

# Cover Letter

## Introduction

We respectfully submit the attached proposal for your review, and offer our deep appreciation for your consideration. These documents describe our interest, approach, qualifications and outcomes you can expect from partnering with us. We wish to convey how our dynamic abilities will empower your team by seamlessly organizing and managing all planning, coordination, and administrative activities for Colorado's Strategic Action Planning Group on Aging. Moreover, we hope our proposal shares how our team goes even further to exceed the needs of your Group and the remarkable people at the heart of this initiative, Colorado's citizens.

## About Us

Onward Innovation is a Colorado based service-disabled veteran owned small business focused on empowering teams such as yours to *Do Great Things* through effective, yet intuitive, people-centered solutions, strategies and leadership. We have extensive experience in healthcare, public health, process improvement, project management, and cross-functional team facilitation. Our unique abilities and engaging expertise drive over 98% of those we have been honored to partner with choosing us again, and we look forward to the possibility of adding you to that list.

## Our Interest

We embrace the need to prepare for the challenges *and opportunities* presented in this project. The imminent shift in population demographics will have a profound impact on the economy, communities, family dynamics, healthcare and numerous other facets of our society. We want to offer our support in creating a strategic plan that responds not only to these *challenges*, but also creates mechanisms to empower industry, establishes robust support infrastructures and ensures *positive outcomes for all*. Our interest has always been working with those who strive to improve the lives of others, and this project will again afford us that honor should we be chosen.

## Our Qualifications

In addition to our passion, we offer a broad set of qualifications should we have the opportunity to partner with you:

- In depth experience facilitating, supporting and leading complex initiatives in healthcare, local, state, and federal government
- Exceptional abilities working with cross-functional teams spanning multiple industries
- Documented process improvement, operations and project administration successes
- Demonstrated abilities to masterfully coordinate complex, multifarious activities
- History of developing and delivering engaging reports and materials for complex projects
- Solid reputation of being self-paced, professional, collaborative, and great to work with by individuals and teams across all levels and in all sectors
- Ability to successfully manage sub-contractor/sub-group activities and performance

- Successful Colorado owned small business, experienced and nimble to meet your needs
- Partnerships with healthcare and public health agencies throughout the state
- Constantly going the extra mile, without prompting, because it is the right thing to do

## Our Approach

Our approach allows the Planning Group to focus on their overarching vision, while we manage all the details needed to make this critical initiative a total success. For readability, we have generalized our activities into different tasks and phases that can be summarized as:

- **Kickoff:** Familiarizing ourselves with the Group to tailor our performance to your needs
- **Process Development:** Emplacing powerful mechanisms to maximize efficiency
- **Activity Facilitation:** Supporting, coordinating, and exceeding all Team needs
- **Task Management:** Managing contractor/group activities to support overall objectives
- **Fostering Partnerships:** Leveraging our engaging approach to foster Planning Group relationships and successes with agencies throughout the state
- **Reporting:** Creating and sharing compelling reports and materials for all Group needs
- **Continuation:** Developing a base of exceptional performance and solidifying the foundation for ongoing Aging Strategy success over the next several decades

What sets our company apart is our unique ability to tailor ourselves to meet the needs of your diverse group. Throughout this partnership, we will work *with you* to achieve the highest possible outcomes in caring for Colorado's citizens. We would be honored to support this valuable initiative, and understand the crucial role our team could play to that end.

## Conclusion

Our team is passionate about helping others succeed in everything they do. We believe our unique capabilities will drive your group and this project to achieve maximum success. More details on our approach and credentials are included in our proposal, and we are available for questions at your convenience. We would again like to thank you for your consideration, and look forward to the possibility of partnering with you in this important endeavor.

