



## **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.



LEAVITT & ASSOCIATES

Helping Teams Lead More Effectively

**Confirmation of Proposal:**

\_\_\_\_\_  
Joshua Leavitt  
Leavitt & Associates

\_\_\_\_\_  
Date

\_\_\_\_\_  
Lisa Soghor  
MRCA

\_\_\_\_\_  
Date