



Proposal in Response to Strategic Planning and Facilitation RFQ

Capitol Region Council of Governments  
January 5, 2023

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# GROSSMAN SOLUTIONS

January 5, 2023

Elizabeth Sanderson  
Capitol Region Council of Governments241  
Main Street  
Hartford, CT 06106-5310Dear

Ms. Sanderson,

Thank you for the opportunity to present this proposal to provide Strategic Planning and Facilitation services for Capitol Region Council of Governments. We are excited to submit our proposal to help CRCOG assess your mission, set new goals, and develop strategies to achieve them over the next three to five years.

When we say, “We help leaders lead” we mean it. Our strength lies in our wide range of skills and our ability to help our clients solve their most vexing challenges. We are expert facilitators and strategists deeply rooted in the public life of the Capitol region. We have a successful track record in leading meaningful conversations and processes with citizens, elected officials, advocates and other stakeholders, analyzing what we’ve learned to design smart strategy and planning, and creating collaborative environments that encourage feedback and help establish buy-in.

As CRCOG defines the next strategic plan, we look forward to seeing the many positive achievements for our region.

We look forward to being part of your process and goals.

Sincerely,

Evelyn Mantilla  
Managing Director

## **Proposal**

### **Strategic Planning and Facilitation**

As the Capitol Region recovers from the challenges of the COVID pandemic, it is clear to us that its future is closely tied to our towns' ability to collaborate on regional priorities. Saving tax dollars by improving governmental efficiencies, supporting and improving efficient transportation systems, and establishing effective economic development efforts are all part of what will make the region successful. Additionally, by raising Hartford's profile as our capital city and the economic, social and cultural center of the region, we are able to lift the fortunes of all of our towns. To be successful, these efforts require the setting of a strong strategic direction. CRCOG must look forward to a new horizon and examine its vision, mission and goals, as well as the strategies that will propel its success in achieving its aims.

The implementation of a new vision will be dependent on a carefully crafted strategic plan developed through a collaborative process and engagement effort that will represent the voices of CRCOG's stakeholders. Along the way, we will facilitate many conversations that will gather the input of a wide range of people who have an interest in CRCOG's success for the residents of our region.

As you embark on this next step, Grossman Solutions is uniquely situated to help CRCOG pursue this exploration. Grossman Solutions works at the intersection of people, politics and policy. We help our clients solve their most challenging problems, build their capacity and expand their reach with our collaborative hands-on approach. We draw our strength from our multicultural team and our commitment to racial, social and economic justice.

#### **A. Project Understanding / Our Approach**

Our work with CRCOG will start with establishing a close partnership with the Executive Director and others you choose. We are natural collaborators who do our best work as part of a team. Our goal is to embed ourselves with you, understand your work (and the way you work) while providing an external perspective.

We will begin our engagement with an intake meeting with the Executive Director and assigned leaders to set up our work plan. We will use this time to understand your mission and goals, and the way you approach achieving them. We want to learn about the progress you've made, where the work is unfinished and how your priorities have changed. We will also ask you to tell us about your stakeholders and learn what you want us to cover in our interviews with them.

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This will help us draft our stakeholder interview questionnaire, which we will ask you to provide feedback on before we begin our conversations.

On an ongoing basis, we will hold scheduled weekly meetings to refine our work, to review our progress and collaborate on designing the next steps of this process. At every step, we will deliver draft work products and present them to the leadership team for consideration. And throughout our engagement, we will seek your feedback informally.

## **Our Work Plan**

### The Final Product

When we finish our work with CRCOG, the organization will have a renewed and vibrant Mission Statement to guide its work in the future. The Board and staff will have been a significant part of the process and feel even more invested in the work. The organizational leaders will have played a guiding role in developing the future work of the organization.

CRCOG will have considered robust organizational strategies to achieve the mission and weighed each one on its strengths and weaknesses.

Our final strategic planning document will delineate:

- Vision and Mission
- Organizational Values
- Strategic priorities and initiatives
- Goals, objectives and tactics to drive toward the strategic priorities
- Metrics

### Planning

After our initial intake meetings, we will embark on a purposeful planning period. We believe planning is an iterative process that uses each step to improve the potential of the next step. We will use our collaborative partnership with CRCOG leaders to get the most out of the staff and board processes. We will use our planning meetings to give shape to our workplan.

### Facilitated Retreat

In collaboration with the project leadership, we will plan a staff retreat to examine the connection from mission to goals to strategy and implementation. We will seek to find areas where participants agree and where there are differences of opinion. We will foster a dialogue about those differences of opinion if the areas of disagreement are crucial to mission success.

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We will write questionnaires to guide our facilitation of each meeting. The questions will explore the current landscape in our region, the work that needs to be done, organizational mission and goals, and will begin tackling strategic implications and concerns.

After the retreat, we will deliver a comprehensive report of our findings. These findings will include a review of what we heard and will be organized and delivered in a way that anticipates the revision (or development) of a new Vision and Mission statement.

### Vision, Mission, Values and Goals

The staff retreat will include facilitated deliberations on what the Vision, Mission, Values and Goals statements should be.