Signed,



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## The Project

One of the greatest obstacles for government and community support organizations is anticipating and responding to the rapidly evolving needs of citizens, such as increasing ‘aging’ populations in our communities. A demographic shift of this magnitude will have a broad and rippling effect on community organizations, government, industry, families, healthcare and of course the elderly themselves. In the nation’s workforce alone, the Pew Research Center and Social Security Administration both report approximately 10,000 seasoned professionals will retire from private industry each day over the next 20 years. This consequently increases utilization of community resources and support mechanisms, impacts the performance of private and public sectors, and does so all within a political environment of decreasing funding for ‘entitlement’ programs. Given this context, it is imperative that governments create dynamic strategies for the future needs of these remarkable *people* today.

The strategic planning activities associated with such a complex project span multiple industries and disciplines, and as such, the 23 members of the Colorado Strategic Planning Group on Aging will need expert support in the management of several supporting functionalities to be successful. We understand the role of our team, should we be selected, will be to support your Group through successful completion of all its activities as described in the RFP. This will include our expert management and facilitation of various activities, including but not limited to:



We embrace the scope and importance of the Group’s mission to meet our state’s needs by creating the first comprehensive strategy for Colorado’s aging citizens. But more importantly, we see how this initiative offers an opportunity not only to address obstacles, but also to drive *positive outcomes* for these respected populations within our communities.

## Our Approach

Our approach to this project is centered on expertly facilitating all administrative functions of your group. It is also uniquely designed to do so in such a way as to empower the committee while ensuring all activities drive the development of a robust strategic plan *and* its successful implementation throughout the state.

Throughout the work plan described below, we will personally manage and coordinate a wide variety of functions utilizing our impeccable attention to detail, excellent organizational and communication skills, and our unique abilities to help a wide array of people and teams be successful in all they do.

Our approach to exceeding your needs and expectations includes:

### *Project Kickoff: (1-2 weeks following contracting)*

We will first conduct an engaging kickoff for the project, with the purpose of getting to know both Group and individual needs. This will allow us to ensure the project's success by capturing the entire Group's preferences, goals, and structure. Key tasks in this phase will include:

1

Meet with group members to understand your needs, focuses, and how we can support each of them

2

Assess communication preferences including comfort with electronic, physical and other mechanisms as well as any existing tools

3

Use that information, and guidance from the group, to establish a common operating picture and processes for both strategic and tactical activities

4

Capture and address any existing concerns or needs from the group so we can proactively meet them

### *Process Development: (1-2 weeks following kickoff)*

Once we have captured an earnest understanding of the Group's needs, we will (in short order) create powerful yet intuitive mechanisms to drive efficiency and success into the whole project. Collaboration can be an easy and enjoyable process, and we will make it one for your Group through development and use of tools such as:

1

Powerful yet intuitive report templates and information management mechanisms for the collection, maintenance and reporting of all Group activities

2

Electronic communication and management systems such as virtual meeting applications, collaboration programs and document sharing tools

- 3 Meeting facilitation guides, schedules, administrative management systems, etc.
- 4 Sub-group and sub-contractor oversight and performance procedures, guidelines and mechanisms to merge data into a singular framework
- 5 Other communication and management mechanisms as determined by information gained from our kickoff event(s)

*Activity Facilitation: (Throughout)*

Using these dynamic tools and our understanding of the Group, we will employ our strong organizational and operational skills to facilitate all group, sub-group, sub-contractor and ancillary activities. We see our role in this ongoing activity as empowering the entire committee, and any other agencies, to exceed all tasks with ease. In order to ensure success, we will:

- 1 Plan, schedule, coordinate and facilitate meetings in a manner that aligns with the preferences of the Group
- 2 Guide Group functions and performance during meetings, sub committee activities, and ancillary events/tasks
- 3 Compile information before, during and after events to ensure it is available and usable by all parties
- 4 Disseminate information and reports to the Group in a clear and concise manner
- 5 Coordinate with local, state, and other organizations as needed
- 6 Oversee individual tasks and deliverables to support overall strategic and specific tactical objectives

*Task Management: (Throughout)*

Our role and philosophy on management is to empower and inspire people to succeed. In this contract, we see ourselves doing this not only through the oversight of business and sub-contractor activities, but also in supporting the Planning Group by guiding its activities over the next year. Our management style is enterprising, open and positive, and we have a demonstrated history of being approachable and easy to work with. We will use those distinctive abilities to successfully complete several activities, including:



