



Proposal For:

**Crosslake Community School
Strategic Plan**

Contact Information:

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Owner

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Dear Holly and the Board of Directors,

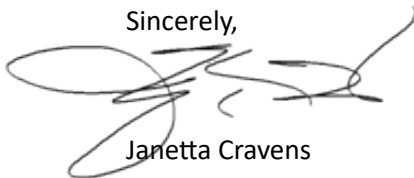
I am excited to be submitting a proposal for a strategic plan for Crosslake Community School.

The purpose and mission of Crosslake Community School is important to me both personally and professionally. As the daughter of an educator the values formed as a young person to take pride in your work, to take time to construct, and to devote yourself to the task at hand was forged by learning experiences. I recently developed a strategic plan for a voucher-based school, Cristo Rey, which also had a unique funding model. Each strategic plan we create is unique and custom to the organization for which it was intended, and often includes governance and management best-practices that is tailored to the individual needs of the nonprofit.

Should you chose to work with me, you will find that I am adaptable, approachable, and committed — often going above and beyond what is described in the scope of work in order to ensure that the deliverables are thorough and complete. I have a personal devotion to sustainability and community service. My firm, CoSpire, works with nonprofit organizations across the United States, but when I have an opportunity to work with organizations that share my values and proximity, it is especially meaningful. I teach and facilitate often in virtual settings and am comfortable in that environment, but I have spent a good amount of time in Minnesota and my in-laws are in the state that shares the other shore with Lake Superior, Michigan. I would also be happy to be in person for the parts of our engagement that would most benefit from being together in person.

Lastly, I would like for the review committee to know that my proposals are intended to be starting places for negotiation and conversation. What is outlined here is a recommendation based on my understanding of the RFP and suggestions based on my experience. However; each aspect of it may be adjusted, even eliminated, in order to work within the framework of what you need and the budget that suits your expectations. I work on a flat rate basis in order to equitable to the nonprofits of many sizes and operating budgets with which I work, which also allows a certain amount of flexibility to shift efforts in order to meet an organization's needs without sacrificing quality in the delivery of the services.

Sincerely,



Janetta Cravens
Owner, CoSpire, LLC

PROPOSAL

ABOUT COSPIRE: ORGANIZATIONAL OVERVIEW

CoSpire Consulting exists to help other organizations be successful. Our mission is to *build community within organizations by strengthening leaders and defining goals*. We work with organizations that seek excellent governance and customized strategies.

We are inclusive forward-thinking strategists who believe in the importance of mobilizing people to make progress on hard problems for a more just world. We have a passion for innovation and human progress through attentive team development. We specialize in:

- Strategic planning and action planning to align values with direction;
- Governance and business models for national and international organizations;
- CEO and Senior Leader support, including coaching, onboarding and annual evaluations;
- Board Chair and CEO partnership

Our Core Values:

Community — we are stronger together and seek to uncover our common-unity; honor the uniqueness of each group with which we work, support the diversity and inclusion that is essential in connected our shared humanity;

Creativity — facilitation for new ways forward; hold paradox of possibilities together for development of third-ways; appreciate the sacred messy work of creating new; give hospitality to the tension between truth and hope;

Courage — brave spaces for honesty, authenticity, and care are needed to narrow the gap between identifying problems and finding solutions; boldness and bravery are companions in courage;

Compassion — we are partners in becoming, “co-spire” together in what is possible; recognize that the alleviation of suffering in any system is necessary for positive growth and community; all people matter in the process and loving kindness fosters truth.

Staffing Structure:

CoSpire has one full-time employee, its founder, Janetta Cravens, and it utilizes a broad network of consultants on certain projects to cover a wide variety of expertise that may be needed, such as: human resources, industrial psychology, fundraising, and more.

ABOUT OUR FOUNDER



JANETTA CRAVENS
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By profession, Janetta is a 3-D strategist, researcher, and systems thinker known for creating high performance with mindful sustainable leadership for global change. As a consultant she has worked with nonprofit organizations and civic groups, entertainment industry professionals, for-profit businesses, and academic institutions. With more than twenty years in the nonprofit sector, and over ten years as a consultant, she works to mobilize outcome based change for a more just world. She coaches leaders to create sustainable growth by balancing leadership styles that model honesty and transparency while driving for results and impact.

She is a global executive coach of more than 400 people and has managed P&L budgets of \$2.4 million. She is a BoardSource certified trained consultant in board governance, and a licensed consultant with the Standards for Excellence program, the nation's leading resource in nonprofit ethics and sustainable practices. She served two terms as a member of the Standards for Excellence Council and member of the Diversity and Equity Task Force. She has received her Certificate in Fundraising Management (CFRM) from the Lily School of Philanthropy. She holds a post-graduate fellowship in Organizational Design and Development from the Hollifield Leadership Institute in North Carolina, a Masters Degree in Ecumenical Theology from the University of Geneva, Geneva Switzerland, a Masters of Divinity from Vanderbilt University, Nashville, Tennessee, and a Bachelors of Music from Phillips University, Enid, Oklahoma.

