

Background

On January 7th Joey Pauley and ██████████ ██████████ regarding a possible organizational development project. During the meeting, ██████████ described ██████████ current challenges, which included the need to streamline processes, improve operational efficiencies, and be proactive about ██████████ while protecting superior service to ██████████

Project Outcomes

The following outcomes are typically achieved from implementation of a realistic, relevant and flexible Strategic Development Plan and implementation with focus primarily on addressing internal priorities:

1. Collaboration and coordination of department processes and employee processes/roles.
2. Common vision and goals for all leaders in the organization.
3. Structure and processes to guide all employees towards achieving the new vision and to embrace new processes.
4. Stronger financial management, analysis, and decisions.
5. Increase efficiency.
6. Streamline communication and sharing of information.
7. Enhanced credibility and image among stakeholders.
8. Overall, more proactive direction-setting, decision-making and problem-solving.

Initial Project Activities and Deliverables

1. Organizational assessment and development planning, including initial assessment and recommendations, resulting in a written Assessment Report and an Organizational Development Plan to address issues described in the Report.
2. Staff development, including engagement, staffing, process improvement and streamlining, and organization of members, along with comprehensive, step-by-step guidelines and materials for all critical and ongoing activities, resulting in written Organizational Development Plan.
3. Strategic planning, including customizing planning process, identification and/or clarifications of all critical issues and specific strategies to address each issue, resulting in a written relevant, realistic and flexible Strategic Plan.
4. Leadership and supervisory development, including identifying performance goals for each position, clarifying roles and organization, and customizing employee performance management system, along with comprehensive, step-by-step guidelines and materials for all critical leadership and supervisory activities, resulting in an Organization Chart, Process Flow Chart, a Staffing Plan, assistance with revising job descriptions and an revising handbook of Personnel Policies.

Project Work Plan

Ongoing Coaching for Change

Coaching will be focused on the successful implementation and evaluation of a Strategic Plan, resulting in an overall successful organizational development and change strategy. Learning will be identified, documented and shared on an ongoing basis during the project.

1. Half-hour coaching sessions for ██████████ every two weeks for approximately 12 months.
2. Monthly, half-hour coaching sessions with department leader for 12 months.
3. Bi-yearly team development (group coaching) sessions for entire department.

Phase #1: Organizational Assessment

██████████ organizational information, for example, history, turnover, absenteeism, quality or productivity measures, production figures, past survey results, products and services, and current activities, etc. in order to: understand history and existing characteristics of the organization; confirm or disconfirm assumptions.

2. Conduct a technology audit.
3. Stakeholder interviews and focus groups to gather perceptions, in order to: build rapport with individuals, gain perspective of different views, identify and connect patterns, understand issues at a deeper level; collect qualitative data to complement quantitative data
 - a. Staff interviews ██████████
 - b. Focus groups ██████████
4. Meeting Observation: Observing meetings as a neutral, third party in order to: understand the client's leadership style, the meeting culture, decision-making, communications, and group dynamics.
5. Stakeholder Surveys: Gather perspectives from a wide range of people; collect quantitative data that can be used to measure progress over time.
 - a. Staff interviews ██████████
 - b. Entire ██████████
6. Comparison of ██████████ best practices at other ██████████.
7. Develop steering committee.
8. Coordinate quick, comprehensive, practical organizational assessment of all internal functions, preferably with input from key stakeholders/leaders and employees, and then produce written Organizational Assessment Report.
9. Present Organizational Assessment to steering committee and communicate to broader organization.

Phase #2: Develop “Plan for Plan” for Strategic Development Plan

Plan-for-Plan will specify parameters for developing the Strategic Development Plan. It will address at least the following priorities:

1. Orient steering committee about the strategic development planning, its purpose and their role in the planning.
2. Focus the Strategic Plan for a one-year period for the development of internal systems and processes to address the issues described in the Organizational Assessment Report.
3. Establish a Planning Committee to oversee development of Plan. Ideally, the Committee is comprised of steering committee, department leaders, and staff employees.
4. Analyze how members of each department and employees can realistically take part in strategic planning, and then refine a three-month schedule of planning activities to develop and approve a Strategic Development Plan.

