives. We believe Impact Foundry is an excellent partner for Arcade Creek Recreation and Park District, and we appreciate being considered to work with you.

Our Strategic Planning Approach

As northern California's nonprofit resource center, we approach all our work from a strengths-based perspective and seek to build the capacity of those who hire us. Research tells us that culture trumps strategy every time. If we don't address the cultural realities of an organization – how they get things done, who has power to persuade, Board's level of engagement, and what budget realities exist – the plan we help you develop will not be successful, no matter how great the plan is. ***In other words, we start where you are and build from there.*** Plans must include action steps and measurable milestones.

Summary of Experience

Our organization exists to provide capacity building to public causes and professional development to those who work in and help lead them (staff, volunteers, board members). We have experienced staff who lead our capacity building program, cultural responsiveness program, and our volunteer training program. We also employ a grants researcher and a community engagement professional because we have over 650 organizational members who rely on us to help them broker relationships with funders, political leaders, community influencers, and each other. Our team also produces the largest nonprofit conference in northern California, the annual What IF Conference, that attracts 900+ people.

I am responsible to my team as their executive director, working with our Board and funders to propel our mission forward. And I am the primary strategic planning facilitator in our organization. Given the scope of work for Arcade Creek, I offer this summary of my experience; and once engaged with you, will tap our team as it is appropriate to support completion of your planning effort.

Kim Tucker, Facilitator & Planning Experience

- Over 100 nonprofit facilitations per year that include small and large nonprofit service providers, statewide associations, government agencies. Recent organizations worked with include:
 - Association of Behavioral Health Contractors
 - Hope Cooperative (supportive housing and services for mentally ill homeless)
 - Sacramento Children's Home
 - Veterans Resource Centers of America (recently renamed Nation's Finest)
- Development of approximately 12 strategic plans per year. Recent projects include:
 - The Arts Education Consortium, a partnership of the 13 school districts and Sacramento County Office of Education, the Sacramento Region Community Foundation and the Friends of Sacramento Arts.
 - Friends of Sacramento Arts, a nonprofit fundraising organization to ensure arts education in public schools.
 - Chief Probation Officers of California
- Oversight of approximately 40 strategic sustainability plans per year. These plans are required outcomes of our primary capacity building program called Certified Sustainable. Examples of the plans are included in this proposal.
- Training areas of specialty include Revenue Structure, Operational Framework, Board Leadership, and Community Engagement. Recent training recipients include:
 - CARES Act funding from City of Sacramento to train 20 arts organizations on how to survive impact of COVID-19, focusing on their funding and business models.
 - Yolo Community Foundation, in partnership with the Yolo Public Library System and Impact Foundry, providing training to any nonprofit in Yolo County.
 - NAMI (National Association of Mental Illness) Solano County - Board training
 - First Five Commission – Sacramento County

Additional experience includes:

- College Degree: Social Work, Pacific Lutheran University
- Certificates of Professional Development (partial list):
 - Leadership California, Class of 2012
 - American Leadership Forum, Class of 2020
- Collective Impact: We build programs and strategic alliances within the Collective Impact framework. Partial list of current partners in these programs include:
 - College of Continuing Education, Sac State (higher education, anchor institution)
 - CxORE Consulting and Fractional Staffing (for-profit business partnership)
 - Team Giving (volunteer matching and training nonprofit)
 - First 5 Sacramento (government agency)

Facilitation Approach: Visioning what is possible is an important component of strategic planning because it allows us to be unbound by the way we've been operating. Visioning without a structure, however, leads to frustration because we will not know where we are going or why. Therefore, it is important that I support a process that is practical as well as inspirational. My job is to engage you in the process – and the 'you' includes your stakeholders and your governance leaders – and ensure your thinking links with your capacity to perform on your objectives. I put it this way, ***"Inspiration without application is hallucination."*** I'm prepared to have difficult conversations in a supportive environment to get at what is true and what is possible, and work on how we fashion a great forward focus.

