



## PROPOSED STATEMENT OF WORK:

### Arizona Developmental Disabilities Planning Council (ADDPC) - Strategic Plan Development

#### Opportunity Statement

ADDPC is a unique institution composed of six staff and a 23-member volunteer council who work together to support projects designed to improve the quality of life and outcomes for individuals with disabilities across the state of Arizona. Founded in 2009 as the successor to the former Governor's Council on Developmental Disabilities, ADDPC was launched with a vision of inclusion and advocacy. Under the current administration and leadership, ADDPC is committed to continuously improving its services and offerings to best meet the needs of its constituents in Arizona.

With a strong foundation to build upon, ADDPC is seeking support in strategic planning. The strategic plan should capture the next iteration of effort as ADDPC continues leading the way in advocacy, inclusion and improving access and services, as outlined in the Developmental Disabilities Assistance and Bill of Rights Act of 2000. The strategic plan should reflect the heart of ADDPC, ensuring that existing assets are identified and built upon, and that the institution as a whole is afforded the opportunity to honestly reflect about where it needs to improve. In addition, the plan should:

- Be more than a final deliverable. The goal is to create a plan and a process for living out the plan.
- Be completed in such a way that it is authentic and meaningful while also satisfying federal compliance requirements.
- Be informed by the broader vision and direction of the state and governor.
- Engage those who participate in, and benefit from, the Council's work as contributors, partners, and "end users" (e.g.: funded partners, individuals with disabilities, disability advocates, etc.).

Thus, as ADDPC begins the strategic planning experience, it does so with a few key considerations top of mind. These include:

- Strategic plans have been used to drive action at ADDPC and are also an expectation of the federal government to receive various funding streams. This plan must support driving action and decision-making as well as to maintain compliance with federal expectations.
- The ADDPC team has been actively working through implementation of an existing strategic plan; this strategic planning process must account for what needs to continue from the existing plan.
- Strategic planning operates on a five-year cycle.
- The current strategic plan sunsets at the conclusion of the 2021 thus requiring a new plan to launch no later than June 30, 2021.

## Objectives:

Bearing these considerations in mind, Improvement Assurance Group proposes to provide professional consultation and support services to assist ADDPC in the development of their next strategic plan. Through project-based deliverables, the IAG team will come alongside the PC Strategic Planning Committee to:

1. Establish an inclusive, transparent, and robust strategic planning process
2. Identify current areas of strength and key focus areas for improvement
3. Establish measurable goals and strategies to meet them

While the specific timeline is negotiable and dependent on scheduling and coordination with ADDPC's calendar, we estimate the total project to require ten to eleven months to complete.

Throughout the process, IAG will function as a partner to ADDPC. We believe that our role is to help each of our clients access the expertise and assets that already reside within the organization to become the best version of their authentic selves. We do this through combining our expertise in process development and continuous improvement with strong foundations in Appreciative Inquiry and Results Based Facilitation. This combination allows our team to guide you through a process that is uniquely tailored to your strengths while creating the conditions necessary to take an honest and objective look at opportunities to improve. Once these are identified, we will support your team in developing strategies for improvement that are tailored to local needs and the organizational culture your team is working to create.

## Proposed Solutions, Process, and Key Deliverables

Phase One: Foundation-Setting	
<p>The first phase of work ensures alignment and clarity of expectations between the consulting team and ADDPC Strategic Planning Committee (SPC), as well as sets a tone of inclusiveness and transparency from the project outset. During Phase One, key process participants will be identified and the support structures necessary to ensure project progress will be established. Elements of Phase One and Phase Two may run concurrently.</p>	
Process Benchmarks	Deliverables
<p>(details below are not intended to be an exhaustive list, rather they include a selection of the highest impact supporting actions)</p> <p>Understand previous approaches to strategic planning, including what worked well, where there is opportunity to improve and the expectations of partnership with a professional consulting firm.</p> <p>Establish support structures essential to process progress.</p> <ul style="list-style-type: none"> <li>• Facilitate a kick-off session with Strategic Planning Committee and essential staff/individuals to:               <ul style="list-style-type: none"> <li>▪ Review expectations and timelines</li> <li>▪ Establish a shared vision for strategic planning and the role it will play in the ongoing improvement of PC</li> <li>▪ Generate agreement on the essential intended functions of the strategic plan</li> <li>▪ Create role clarity within the partnership between Strategic Planning Committee and IAG team</li> <li>▪ Revised the proposed process to account for budget and time limitations</li> <li>▪ Inform the final product(s).</li> </ul> </li> <li>• Map key process benchmarks against the ADDPC calendar.</li> <li>• Convene the Strategic Planning Committee to examine the ADDPC ecosystem and generate consensus on who (individuals, organizations, types of stakeholders, etc.) should be engaged, at what level, and how, in the strategic planning process.</li> </ul>	<ul style="list-style-type: none"> <li>• Detailed project plan with specific timeline for action</li> <li>• Engagement plan for collecting input and perspectives from key stakeholders</li> </ul>



