


TO: Juvenile Welfare Board Members

FROM: James E. Mills, Executive Director 
Browning Spence, Director, Community Planning and Research HBS

Requested Action

The Board is requested to approve engaging a consultant to assist with the update to the Strategic Plan.

Options

1. Allocate up to \$19,500 to Analytica for consultation in the Strategic Plan update.
2. Do not engage a consultant.
3. Any other action the Board deems appropriate.

Recommended Action

Allocate up to \$19,500 to Analytica for consultation in the Strategic Plan update.

Source of JWB Funds

JWB Administrative Budget

Fiscal Impact

The FY 01-02 JWB Administration-Community Planning and Research budget will be reduced by \$1,875, and the FY 02-03 Budget will be reduced by \$17,625.

Narrative

The action plan for the JWB Strategic Plan was adopted in 1998, and the Board has determined that the Plan needs to be updated in the 02-03 fiscal year. During Board discussion of the Strategic Plan update, staff was directed to determine if the consultant who assisted with the development of the Strategic Plan would be available to assist with the Plan update.

Herb Marlowe of Analytica was contacted and has submitted a proposal for assisting with the update of the Plan. (Proposal Attached) Staff has twice met with Mr. Marlowe to identify work components and a timeline, keeping in mind the Board directive to avoid formal meetings and to complete the task in a short period of time in order to have the update completed prior to the next budget cycle.

Mr. Marlowe has proposed a four phase process to be completed by January:

- Environmental Scan
- Concept and Theme Testing
- Strategic Plan Update
- Strategic Plan approval.

Input will be sought through a series of individual meetings between the consultant and Board members, an agency survey, and meetings with staff, providers and the Community Councils. One Board workshop is proposed to discuss findings and finalize the update.

Given the amount of work required for the update and the compressed time frame, the amount requested is reasonable. Mr. Marlowe is very familiar with JWB and Pinellas County as he has worked with other county human service organizations. The Board was very pleased with the quality of work by Mr. Marlowe during the original plan development process.

Analytica

POB 998 (U.S. Mail)
26038 W. Newberry Rd (Ground)
Newberry, FL 32669

352 472 7171 Voice
352 472 5687 Fax
352 262 5222 Cell

HMarlowe@aol.com

August 29, 2002

Mr. Jim Mills
Executive Director
Juvenile Welfare Board
Pinellas Park, FL

Dear Mr. Mills:

I am pleased to submit this proposal to update the JWB Strategic Plan. The process I propose will complete the plan by January of 2003, including Board approval. Based on your guidance this approach will minimize formal meetings and concentrate on those elements of the existing plan where some new emphasis or shift in approach is needed.

The process I propose consists of four phases, which I describe below:

Phase 1: Environmental Scan: Identifying New Concepts & Themes to be incorporated into an Updated Strategic Plan

Purpose:

Identify Key Issues, Ideas, and Emerging Trends from various Community Perspectives that should be integrated into an Updated Strategic Plan

Process:

- Board member individual interviews
- Meetings with community groups
- Meeting with providers
- Staff workshop
- Management Team workshop
- Development of draft conceptual strategic plan

Product & Deliverable:

Concepts and Themes Report delineating issues, ideas and trends that could be incorporated into an updated Strategic Plan

Phase 2: Concept & Theme Testing

Purpose:

Determine which concepts and themes (ideas, issues and trends) should be incorporated into the Updated Strategic Plan

Process:

- Board member individual discussions
- Management Team Workshop
- Executive Director workday

Product & Deliverable:

First Draft Update of the Strategic Plan

Phase 3: Strategic Plan Update

Purpose:

Review, refine and finalize proposed updates to the Strategic Plan. In this phase we determine the implications of the new concepts and themes for JWB operations and how they can be implemented.