Shortly after this phase, various groups will be assigned homework to identify strategic goals and strategies.

Phase #3: Identification of Strategic Goals and Objectives

Based on the issues described in the Organizational Assessment Report, goals in the Strategic Development Plan might pertain to following areas that are in addition to those itemized in the previous section, “Initial Project Activities and Deliverables”. Note that achievement of all the strategic goals will not necessarily be done within the four-month time period in which the Strategic Plan will be developed and approved. Also note that planners might modify the following list during planning.

1. Staffing analysis, including identifying and organizing expertise needed to implement the Strategic Development Plan, support desired products and services, modification of job descriptions, analysis of employee performance management and compensation systems, resulting in approved up-to-date job descriptions, employee performance management practices (in Personnel Handbook), and compensation practices (in Personnel Handbook).

██████████ Sustained public relations to key stakeholders, to convey the “transformed” Transitioning Business, resulting in a public relations campaign, guided by Steering Committee.

Shortly after this phase, various groups will be assigned home to identify action plans.

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Phase #4: Action Plans to Strategic Development Plan

1. Actions plans, in the Strategic Plan will include:
 - a. Objectives ██████████
 - b. Responsibilities ██████████
 - c. Deadlines for completion ██████████
2. Actions plans will also include:
 - a. Staffing plans ██████████
 - b. Operating budget ██████████
 - c. Process Improvement Workflows ██████████
3. Actions plans will also include development of a one-year schedule during which the Strategic Plan will be implemented, with provision of status reports ██████████ stakeholders/project sponsor and key employees.

Shortly after this phase, various groups will be assigned homework to being drafting the Strategic Plan document.

Phase #5: Development and Approval of Strategic Plan Document

Includes:

1. Drafting Strategic Plan document ██████████
2. Review by project sponsors and senior management ██████████
3. Approval by project sponsors ██████████

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Approaches to Evaluating Project

Focus of Evaluation Plan(s)

██████████ Evaluation planning should be based on the project’s goals and outcomes. After the goals and outcomes have been finalized, the consultant and client will work together to establish the focus of each Evaluation Plan. Plan(s) could focus on:

1. Project activities, as those activities (formative, process evaluation).
2. Project deliverables (proposed deliverables are listed in the above section, “Initial Project Activities and Deliverables”).
3. Outcomes achieved by the project (the proposed outcomes are listed in the above section, “Project Outcomes”).

Contents of Evaluation Plan(s)

The consultant and client will work together to design the content of each Evaluation Plan, which will include evaluation questions, information needed to answer each question, and methods to gather and analyze that information

Proposed Project Schedule to for Strategic Development Plan

Phase	Feb 15	Feb 22	Feb 29	Mar 7	Mar 14	Mar 21	Mar 28	Apr 4	Apr 11	Apr 18	Apr 25	May 2	May 9	May 16	May 23
1. Organizational assessment and report										██████████					
2. “Plan for Plan”															
3. Identify goals and strategies															
4. Develop action plans and resource needs															
5. Draft, review and approve Strategic Plan		██████████	██████████	██████████					██████████						

Estimated Time Required to Produce Strategic Development Plan

(Time is in hours. Project Sponsor: ██████████, Client: ██████████, Steering Committee: ██████████)

Activity	Senior	Each Member	Steering Member	Consultants
Preparation	██████████	.5-1	0	6
Phase 1: Organizational Assessment (hours span over 6-week period)	6-10	1-2	0	125
Phase 2: Plan for Plan (hours span over 1-week period)	2-3	.5-1	5-10	40
██████████ & Objectives (hours span over 4-week period)	1	10	8	120
Phase 4: Action and Resource Planning (hours span over 4-week period)	10	3	6-8	60
Phase 5: Approve Plan (hours span over 6-week period)	5	2	5	60
Total Hours Required	39	17-19	24-31	411

Estimated Time to Completely Instill New Systems

The focus of this project is to instill new systems as a foundation ██████████ about change, such that the outcomes of the project are achieved. However, the long-term health of the organization depends on how well those new systems are fully integrated and utilized on a regular basis throughout the organization. Complete change often involves changing the culture of the organization, realistically, that can take a year or more. The amount of time to make those new systems an automatic part of operations for the client depends primarily on leadership and amount of resources that the client can apply to the change effort, and on whether any unexpected major events occur during the effort.