- 1 Development and implementation of operational & administrative management systems to help the Group, sub-groups, sub-contractors and others exceed desired outcomes
- 2 On-boarding, coordination and guidance of external contractors, including the management of their activities and oversight of their performance/deliverables
- 3 Creation, dissemination and direction of schedules, task lists, and performance criteria both at a strategic and tactical level
- 4 Providing direction and guidance as needed to all partners to assure the project stays on time, at budget and ahead of performance expectations

*Fostering Partnerships: (Throughout)*

We can help the Group expand and partner with other agencies throughout the state and community. We believe collaboration is key to the Group creating an informed and integrative action plan with applicability for all of Colorado's citizens. Our activities in this section will include:

- 1 Design and support of outreach, informational and 'marketing' material to foster Group initiatives throughout the state
- 2 Communication and coordination with regional, local, and private organizations to gain their insights and support as it pertains to the Group's activities
- 3 Planning events and activities (if needed) outside the Denver area, coordinating with local public health, healthcare and other agencies

*Reporting: (At meetings, monthly, quarterly and to support final plan deliverable)*

Our goal is to simplify and streamline reporting capabilities to ensure we are conveying information in an efficient and useful manner. Based on the Group's preferences, we will tailor reports to be user-friendly, and make it easy to discern necessary information. We aim to create reports that meet the following criteria:

- 1 Concise and engaging, yet highly educational
- 2 Easy to follow and read with high applicability to the reader, policy makers, etc.
- 3 Influential in driving change and solidifying the Group's goals

*Continuation: (Throughout)*

While this specific project has a scheduled deadline of 31 December 2016, we fully realize the ultimate accomplishment of its *purpose* extends over the next several decades. As such we will, throughout the project, focus on helping the Group (and all other related parties) establish a strong foundation of success and performance. Because of its direct impact on so many people in our state, our goal is to ensure that this committee, and its long term goals and objectives, are highly successful. Our approach for supporting your lasting success in show in the following cycle:



Ultimately, the outcomes of this critical initiative is contingent upon the quality of its performance and activities. We know how important it is for Planning Group members to spend their time and efforts working towards the project's greater strategy and purpose; we understand the role of our project team to this end. By creating and spearheading the innovative and resourceful approach described above, we pave the way for your continued success well into the future. As a project team, we will continuously transition seamlessly between big picture scope and the more detailed aspects of the project, making it easy for the Group to focus on the task at hand.

We fully support Colorado's leadership in developing the nations' first comprehensive plan on aging, and we aim to empower you to succeed in that task.

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# The Colorado Strategic Action Planning Group on Aging