Process:

- Board member individual discussions
- Management Team Workshop
- Executive Director workday

Product & Deliverable:

Proposed Updated Strategic Plan for Board consideration

Phase 4: Strategic Plan Approval

Purpose:

Finalize Strategic Plan

Process:

- Board workshop

Product & Deliverable:

Approved Strategic Plan

Time Frame:

The time frame for the project is shown in the following GANTT chart

Phase:	Sept	Oct	Nov	Dec	Jan
Environmental Scan	█	█			
Concepts & Themes Integration		█	█		
Draft update to Strategic Plan			█	█	
Final Approval of Updated Strategic Plan					█

Fees:

Based on the above model I would propose the following fees:

- Phase 1: \$7,500
- Phase 2: \$6,000
- Phase 3: \$4,500
- Phase 4: \$1,500

Total: \$19,500.00

I have attached a resume and list of strategic planning projects for your background information. Please let me know if you need any further information and I will be pleased to provide it.

Cordially,

Herbert A. Marlowe, Jr.

HERBERT A. MARLOWE, Jr.

Dr. Herbert Marlowe is a specialist in organizational effectiveness. He works with associations, collaborations, foundations, family businesses, professional firms, local and regional governments, non-profit organizations, and public-private partnerships to enhance their effectiveness and impact. He received his Ph.D. from the University of Florida, where he specialized in process facilitation and strategy in the areas of organizational design, development and effectiveness.

Prior to establishing a full time consulting practice, he served as an organizational development consultant for the U.S. Navy, the University of South Florida and the University of Florida. He was a member of the team that developed the Navy's strategy for continuous organizational improvement and cultural diversity programs. At the University of South Florida he was a member of the team charged with developing and implementing a new strategy and organizational approach for mental health services in the state.

While serving at the University of Florida he first joined a Center focusing on the state's environmental issues. While there he managed a number of research projects addressing strategies for natural resource protection and management. Upon joining another Institute in the University, he was lead consultant to a water utility developing and managing strategies for extensive growth and organizational change.

Upon completion of this last project, he established Analytica in 1991 as a full time consulting practice providing strategic planning and organizational effectiveness services. As the founding principal of Analytica, he has been instrumental in implementing the business strategy of the firm and leading the marketing effort. He serves as project manager responsible for overall management of the firm's projects. These projects include services in internal and collaborative organizational design, strategic planning and management, including strategic budgeting, community visioning, conflict resolution, impact evaluation and organizational effectiveness research. The firm works with a wide range of clients covering the private, public and non-profit sectors. Client's missions include economic development, downtown redevelopment, tourism development, water policy, land use, environmental protection, public facility siting, race relations, public health, human services and criminal justice. Dr. Marlowe has extensive experience working on controversial and complex public policy issues with both policy and citizens groups.

Dr. Marlowe published extensively during his academic career and he has continued to publish scientific and professional articles. He has published in journals such as: State and Local Government Review, Evaluation Review, Public Productivity and Management Review, the Journal of the American Water Works Association, the Journal of Educational Psychology, the Public Manager, Journal of Managerial Psychology, Hospital and Community Psychiatry, the Journal of Correctional Psychology. In addition he has edited a number of books, technical reports and book chapters.

ANALYTICA

FIRM OVERVIEW & PROJECT EXPERIENCE

Firm Description

Analytica is a professional strategy firm that offers a full range of facilitation and consulting services for effective strategy development and deployment. The firm joins with other specialists to provide highly focused consulting services to organizations and communities seeking effective strategies for the future. We focus on:

- **Vision Creation.** The development of a clear picture of the preferred future for your community or organization
- **Strategy Development.** The articulation of viable and comprehensive pathways to the preferred future.
- **Strategy Deployment.** The design of systems, structures, policies, procedures and assessments that will effectively implement and manage strategies.

Qualifications

Analytica is a highly experienced strategy development and process facilitation firm. We have worked with non-profits of various sizes, cities, counties, water management districts, school boards and state agencies on a wide range of issues. Table 1.1 provides a selected listing of our clients. Table 1.2 provides a list of issues or topics that we have assisted our clients to effectively address. Table 3 provides a listing of strategic planning projects completed for the health and human services sector. This work has given us a comprehensive and in-depth understanding of public policy issues facing communities along with a particular appreciation for the challenges facing the health and human services sector.