<b>Phase Two: Envisioning the Desired Future</b>	
<p>This phase functions as the time for vision-setting by engaging identified stakeholders in imagining and describing ADDPC's ideal future, the possibilities held in achieving that desired future, and the potential consequences of not realizing it. Contributions to this phase may be concurrently gathered from process participants during the current state investigations described in Phase Three.</p>	<p><b>Deliverables</b></p> <ul style="list-style-type: none"> <li>• Current state inquiry and analysis plan</li> <li>• Future State Road Show</li> </ul>
<p><b>Process Benchmarks</b> (details below are not intended to be an exhaustive list, rather they include a selection of the highest impact supporting actions)</p> <p>Engage stakeholders/system representatives in describing the organization's desired future. This engagement can be successfully accomplished in collaboration with the Strategic Planning Committee. IAG will work with the team to determine:</p> <ul style="list-style-type: none"> <li>• Who should be engaged</li> <li>• The most appropriate mechanism for engagement of each stakeholder group (e.g.: survey, focus group, one-on-one interview)</li> <li>• A schedule for engagement</li> <li>• Assignment of resources (IAG team and Strategic Planning Committee) to conduct the various engagements</li> </ul> <p>In this stage, the consulting team can conduct a 'road show' to gather preliminary input from stakeholders across the state.</p> <p>Create an explicit link between Phase Two (Desired Future) and Phase Three (current state).</p> <ul style="list-style-type: none"> <li>• Complete a "Perfect 10" exercise to define success across key dimensions of the organization</li> <li>• Identify core indicators to serve as the 'vital signs' of the Desired Future</li> <li>• Establish a detailed plan to assess the "current state" of the system in juxtaposition to the Desired Future.</li> </ul>	

<p><b>Phase Three: Data, Discovery &amp; Defining “Current State”</b>  The purpose of this phase is to use a variety of qualitative and quantitative data sources to gain an accurate understanding of ADDPC’s current reality through the lenses of multiple stakeholders. This phase is characterized by significant stakeholder interaction and engagement and sets the Strategic Planning Committee up to identify specific priorities and associated goals that align with the vision/desired future reality laid out in Phase Two.</p>	
<p><b>Process Benchmarks</b>  (details below are not intended to be an exhaustive list, rather they include a selection of the highest impact supporting actions)</p>	<p><b>Deliverables</b></p>
<p>As necessary, develop data collection tools (e.g.: surveys).</p> <p>Gather and review performance data.</p> <ul style="list-style-type: none"> <li>• Build an understanding of the key data points currently used to measure and track internal performance as an organization.</li> <li>• Use the participant list generated during Strategic Planning Committee Design Session (Phase One) to engage crucial internal and external stakeholders/stakeholder groups (e.g. staff, policy makers, other state agencies, individuals with disabilities and their families) through surveys, and/or small group sessions as defined in the current state inquiry and analysis plan.</li> <li>• Establish a baseline and historical trend line reflecting performance over time, as well as a working understanding of the most significant factors influencing the organization’s performance trends.</li> </ul> <p>Synthesize internal and external data gathered to develop a complete understanding of the organization’s current reality.</p> <p>Identify the points within the current strategic plan to keep, change, or release based on future state vision and current reality.</p> <p>Develop a mechanism to provide feedback/updates to ADDPC community, keeping them informed of strategic planning progress and next steps.</p>	<ul style="list-style-type: none"> <li>• Data collection tools</li> <li>• Current State Key Findings</li> <li>• Mid-point communication (FAQ &amp; update deck)</li> </ul>



<p><b>Phase Four: Focus, Strategy &amp; Action</b></p> <p>This final phase brings the data examined, discussions facilitated, and vision for the future over the prior three phases together to form the substance of the final strategic plan. Here, the Strategic Planning Committee will transition the work from understanding to action as they establish strategic priorities, discern strategies for improvement and develop a plan for action and accountability as it relates to the strategic plan.</p>	<p><b>Deliverables</b></p>
<p><b>Process Benchmarks</b> (details below are not intended to be an exhaustive list, rather they include a selection of the highest impact supporting actions)</p> <p>Facilitate the Strategic Planning Committee to:</p> <ul style="list-style-type: none"> <li>• Review current state data.</li> <li>• Articulate a set of organizational priorities.</li> <li>• Establish strategic organizational goals, each aligned to and in support of one or more of the articulated priorities.</li> <li>• Align priorities to organizational ‘vital signs’ (established in Phase Two).</li> <li>• Engage stakeholders in constructing solutions for implementation and improvement via a four-stop statewide ‘road show’.</li> <li>• Identify the highest impact actions/strategies that will support goal achievement.</li> <li>• Define performance measures and the data collection system that will track performance measures.</li> </ul> <p>Synthesize materials from all phases to produce the final ADDPC Strategic Plan.</p> <p>Publish the strategic plan for public review and comment.</p> <p>Develop an externally facing version of the strategic plan for wide circulation to stakeholders.</p> <p>Debrief Strategic Planning process.</p>	<ul style="list-style-type: none"> <li>• Solutions Road Show</li> <li>• Strategic Plan: full document</li> <li>• Strategic Plan: externally facing document</li> </ul>

