

## ***Consultancy Services Proposal: Assisting with the Strategic Plan Update for the Children's Trust of Alachua County***

### **ABOUT OUR FIRM**

C Robinson Associates, Inc. (CRA) is a performance improvement firm with offices in Florida, Georgia, and Ohio. We specialize in developing and delivering customized consulting services in Strategic Planning, Organizational Assessment, Program Development, Individual and Organizational Effectiveness, Program Management, and Transformational Leadership.

#### **People and processes are our business.**

CRA's record of success and reputation is around strong and effective partnerships with our clients. We work with a diverse set of clients to assess all aspects of their operations. Our integrated practices and effective delivery model result in seamless execution and performance excellence. We understand that successful strategic planning is at the core of optimum performance and growth. Our ability to consistently drive project success, achieve prominent levels of client satisfaction and earn repeat client engagement stems from our organizational philosophy. The model allows us to access a dynamic pool of expert resources, which are selected and assigned based on the specific needs of each client.

The CRA Team is committed to being your partner of choice by maintaining an elevated level of focus, diligence, and a purposeful approach to deliver high-quality results. This document outlines our proposed approach for collaborating with the Children Trust of Alachua County's (Children's Trust) leadership and its board members to conduct a thorough assessment of the current strategic plan. This includes evaluating progress toward existing goals, determining the continued relevance of those goals and identifying necessary adjustments based on evolving organizational priorities and external conditions. Based on findings, we will facilitate the development of an updated strategic plan that is responsive to current realities and positions the organization for future success.

### **SCOPE OF SERVICES**

Our team will collaborate with the Children's Trust to update the current Strategic Plan, considering the goals, objective elements, and sample measurements of success. The updated plan will derive through the facilitation of a Board Workshop on Thursday, July 17, 2025. In preparation for the Workshop, a customized working session curriculum based on information and feedback received from the leadership of the Children's Trust, its staff, and its Board Members will be developed. Feedback from Board Members and staff will be gained through an interview process with specifically designed questions that allow expressions on direction, priority issues, funding, resources and more. The start of a SWOT analysis will derive from information received through this process and will expand upon during the planning session.

### **PROJECT APPROACH**

The following is the preliminary vision of the project activities which we believe will yield maximum impact for the Children's Trust and their stakeholders:

- Communication with the Children's Trust CEO, Board Chair, and appropriate staff to share the proposed process and gain needed input.
- Collaborate with the leadership to ensure all Board member participants understand the purpose, goals, and objectives of the project.
- Review pertinent information related to current plans and objectives to better understand current policies and practices.
- In collaboration with the Children's Trust Leadership, develop an interview guide and participant list for member interviews.
- Schedule a telephone or virtual interview with each Board Member.
- Conduct interviews with all member representatives, and any other identified interviewees critical a successful process.
- Compile, Synthesize and analyze the results of the interview data.
- Incorporate interview feedback to develop a customized curriculum framework to guide the facilitated work session, focused discussion, and related activities.
- Facilitate strategic planning discussions and activities during the scheduled Board Workshop.
- Synthesize the data and output from the Workshop to prepare a draft updated Strategic Plan.
- Review and clarify initial findings with the Children's Trust CEO and Board Chair, as appropriate.
- Collaborate with Leadership to fine-tune the content and develop the final updated Strategic Plan for approval.

### **PROFESSIONAL SERVICES FEE & INVOICING SCHEDULE**

The total Professional Services fee for the project is \$15,000 which covers all planning and coordination activities, participant interviews, curriculum design, retreat materials, printing, and supplies. All travel-related expenses are included in this fixed fee. Any additional services will be provided at \$180.00/hour.

The Children's Trust of Alachua County will provide a workshop/meeting space, refreshments and all audio-visual equipment and support.

Upon acceptance of this agreement, \$7,500 will be invoiced for payment and the final invoice of \$7,500 will be invoiced at project completion.