## Project Administration Services

Submitted in response to Request for Proposal dated: 11 September 2015



*Prepared Respectfully for Your Review by:*

*Chris Mitchell, Onward Innovation  
30 September 2015*





## The Project

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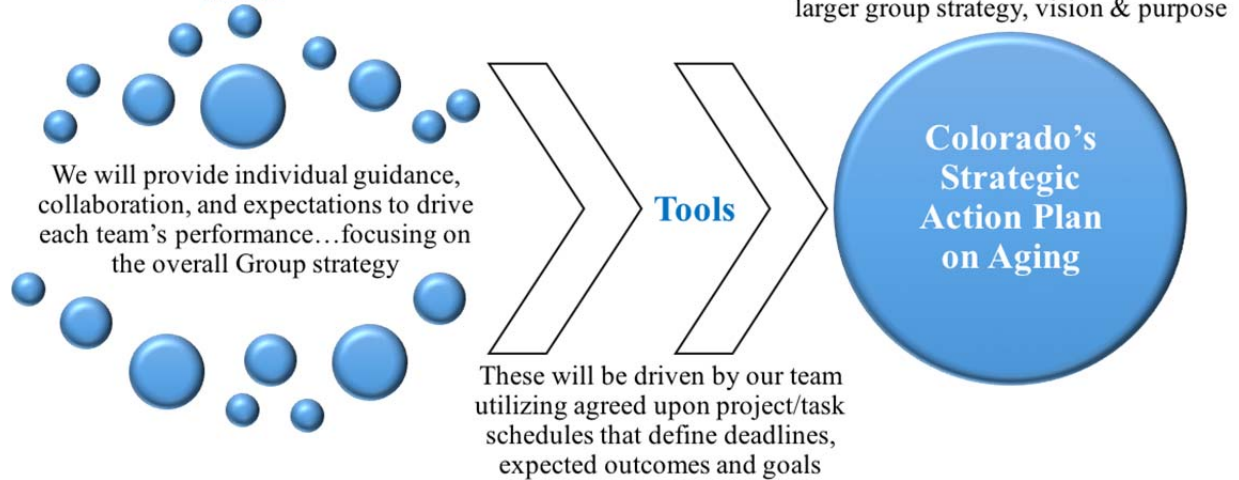
We fully support Colorado's leadership in developing the nations' first comprehensive plan on aging, and we aim to empower you to succeed in that task.



## Management & Coordination

All of these activities involve our team managing several different functions across project participants. To ensure each of these tasks are completed on schedule, and at or above the defined quality standards, we will utilize our unique operations management systems to deliver results. This process includes:

### Sub-group & sub-contractor tasks



We will also ensure the project maintains full compliance with budgetary standards of performance. This will involve our team completing the following:



Our strategy and approach for the management of this project is very hands-on. We feel confident that these methods of quality assurance and budgetary oversight will ensure the project stays on time, at budget and above expectations.

## Experience & Expertise

Through our tenures in the military, healthcare, public health, government, and various other functionalities/sectors, we have been privileged to succeed in a wide array of initiatives and

programs. It would be our honor to leverage this unique background to help your Group in this important endeavor. We humbly offer the following summary of our experiences and expertise related to your needs and this project:

- In depth experience working with and leading cross-functional and multi-sectional teams across organizations, communities, local/state/regional agencies and more
  - ✓ History of successful partnerships with state agencies, private organizations, and volunteer groups at the organizational, local, regional, state and national level
- Highly effective process managers and change agents in healthcare, public health, disaster response, transport, process improvement, change management etc.
  - ✓ Over a decade of process improvement, change management and facilitation in various initiatives for complex organizations in healthcare, public health, public, and private sectors
- Renowned for our abilities to guide and motivate others to achieve high quality results
  - ✓ All projects we have administered have exceeded desired outcomes and resulted in teams surpassing all performance expectations
- Strong history of helping cross functional groups work better and closer with state and local government agencies
  - ✓ Private, government, healthcare, volunteer relationships built throughout our involvement in statewide planning activities over the past 3 years. Frequently requested *by name* to help continue this relationship building
- Expertise in several functional areas related to this project including contingency planning, logistics/operations development, healthcare services, etc.
  - ✓ Over a decade in healthcare and public support operations, as well as statewide program improvement
- Ability to create effective briefing materials, compelling reports and written materials
  - ✓ Creation, dissemination and delivery of reports and informational materials covering single department to national level functionalities
- Policy development for national, statewide, local and organizational level programs including in healthcare and public health functions
  - ✓ Support of agencies such as The Centers for Disease Control and Prevention, The Colorado Department of Public Health & Environment, various Colorado Local Public Health Agencies, and numerous other organizations in the development of robust and actionable strategies and plans
- Management of budgets up to 54M+, with the ability to meet or exceed expectations while still making fiscal performance simple enough for even the smallest organization
  - ✓ History of successful budgetary oversight both as an organization and for our clients

- Proven ability to work independently under tight timelines. Self-paced and efficacious in a wide variety of tasks. Able to get the job done ahead of schedule, on time and always under budget
  - ✓ Our main source of repeat and new business is from past clients, because of our earnest mastery of exceeding expectations
- History of being an exceptional state contractor in full compliance with fiscal, insurance, reporting and all other requirements
  - ✓ Contracting since 2012, at both state and local levels, with consistently exceptional performance in all engagements

Our team is confident we can ensure the success of this project and help the committee meet their goals by leveraging our expertise and proven abilities. Amongst all of our accomplishments on such a wide variety of projects, the most notable experience has always been the honor of helping others thrive.

