Strategic Planning: Catalyzing Sustainable Change
A Proposal to the Mountains Recreation and Conservation Authority
for work with Santa Monica Mountains NRA
June 4, 2013

Statement of Intent
The Leavitt and Associates Team envisions this project going beyond simply developing a Strategic Plan: we see it as a vehicle that will inspire and harness new levels of creativity, commitment, and enthusiasm from Park staff. We believe this engagement of staff will, in turn, shape the Park’s future in bold and exciting ways. Our goal is to deliver superb service and a remarkably powerful process to everyone involved. Throughout, we intend to take the extra steps that will turn something really good into something memorable.

Elements of the Process
Below are the components of the Strategic Planning process, the overall purpose of which is to catalyze significant and sustainable positive change at SAMO.

1. Organizational Culture Survey & Written Assessment
This online survey, made available to all Park employees, will allow us to create a written Assessment of current Park culture. The Assessment will in turn provide critical information regarding the organization’s readiness for change. This will help identify internal obstacles that need to be resolved for the strategic planning work to succeed.

Online set-up and coordination for up to 120 people: $650
Content analysis/written summary: $3400
Design of internal Employee Feedback Session: $625

Cost for Surveys & Narrative Summary/Assessment: $4675

2. Forecasting Session
This 3-day session for up to 50 participants will include the following:

- Considering the principles of effective strategic planning in a complex, unpredictable, rapidly changing operating environment.
- Providing an overview of the strategic planning process.
- Establishing/validating the Park’s Core Purpose and Values.
- Providing an assessment of the Current State and Anticipated Future Trends for specific influences outside the Park.
- Developing a Forecasted Vision with specific initial milestones and timelines.
Session design & audio/visual materials prep: $2150
Coordination/prep for Park facilitation & support team: $965
Logistics, supplies & session coordination: $1645
Timelines & session materials prep: $1200
Session Results documentation & Summary: $1800
Onsite session delivery: $21,327.50

Cost for Forecasting Session: $29,087.50

3. Backcasting Session & Strategic Plan Completion
This 2.5-day session for up to 50 participants will include training and direct experience in paradigm shifting, process innovation, and the underlying principles of breakthrough performance. From this foundation we will:

- Develop a breakthrough Backcasted Vision with specific initial milestones and timelines.
- Develop specific Breakthrough Projects by contrasting the Forecasted and Backcasted Visions.
- Identify Breakthrough Strategies, Breakthrough Project Teams, and Breakthrough Project Team Leaders to close the gap between the Forecasted Vision and the breakthrough Backcasted Vision.
- Generate the material needed to create a draft Strategic Plan.
- Provide participants with training and tools for leading change.

Session design & audio/visual materials prep: $2137.50
Coordination/prep for Park facilitation & session support team: $965
Logistics, supplies & overall session coordination: $1645
Timelines & session materials prep: $1200
Session Results documentation & Summary: $2225
Initial Strategic Plan draft: $1625
Employee Feedback Session design: $400
Onsite session delivery: $15,000

Cost for Backcasting Session: $25,197.50

4. Coaching, Coordination, & Support Calls (w/ Strategic Plan Project Team)
In addition to allowing for needed project coordination, these calls will provide critical continuity and leadership coaching for senior Park leaders responsible for the strategic planning process. A Strategic Plan is simply a tool for producing sustainable positive
change in the organization; these calls will provide SAMO’s leaders with the guidance they need to utilize that tool effectively and produce lasting change.

- **Call 1**: Review project timeline; develop final Plan product specs; determine planning horizon & key categories; assess previous SP materials; explain online survey process.
- **Call 2**: Debrief written summary report; prepare for Employee Feedback Sessions.
- **Call 3**: Debrief Employee Feedback Sessions.
- **Call 4**: Prepare for Forecasting Session.
- **Call 5**: Debrief Forecasting Session.
- **Calls 6-8**: Prepare for Backcasting Session.
- **Call 9**: Debrief Backcasting Session.
- **Calls 10**: Prepare for Employee Feedback Session 2.
- **Call 11**: Debrief Employee Feedback Session 2, prepare to finalize Plan.
- **Call 12**: Finalize Plan.
- **Calls 13-15**: Implementation coaching and follow up.

**15 calls @ 90 minutes each: $7087.50**

**5. Estimated Travel, Food & Lodging Expenses (3 staff X 2 sessions)**

- **Airfare for 2 trainers X 2 trips**: $2000
- **Mileage reimbursement for Logistics Lead**: $847.50
- **Meals & Incidentals**: $2130
- **Lodging**: $3375
- **Rental car**: $400
- **Gas/tolls/misc**: $200

**Total estimated expenses for two sessions**: $8952.50

**Total Proposal Cost**: $75,000.00

**Payment Terms**
Payments will be made in three equal installments of $25,000. The first will be due by July 1, the second by Sept 1, and the third on Nov. 15. Separate invoices will be provided in advance of these dates.
Confirmation of Proposal:

_________________________________________  ________________________
Joshua Leavitt                                 Date
Leavitt & Associates

_________________________________________  ________________________
Lisa Soghor                                    Date
MRCA