Facilitation. Analytica's founder, Dr. Herbert Marlowe, completed his Ph.D. as a specialist in facilitation services. He has created a number of specialized techniques to facilitation group work and regularly publishes in professional and academic journals. He is a leader in the use of qualitative and quantitative data to facilitate group decision-making.

Visioning. We have facilitated a number of visioning processes for large and small organizations as well as communities ranging from very small rural communities to large urban counties. Again, we have created a number of tools and techniques to ensure the visioning processes are both creative and effective.

Strategic Planning. We have extensive experience in strategic plan development for a wide range of clients. Selected clients are listed in another section of this response.

Strategy Deployment. Given our extensive practical experience as organizational development consultants, we are highly skilled in instituting systems and processes to implement strategy. We offer a wide range of services to assist our clients to improve the performance of their organizations. Examples are listed below.

Organizational assessment and diagnosis. We design and conduct internal and stakeholder written and phone surveys, focus groups, interviews as well as performance reviews and business process mapping to assist organizations to understand both performance and internal operations issues. As examples of our work in this area we have done and/or conducting:

- An examination of small business vendor satisfaction with purchasing and procurement practices;
- An examination of the operational issues involved in the implementation of a tele-medicine system;
- An examination of business operations
- Compensation and classification studies
- Staffing standard studies.

Governance and Policy Leadership. We assist organizations in setting clear policy directions via the use of new governance models such as Policy Leadership and the use of tools such as goal and results setting, boundary establishment, policy work plans and strategy monitoring. As examples of our work in this area we have done and/or conducting:

- Development and implementation of Policy Leadership in the non-profit sector
- Annual goal setting retreat for a wide variety of clients
- Policy Framework Board retreats

Business Process Re-Engineering. One key internal strategy to improve organizational performance is to re-engineer key business processes. We have done a number of projects in this area:

- A re-engineering of a budgeting process to reflect strategic priorities
- Creation of a new approach to permitting which was labeled performance permitting
- Internal Human Resource development processes

Reward System Design. We operate on the principle that the behavior you get in an organization is the behavior you are rewarding, intentionally or not. To ensure desired performance we have worked on the following projects:

- Design of a performance based step system model
- A number of compensation and classification systems in which we provide recommendations for new reward systems

Internal Communication Systems. Internal and external communications represent a perennial organizational challenge. We have assisted our clients to address this strategy in a variety of ways:

- The creation of periodic communication assessments to chart performance
- Development of new public communication strategies
- The development of new forums for internal communication

Organizational Culture Change. For any organization, the move to a higher level of performance ultimately requires an examination of organizational culture, i.e. the underlying values and norms that influence behavior. In this area we provide a number of services:

- Design and conduct of written organizational culture surveys;
- Focus groups and interviews
- Analysis of key culture change opportunities

Conflict Resolution Services. We assist clients to resolve major conflicts that can hinder organizational performance. While some of these are internal, most are inter-agency in nature. Our work in this area has included:

- Facilitation of Water Supply Issues .
- Facilitation of a multi-stakeholder process to resolve land use issues
- In addition to these external issues, we have worked with clients on resolving a number of internal organizational conflicts.

Mergers. We have assisted a number of clients to determine if a merger would be in their best interest and if so, to develop strategies to successfully implement the merger.

Leadership and Organizational Training. Finally, we offer a variety of training services to assist clients to create higher value added. Among our courses and workshops are:

- Team based organizations: When should you use this form?
- Policy Leadership: New Roles for the Board and the Executive
- Getting Work Done through Teams: The Leader as Facilitator
- Managing Conflict in the Workplace
- Working with Board Members: Do's and Don'ts
- Non-Verbals: Reading the Unsaid Message
- Decision Mapping: Sailing through complex waters
- Decision Making Styles
- Organizational Design: Fostering Higher Performance

Experience

- The firm is very familiar with the issues facing the public and non-profit communities. Our team has extensive experience with, public sector policy and funding, human service organizations, foundations, community based organizations and economic development organizations. As shown in Table 1.3, we have extensive experience in the development of strategic plans for the health and human service sectors.