Overall organizational development activities in this project will occur during a twelve-month period, including a three-month period of coaching that follows the four-month development of the Strategic Plan document. The coaching will be focused on successfully managing organizational change during that twelve-month period. Approximate time for coaching sessions is:

Activity	Senior Leaders	Department Leads	Team Members	Consultants
Ongoing Coaching	1 hr (biweekly)	1 hr (monthly)	3 hr (biyearly)	120 aprox (yearly)

Roles and Responsibilities

Consultant

1. Provide prompt response to client communication. ██████████
2. Provide ongoing coaching as needed for a 12-month period. ██████████
3. Administer organizational assessment; analyze results and generate a written Organizational Assessment Report and Organizational Development Plan. ██████████
4. Generate written Organizational Development Plan. (Process Flow Charts and Process Improvement Plan) ██████████
5. Facilitate staffing analysis, including roles and structures; review of Staffing Plan. ██████████
6. Facilitate strategic planning process, including customization and development. ██████████
7. Review draft of Strategic Plan document. ██████████
8. Facilitate development of employee performance management system. ██████████
9. Provide complete step-by-step guidelines and materials for organizational assessment, all aspects of strategic planning, staffing analysis, roles and structures, and employee performance management. ██████████
10. Co-generate written status reports shortly after end of all phases of project. ██████████
11. Regularly reflect, document and share learning from the project with the client and members of the client's organization. ██████████

Client

1. Provide prompt response to consultant communication. ██████████
 2. Provide adequate organizational information for consultant to understand the organization. ██████████
 3. Finish organizational assessment. ██████████
 4. Senior Leader participates in biweekly half-hour coaching sessions for 12 months. ██████████
 5. Department Leads participate in biweekly half-hour coaching session for 12 months. ██████████
 6. Board and staff coordinate and participate in meetings as planned, including training and strategic planning sessions. ██████████
 7. Promptly finish actions as necessary between meetings, including preparation for upcoming meetings and actions identified from the meetings. ██████████
 8. Form Steering Committee to oversee development of Strategic Development Plan, including review of status of activities and written reports from consultant. ██████████
 9. Co-generate written Strategic Plan, organizational chart, Staffing Plan, job descriptions and arrange for expert review and development of updated personnel policies. ██████████
- Regularly reflect and document and share learning from the project with the consultant and members of the client's organization. ██████████

Proposed Costs and Payment Terms

Fees	Hours	Costs
██████████ ation	██████████	██████████
Ongoing coaching for twelve months	██████████	██████████
Phase 1: Organizational Assessment	██████████	██████████
Phase 2: "Plan for Plan"	██████████	██████████
Phase 3: Identify goals and objectives	██████████	██████████
Phase 4: Action and resource planning	██████████	██████████
██████████ ize Strategic Plan	██████████	██████████
Total Fees:		██████████
Material and Expenses:		To be determined
Session materials:	██████████	To be determined
Total Estimated Materials and Expenses:		To be determined
Total Estimated Project Cost:	██████████	██████████

Payment Terms

- ██████████ invoiced to client upon signing contract (equal to fees for Phase 1)
- ██████████ invoiced after Phase 1.
- ██████████ invoiced after Phase 2 ██████████
- ██████████ invoiced after Phase 3 ██████████
- ██████████ invoiced after Phase 4.
- ██████████ invoiced after Phase 5.

Ongoing coaching will be charged on a monthly basis.

Materials and expenses invoiced within two weeks of incurring them; copies of receipts attached to invoice.

Payments due from client within 30 days of receiving invoice from consultant.