## Proposed Timeline and Schedule

To ensure successful completion of deliverables in time to launch the strategic plan in academic year 21/22, we propose the following timeline:

Figure 1: Proposed Timeline

	Aug '20	Sept '20	Oct '20	Nov '20	Dec '20	Jan '21	Feb '21	Mar '21	April '21	May '21	June '21
<b>Phase I: Level Setting</b>											
<b>Phase II: Desired Future</b>											
<b>Phase III: Current Reality</b>											
<b>Phase IV: Focus, Strategy, &amp; Action</b>											
<b>Plan Launch</b>											

Within this timeline, IAG requests a bi-weekly 30-minute phone meeting with the primary point of contact(s) for strategic planning. This time will be released in the event it is not needed. Generally, the time will be used to:

- Discuss significant updates or changes at the local level that could impact the strategic planning process
- Align expectations between PC leadership and the IAG team
- Conduct scheduling
- Inform communication efforts
- Preview and finalize plans for the Strategic Planning Committee sessions

Engagement with the Strategic Planning Committee is best planned well in advance. We recommend setting all Strategic Planning Committee Sessions for the first half of the timeline at the point of kickoff and for the second half of the timeline in December.

## Budget

Figure 2 details the budget associated with completion of this proposed SOW. While this represents our best estimate of the time and cost required to complete the scope as designed, the actions and budget can be adjusted to meet client needs. Changes to the scope may result in increases or decreases in total cost and will be discussed with the client and documented before acting. Total cost is based on the state approved rate of \$143.00/hour.

Figure 2: Proposed Budget

Phase	Action Steps and Deliverables	Time	Estimated Cost
Phase One: Foundation-Setting	<ul style="list-style-type: none"> <li>Up to two, three-hour sessions with the Strategic Planning Committee and/or stakeholders</li> <li>Finalization of Strategic Planning process and project benchmarks</li> <li>Detailed project plan with specific timeline for action</li> <li>Engagement plan for collecting input and perspectives from key stakeholders</li> </ul>	24.5 hours	\$3,503.50
Phase Two: Envisioning the Desired Future	<ul style="list-style-type: none"> <li>Creation of Success Statements</li> <li>One half-day session with the SPC</li> <li>Future State Road Show to include 1.5-2 hour facilitated sessions with key stakeholders in five key geographies across Arizona</li> <li>Success Statements</li> <li>'Vital Signs'</li> <li>Community-informed priorities</li> </ul>	115 hours	\$16,445.00
Phase Three: Data, Discovery & Defining Current State	<ul style="list-style-type: none"> <li>One half-day session with the SP Committee</li> <li>One full-day session with the SP Committee</li> <li>Development, administration and analysis of one survey to assess key components of the desired future as well as strengths, weaknesses and opportunities within the current state</li> <li>One, two-hour data design session with ADDPC leadership</li> <li>Success statements</li> <li>Survey instrument</li> <li>Raw survey data</li> <li>Current state summary and findings report</li> </ul>	148.5 hours	\$21,235.50
Phase Four: Focus, Strategy & Action	<ul style="list-style-type: none"> <li>One half-day SPC session</li> <li>Solutions Road Show to include 1.5-2 hour facilitated sessions with key stakeholders in five key geographies across the state to gather feedback on the first version of the plan</li> <li>One full day session with SPC and workgroups for each goal area</li> <li>One, half-day session with SPC and workgroups</li> <li>Up to three two-hour sessions with ADDPC leadership to synthesize and make final decisions on plan contents (full and external versions)</li> <li>Strategic Plan Draft</li> <li>Strategic Plan Community Commentary and Revisions</li> <li>Strategic Plan: full document</li> <li>Strategic Plan: accessible externally facing document</li> </ul>	196 hours	\$28,028.00
Subtotal			\$69,241.00
Administration			\$6,924.00



In Kind	Up to \$10,000.00 in travel and staff time
Total Project Cost	\$86,135.00
Total Cost to ADDPC	\$76,135.00

**Please note:**

- All costs quoted reflect a 50% nonprofit or government discount rate.
- While certain elements are considered essential for the success of the project deliverables, other elements could be adjusted without compromising the intent of the scope.
- Adjustments to the scope may result in adjustments of fees (up or down).
- Unless otherwise agreed upon, the client will be responsible for day-of facilitation and session costs incurred (i.e. printing and materials, food, venue, etc.) for work associated with this scope.

**Payment & Fees**

- **The total project fee as described is \$76,274.00.** This cost encompasses work as described above. Key cost drivers and limitations for each phase are noted in the proposed budget. Adjustments to the key cost drivers may result in adjustments to the project fee, either up or down.
- IAG will invoice upon completion of each phase of work as described in the budget. Payment terms are set at NET30.
- IAG accepts checks and ACH transfers only; all transfer fees are payable by the sender.
- A fee of \$100 will be assessed for all returned checks.