## Budget

Our team is fully committed to fairness and transparency in pricing. As such, we respectfully offer our proposed pricing details for your review below:

Activity	Rate	Units	Total Cost
<b>Labor Hours and Costs</b> Project Facilitator #1	\$100.00/hr.	500	\$50,000
<b>Labor Hours and Costs</b> Project Facilitator #2	\$100.00/hr.	350	\$35,000
<b>Travel</b> (duration of contract period, reimbursed amounts not to exceed)	N/A	N/A	\$2,500
<b>Materials</b> (duration of contract period, reimbursed amounts not to exceed)	N/A	N/A	\$2,500
<b>Total</b>			<b>\$90,000.00</b>

This pricing proposal is based upon several assumptions and our commitment to support the Strategic Planning Group not only with our expertise, but also through forecasting and budgeting for additional minor fiscal needs should they arise. These assumptions include:

- Our project team will be interchangeable between its two members rather than a structure wherein a Project Manager is the sole facilitator, and therefore a single point of failure. Both of our staff will be able perform all tasks required by the group, together and/or independently. We feel this is important because it ensures full functionality and success of this critical initiative regardless of any unforeseen events.

- Our travel costs are ‘reimbursed-not to exceed’ meaning we will not invoice over this contractual cap. This is based on our understanding that most Group meetings will be held in the Denver metro area. However, as is reflected in the funds, we have also apportioned a small contingency should any other, infrequent, need to travel to other locations in the state arise.
- Our material costs are based on the creation and delivery of reports and hand-outs for the project as needed. They were determined using information gained during the RFP conference call held on 23 September 2015 wherein it was explained any large scale printing would be done via other mechanisms/funding, but that contractors should also be prepared to support material costs for smaller ‘runs’ should it be needed.
- We have not included any costs associated with website development, compensation of external contractors, survey collection tools, or other non-project administration tasks as we understand these will be funded through other mechanisms per the conference call held on 23 September 2015.

## References

We have been honored to work with many exceptional organizations and people. Throughout these partnerships, we have earned the respect of people who, like this committee, are devoted to helping improve the lives of Coloradans. It is our privilege to offer a sampling of these clients as references for you.

<b>Tony Cappello PhD, MPH</b>	President of the Colorado Board of Health & Public Health Director of the Northeast Colorado Health Department 700 Columbine Street, Sterling, Colorado 80751 970-522-3741 ext. 1260 tonyc@nchd.org
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We have worked with Tony and his team at The Northeast Colorado Health Department (NCHD) on several initiatives. Specific activities with bearing to this project are:

- Collaboration and collection of information from various staff across NCHD. Working closely with them to understand their unique population and services platforms and then incorporating this information into all our activities
- Collection and analysis of public health/population information and its incorporation into several dynamic programs directly related to and supporting NCHD’s strategic plans
- Engagement of NCHD and other staff with various materials, facilitation of several workshop activities and provision of individualized support across the team
- Creation of detailed yet helpful reports to assist Tony and his leadership teams in creating/modifying their internal, external and strategic plans to better support the *people* in their organization and six county jurisdiction

Melanie  
Simons  
MPH

Strategic National Stockpile Program Manager  
Colorado Department of Public Health & Environment  
4300 Cherry Creek Drive South, Denver, CO 80246  
303-692-2950  
melanie.simons@state.co.us

Melanie is a long time client of our organization. We have supported her with facilitation of several statewide initiatives, many of which involve activities directly applicable to your needs:

