TRINDEL INSURANCE FUND

STRATEGIC PLANNING 2017

Preliminary Proposal

I. Option 1: 1.5 day Strategic Session

- Includes:
  - *Collaborative Design of session with ED or Steering Team*
  - *Conduct 1.5 day session to:*
    - *Assess Organization*
    - *Develop and Set 3 year Vision and Goals*
    - *Develop and Set Strategies to support goals*
  - *Write up of Meeting Notes and Plan*
- Benefits:
  - *Least Expensive Option*
- Consultant Fees $10,000 Plus Expenses

Address: 315 Meigs Rd. Suite A270
Santa Barbara, CA 93109

Phone: 707-825-8500

Website: insightandstrategies.com
Email: insight@insightandstrategies.com

II. Option 2: 1.5 Day Session plus a Senior Staff Assessment

- Includes:
  - *3 Hour SWOT Session with Staff in I & S Arcata office in June 2017*
  - *Feedback Synthesis and Presentation*
  - *Collaborative Design of session with ED or Steering Team*
  - *Conduct 1.5 day session to:*
    - *Assess organization including Presentation of Staff Assessment*
    - *Develop and Set 3 year Vision and Goals*
    - *Develop and Set Strategies to support goals*
  - *Write up of Meeting Notes and Plan*
- Benefits:
  - *Gives Board the Senior Staff input into Assessment*
  - *Meeting is better customized to address organizational priorities*
- Consultant Fees $13,000 Plus Expenses

III. Option 3: 1.5 day Strategic Session plus Board and Staff Assessment Survey

- Includes:
  - *Brief Qualitative Assessment Survey of Board and Staff prior to session*
  - *Feedback Presentation from Survey*
  - *Collaborative Design of session with ED or Steering Team*
  - *Conduct 1.5 day session to:*
    - *Assess organization including Presentation of Survey Feedback*
    - *Develop and Set 3 year Vision and Goals*
    - *Develop and Set Strategies to support goals*
  - *Write up of Meeting Notes and Plan*
- Benefits:
  - *Allows all stakeholders to have input into assessment*
  - *Meeting better Customized to meet Board Members and Staff needs*
- Consultant Fees $14,000 Plus Expenses