After discussion and editing and with your approval, we will develop potential strategies for your consideration, again, using the input we receive from the staff. We will develop each strategy weighing a range of factors, including time, cost, COVID, and various other externalities CRCOG may encounter. The strategies that are developed here will be prepared into a document to be presented to the board and staff for their final feedback.

### Policy Board Planning Sessions

The Board planning process will also be conducted in a collaborative manner. All meetings and their agendas and materials will be planned with the project leadership.

We recommend the following:

1. Presentation of the retreat results. We will present our findings to the board in writing and will discuss these results either in person or by zoom.
2. The above results will include Vision, Mission and Values statements. At the end of this meeting, we will have a Board-approved Vision, Mission and Values statements.

*An effective **vision statement** looks into the future but is written in the present tense and describes an outcome, the best outcome we can achieve. The final vision statement must evoke emotion and build a common picture in peoples' minds.*

*The **mission statement** will build on the vision statement by describing what CRCOG must do to achieve its vision. It must also describe for others why the organization exists and what makes it different.*

*CRCOG must be guided by its **value statements**, in which its principles are clearly stated using accessible language. Values such as inclusiveness and a commitment to diversity in all of its forms will help CRCOG be true to its goals of equity across the board.*

Additional Stakeholders Feedback Services

If CRCOG leadership decides that additional feedback is needed from stakeholders, Grossman Solutions will gladly conduct stakeholder interviews, for an additional fee to be negotiated at that time.

Timeframe

We expect that this project plan will be completed in a span of eight months.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Intake meetings								
Planning								
Facilitated staff retreat								
Develop strategies / tactics								
Board presentation								
Finalize Strategic Plan document								

**B. Relevant Experience and Qualifications**

Our Commitment to Racial Equity and Anti-Racism

We are deeply committed to equity, diversity, inclusion and justice, and we know this makes Grossman Solutions strong. From our beginning, we have committed ourselves to thinking about our country, our community, our work and our workplace through this lens. As individuals and as a team, we lean into the conversations and work that deepen our understanding about race, racism, and implicit bias.

We are a multicultural, inclusive and anti-racist business.

We partner with our clients to help advance equity in their work. We help them run inclusive processes that reflect the organizations they are trying to be.

On our consulting side, we work with advocates, political organizers and labor unions to build power for their constituencies and members. Our clients range from the AARP to 1199SEIU United Healthcare East and the New York City Council of Carpenters. Each of them and many others are

grappling with race and equity in what they do, their goals, how they consider their histories and traditions, how they develop their leaders and staff, and how they engage their diversifying memberships. We help them bring new voices to their work and think about value, growth and opportunity that comes with tackling these issues.

In our search business, we have successfully identified, recruited and placed talented people of color in executive roles for fourteen years, and through our stakeholder processes we have helped our clients think about equity, diversity and inclusion from both a hiring and programmatic perspective.

Through our Connecticut work – whether for Access Health CT, Get Vaccinated CT or election campaigns -- we've developed a keen knowledge and sensitivity to our state's glaring inequities. We engage residents, influencers and stakeholders in the towns and cities where most Connecticut people of color live - in conferences, public meetings, events, and at their doors. We gather information and feedback to share with our clients to improve their performance.

This is what sets us apart!

### **Our Project Team**

Our work with CRCOG will be led by **Evelyn Mantilla, Managing Director**. Evelyn is a highly experienced facilitator and project manager. She will be the main facilitator for the staff retreat and other feedback meetings. Most recently she has been in charge of implementing a plan of outreach and engagement for the CT Office of Health Strategy (OHS), which includes managing and facilitating many stakeholder “listening sessions” (focus groups). In this capacity, she has successfully garnered feedback for the organization that ultimately gives direction to many of OHS' efforts in subjects such as Primary Care Reform and Behavioral Health strategies.

Evelyn Mantilla is a self-made leader with decades of experience across a wide array of political, business, and social circles. As a member of the Connecticut General Assembly for ten years representing one of the state's lowest income districts, Evelyn served her constituents as a strong communicator, mediator, and effective coalition builder. Evelyn is an expert on the issues of health equity and the impact of race and economics on access to healthcare. Evelyn is fully bilingual in English and Spanish.

**Adry Sotolongo, Senior Associate**, will assist as Project Manager. Adry has over twelve years of professional experience in public affairs, specializing in strategic planning, advocacy campaigns, message development, event coordination, and press. At Grossman Solutions, her work has been focused on successfully organizing grassroots and outreach efforts for clients including Access Health CT, MGM, and 1199SEIU Healthcare Workers Union. Prior to working at Grossman Solutions, Adry served as Deputy Advisor to the Governor of Puerto Rico and worked as lead researcher at CRECE, a think-tank on economic development in Latino communities. Adry is fully bilingual in English and Spanish.

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The project will also be supported by one of Grossman Solutions' Associates who will assist in scheduling, writing and editing.

### References

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### C. Fee Proposal

Personnel	Est. Hours	Rate	Total
Evelyn Mantilla, Managing Director	110	145	15,950
Adry Sotolongo, Senior Associate	53	115	6,095
Associate	35	85	2,975
<b>TOTAL</b>			<b>\$25,020</b>