Table 1.1. Selected Client List

We have provided the above categories of service to clients such as:

- Alachua County
- Allegany Franciscan Foundation
- Baker County
- Belle Glade
- Brevard County
- Broward County
- Charlotte County
- Children's Board of Hillsborough County
- Children's Services Council, Palm Beach County
- City of Sarasota
- Community Foundation of Palm Beach & Martin Counties
- Daytona Beach
- Deland
- Family Counseling Services of Miami
- Family Resources, Inc, St. Petersburg
- Family Services Center, Clearwater
- Fort Walton Beach
- Florida Department of Health
- Florida Department of Juvenile Justice
- Gadsden County
- Glades Community Development Corp
- Glades Initiative
- Halifax Health Care District
- Hamilton County
- House Next Door, Deland
- Jacksonville Electric Authority
- Juvenile Welfare Board of Pinellas County
- Lakeland
- Lake Wales
- Lee County
- Leon County
- Madison County
- Manasota Water Authority
- Martin County
- Monroe County
- Non-Profit Resource Institute, W. Palm Beach
- Ormond Beach
- Osceola County
- Palm Beach County
- Palm Beach County Chapter, Red Cross
- Palm Beach Solid Waste Authority
- Palm Coast
- Polk County
- Ponce Inlet
- Resource Depot, W. Palm Beach
- St. Johns River Water Management District
- St. Lucie County
- St. Petersburg
- Sarasota County
- School Board of Palm Beach County
- Shands Hospital
- Springfield MA Red Cross
- South Florida Water Management District
- Southeast Volusia Hospital Authority
- Southwest Florida Water Management District
- St. Mary's Foundation of Palm Beach County
- Springfield, Mass Red Cross Chapter
- Suwannee County
- Tallahassee
- Tampa Bay Water Coordinating Council
- Toward a More Perfect Union, W. Palm Beach
- United Way of Hillsborough County
- United Way of Pinellas County
- Volusia County
- Wakulla County
- Walton County
- Water Alliance, Volusia County
- West Volusia Hospital Authority
- Winter Haven

Table 1.2. Topics for which Facilitation & Strategy Development Services have been provided

- Agriculture & Aquaculture
 - Budgets and Financing
 - Children Services
 - Criminal Justice
 - Economic Development
 - Environmental Protection
 - Health Care
 - Human & Social Services
 - Inter-governmental Relations
 - Land Use
 - Library Services
 - Neighborhood Plans
 - Public Facility Siting
 - Public Infrastructure
 - Race Relations
 - Recreation
 - Transportation
 - Water Management
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Table 1.3. Health & Human Service Strategic Planning Projects

Charleston Educational Alliance, Charleston, SC
Children's Services Council of Palm Beach County, W. Palm Beach, FL
Glades Initiative
Family Counseling Services, Miami, FL
Family Resources, St. Petersburg, FL
Florida Association of Counties, Tallahassee, FL
Florida Redevelopment Association, Tallahassee, FL
Leadership Palm Beach County, W. Palm Beach, FL
Resource Depot, W. Palm Beach, FL
The Allegany Franciscan Foundation, Clearwater, FL
The ARC, W. Palm Beach, FL
The Children's Board of Hillsborough County, Tampa, FL
The Community Action Agency, Bartow, FL
The Community Foundation for Palm Beach & Martin Counties, W. Palm Beach, FL
The Education Foundation of Palm Beach County, W. Palm Beach, FL
The Evangelical Lutheran Church, Chicago, IL
The House Next Door, Deland, FL
The Juvenile Welfare Board of Pinellas County, Pinellas Park, FL
The Literacy Council of Palm Beach County, W. Palm Beach, FL
The Non-Profit Resource Institute, W. Palm Beach, FL
The Palm Beach County Red Cross Chapter, W. Palm Beach, FL
The Pioneer Valley Red Cross Chapter, Springfield, Mass
The Republican Party of Palm Beach County, W. Palm Beach, FL
The United Way of Hillsborough County, Tampa, FL
The United Way of Pinellas County, St. Petersburg, FL
The Western Mental Health Center, Belle Glade, FL
Toward a More Perfect Union, W. Palm Beach, FL