Detailed Project Budget

Consideration of the scope of work results in these estimates of time by the stages outlined in your RFP:

- Stage 1 – Pre-Planning = 40 hours
- Stage 2 – Strategic Plan Creation = 80 hours
- Stage 3 – Implementation & Evaluation Follow-Up = 40 hours

At an average rate of \$75 per hour, this would result in a \$12,000 quote for services. Review of your approved budget suggests that this cost is greater than what you have available for professional assistance in your strategic planning. Therefore, ***we will cap our quote at \$5,000.***

Ideal Timeline for Scope of Work Completion

1. Tasks outlined in the RFP's Stage 1 include review of existing documents, research and benchmarking, review of the Community Needs Assessment and possibly some surveying of Board and staff. All of this work needs to be completed between date of contract award and preparation of the January 2021 Board retreat agenda, primarily because this information informs how we build the meeting agenda = ideally Q4 2020.
2. Tasks outlined in Stage 2 = Q1 2021
3. Tasks outlined in Stage 3 = Q3 & Q4 2021

Sample Project / Work Plan

Once we have been awarded the contract, it will be incumbent on us to present a project plan that lists the activities and due dates for elements within each stage of the planning process. In fairness to this effort, meeting with you to learn more about your internal capacity to provide documentation and respond to our questions will really help us build a project plan that everyone can support. In the ideal, the date ranges are noted above within each stage of the scope of work. We can add some deliverables, such as training or arranging meetings with subject matter experts in event Board members want to learn about something ahead of our planning retreat, and those topics will become evident during Stage 1 work.

We utilize Monday.com for project management. It helps us keep on track and store documentation as well as internal communications in one digital space. Their template looks like this:

Projects Overview ★ Integrate / 0 Automate / 0 1 Activities / 0 ...

Add board description

Main Table ▼ New Item Search Person Filter Sort ...

This Month		Person	Brief	Creative	Live?	Progress	Client
Project 1			Done	Done	Live	100%	Coca Cola
Project 2			Done	Working on it		34%	Whole foods
Project 3			Waiting for Approval			0%	Ikea
+ Add						45%	

Next Month		Person	Brief	Creative	Live?	Progress	Client
Project 4			Waiting for Approval			0%	Toyota
Project 5			Done			34%	Samsung
+ Add						17%	

Proposed Payment Schedule

For contracts \$10,000 or less, we prefer 50% payment when contract is signed, and 50% payment once scope of work is completed.

References

Gordon Fowler, Principal at 3fold Communications

Email: gordon@3foldcomm.com

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Erin Johansen, CEO of Hope Cooperative

Email: ejohansen@hopecoop.org

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Julie Gallelo, Executive Director of First 5 Sacramento

Email: GalleloJ@saccounty.net

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Julie Rhoten, Executive Director of Stanford Settlement

Email: julie@stanfordsettlement.org

Phone: 916-927-1303

Sample Plans (total 4)

Appended to this proposal are the following plans:

Chief Probation Officers of California: facilitated statewide convenings and conducted individual and small group interviews; drafted report for CPOC staff to incorporate into their internal and external communications strategy.

Certified Sustainable Program Plans

We led training and technical assistance over 10-month period and facilitated board planning sessions that resulted in sustainability plans, which was the graduation requirement to complete our program. Included here are the plans for:

1. Franklin Neighborhood Development Corporation
2. Opening Doors, Inc.
3. Stanford Settlement

To help transmit our proposal, we've separated the example plans to keep overall file size manageable. If any of our samples are not received, please alert me.

Layout of Plans: We follow best practices in the layout of plans that we develop that can include this list of components. Not all final plans include everything, but we start here to ensure we include the most important information:

- Vision, Mission, Values
- History of Organization, including summary of planning effort
- Headline Goals (ideally not more than 3-4) – these reflect the values within categories of the organization's work (e.g., Provide Excellent Programs, Be an Employer of Choice)
- Within each headline goal, there are a series of:
 - Objectives – these are goals that are measurable
 - Strategies – the topic areas of activity that support meeting the goal
 - KPIs (key performance indicators) – the way we plan to measure our results
 - Tactics – activities that support the strategy
 - Measurements – of the tactics
- Fund Development Plan
- Strategic Communications Plan

Contact Information

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Thank you for the opportunity to provide this proposal. We are available to answer any questions during your deliberation process.