RELEVANT EXPERIENCE

Janetta Cravens has worked with other nonprofit organizations with unique educational models. Most recently a strategic plan for **Cristo Rey**, a national private school model that pairs corporate work opportunities with a student's educational experience, providing both a non-traditional but essential education for student's development, as well as a creative funding model. She has led board governance training with clients like **Goodwill Industries, Heifer International, and the Christy Lynn Mitchell Foundation**, and worked with nonprofit organizations in suburban areas such as the **Price Tower Plaza and Museum**, in Bartlesville, Oklahoma which is Frank Lloyd Wrights' only hotel.

SCOPE OF WORK

Strategic Plan

Strategic planning is essential to a nonprofit organization because it aligns direction with the appropriate action to navigate present realities with intention. A successful strategic plan is a marriage between a constructive facilitation process that appropriately addresses current realities and creatively addresses options to mold a future direction, and a plan for implementation that is practical, doable, and addressable by both the board of directors and senior management.

Strategic Planning Sustainability Model:

Our model for a strategic plan is to situate the strategic plan appropriately within the organization's lifecycle stage and structure the plan using the four facets of sustainability. Sustainability is defined as the length of an organization's durability to fulfill its mission. Using a rock cairn as a model, nonprofit sustainability is a mix of effort, intention, priority, and understanding when and where to devote energy. The strategic plan applies this model to inform the projected future of the organization and addresses the next stage of development which is essential for a high-functioning and impactful nonprofit.



Public Relations — How the organization relates to the public, including donors and communications, and advocates for its mission with stakeholders.

Operations — How processes are organized, including financial reporting, and the administrative systems that create reliability.

Leadership — The people who manage the agency to effectively achieve the mission including the development of the board of directors, chief executive and other staff, and key volunteers.

Mission and Programs — The organizations' purpose and method of delivering programs which evolves over time but must remain the focal point.

Most strategic plans take approximately 3 months to implement if all aspects including meeting facilitation stay on schedule. The organization will create the group that will be responsible for working with the consultant on developing the plan. The group could consist of the full board and all senior leaders, or a smaller group or committee comprised of representatives from the board and management.

Facilitated sessions are engaging, informative, and weave in governance best-practices and management throughout the engagement.

Because the RFP did not specifically mention the need for surveys or additional data collection this was not included in the options below but could be added. Additionally, travel expenses have not included in the pricing listed.

Option 1 — Basic Strategic Plan — \$14,000**Timeline: 3 months**

1. CoSpire will facilitate a strategic planning process that consists of up to 20 hours of facilitation with the strategic planning group. The board will receive:
 - Facilitation process that can be divided into any combination that suits the organization's leadership. The most common selections are a full day retreat (6-8 hrs) with several follow up sessions that are 2-3 hours in length, or a series of 5, 3-4 hour sessions which can be in person or virtual or any combination of the two.
2. A written strategic plan that includes strategic pillars, objectives, and initiatives.
3. A 1 hour meeting with the executive director and/or board chair to review "the words" of the strategic plan before they are put into the final draft.
4. A 90 minute meeting with the strategic planning group to review the draft and make final changes.
5. An up to 1 hour presentation to the board of directors of the final strategic plan, which can be delivered virtually or in person.

Option 2 — Strategic Plan With Business Development and Implementation Tool — \$25,200**Timeline: 3.5 - 4 months**

In addition to everything in Option 1, CoSpire will review aspects of the business model and design an implementation tool that provides clarity on tracking and implementing the strategic plan throughout its lifespan.

1. Details for implementing the strategic plan such as suggested timelines and projects which can be used by the board and management to keep progress with the plan.
2. Additional 3-4 hour facilitated session with planning group to identify additional important strategic planning items like metrics for measuring success and timelines.
3. Up to additional 6 hours to review current and projected business model, such as financial stability, fundraising plans, communication strategies, and other operational items that may be implicated in the strategic plan and discuss items with senior leaders and/or board members as needed.
4. Up to 4 hours additional time with Executive and/or Board Chair to outline additional detail for the strategic plan.
5. Dashboard tools that can be used by the board to keep progress with the plan.

Option 3 — Strategic Plan, Implementation Tool, and Implementation Coaching — \$35,000

Timeline: 3-4 months for strategic plan development, coaching for life of plan

In addition to everything in Option 2, CoSpire will provide up to 10 hours of additional supportive coaching to the board and executive director *for each year* of the 3 year-duration of the plan.

- Coaching sessions can be used to review success and challenges encountered during implementation of the plan, applied to staff, committees or the full board, review of business models or other aspects that may affect sustainability while the strategic plan is being implemented, and coaching for organizational changes such as restructures and staffing or board changes that may result from the strategic plan.
- Coaching can be delivered in person or virtually and include training sessions on items that support the leadership of the organization and areas critical to board governance.

SUGGESTED TIMELINE

Using the model of the **basic strategic plan** a suggested timeline would be:

April 2023: Onsite engagement with board of directors. Initiation of the strategic planning process in a facilitated 6-8 hour session.

May 2023: Follow up sessions for strategic plan conducted virtually with planning group. Meeting with Executive and/or Board chair to review “the words” of the strategic plan.

June 2023: Final draft of strategic plan sent to planning group and full board.

REFERENCES

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