- Creation, planning and facilitation of well over 30 events across the state; with cross-functional groups representing public health (every agency in the state), healthcare, long-term care, skilled nursing, community support, transportation, law enforcement, volunteer and various other government and private sector agencies
- Collection and incorporation of plans, data and other information from countless federal, state, local and private programs/sources into highly informative yet relevant reports, plans, information materials/sessions, etc.
- Development of several strategic plans for statewide activities including disaster preparedness plans, multi-agency strategic level activities and more
- In depth analysis and consideration of at risk populations, including those of the growing senior demographic, as it pertains to the government's programs and support during both normal and crisis situations
- Engagement of countless public and private partners across the state in various initiatives and statewide planning/response meetings and activities
- Expert guidance on healthcare, logistical, transportation, and a wide array of other considerations with applicability both to preparedness *and* the activities of your Group
- Development, and delivery, of several documents/reports/presentations of new and existing statewide programs to local, state and federal agencies
- Management of sub-contractors, teams/agencies and personnel across public and private sectors
- Management and facilitation of meetings, planning sessions, multi-agency coordination meetings and much more

Dana  
Erpelding

Director of the Center for Health and Environmental Data  
Colorado Department of Public Health & Environment  
4300 Cherry Creek Drive South, Denver, CO 80246  
303-692-2679  
dana.erpelding@state.co.us

We have partnered with Dana on several initiatives, the most recent of which involved our design, facilitation and management of an immensely successful improvement program for several statewide functionalities in the Colorado Department of Public Health & Environment's (CDPHE) Vital Records Branch. Tasks with pertinence to your project include:



- Compiling various sources of information from national, state, local and other organizations into actionable plans, engaging materials and intuitive collaboration tools
- Design and creation of a wide assortment of communication mechanisms to engage a variety of staff in all project related information and activities
- Facilitation of numerous meetings with stakeholders across functional groups and teams
- The total reengineering/optimization of a complex operational unit that involved our direct administration of all planning, coordination, communication, facilitation, implementation, measurement and reporting activities
- Scheduling and oversight of all ‘sub-contracting’ activities performed by ancillary departments across CDPHE
- Tracking, management and successful completion of all project related tasks ranging from the most minute facet to a total organizational restructuring
- Engineering powerful yet instinctive performance measurement and monitoring tools that make efficiency easy and provided a strong foundation for continued growth
- Creating a detailed yet implementable post-project transition plan to support ongoing initiatives across the branch and CDPHE following this project’s conclusion
- The creation and delivery of several project documents, including a highly informative close out document that captured not only project activities but also highlighted the successes realized by Dana’s team and opportunities for continued performance

Each of these engagements also included several tasks indicative of our status as a successful government contractor and that have bearing on your desired project team’s qualifications. These include:

- Planning, management and completion of large scale, complex tasks without guidance or direction
- Administration of project budgets and our professional completion of all associated invoicing, fiscal and other requirements
- Facilitation of events, participation/management of meetings with cross-functional attendees and the successful coordination of groups across the spectrum of sectors
- Creation and delivery of comprehensive and informative, yet engaging and intuitive, reports that conveyed a wide assortment of information
- Forecasting and exceeding the expectations of those we partner with in everything we do

## Conflict of Interest

We confirm that we are not aware of any current or potential agreements, activities and /or arrangements between our team and any parties that cause a conflict of interest for this partnership with the Colorado Strategic Action Planning Group on Aging, its members or the associated scope of work.

## Summary

Strategic planning activities such as these are intricate projects spanning multiple industries and disciplines. If selected, we will use our experience and fruitful partnerships to augment performance and maximize results for Colorado's Strategic Action Planning Group on Aging.

We are prepared to meet the distinct needs of this committee with our extensive and versatile approach and management tools, while capitalizing on our unique background and expertise expounded in this document. Our abilities will make it easier for the committee to focus on the larger purpose of the project, while we drive the specific details needed to guarantee success.

We thank you for the opportunity to provide this information. Furthermore, we sincerely hope our capabilities, experience, and commitment to your team will present the opportunity for us to partner with you in the near future. If you have any questions, concerns, or comments, please feel free to contact us directly. We are an organization that prides itself in transparency and will honor any appropriate request for information.

Respectfully,



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