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The following examples showcase our experience in developing state and local strategic plans. These examples were selected because they closely align with the Scope of Work requested to support the California Community Reinvestment Grants (CalCRG) program.

First 5 Placer Children and Families Commission

Need: Voters passed Proposition 10, adding a 50-cent tax to each pack of cigarettes sold, to create First 5 California. First 5 California is dedicated to improving the lives of young children, 0-5, and their families through a comprehensive system of education, health services, childcare, and other crucial programs. First 5 California distributes funds to local communities through the state's 58 counties. Eighty percent of the annual revenues are allocated to the 58 county commissions, while the remaining 20 percent fund the state's overall guiding programs and administrative costs. The Placer County Children and Families Commission needed a way to expeditiously set its policies, procedures, and funding strategies in an outcome-based framework.

Approach: Facilitated the development and implementation of four three-year strategic plans to address emerging priorities such as protective factors, investment strategies, sustainability guidelines, whole person care, and trauma-informed approach. The majority of partners, including the Children's System of Care, Placer County Health Department, and Family Resource Centers serve children whose families have been affected by poverty, substance abuse problems, mental health issues, other disabilities, family violence, foster care, and incarceration. These and other partners have helped with system navigation services. Created and developed an outcome-based evaluation system to assist partners and First 5 staff in determining whether the programs were achieving the desired outcomes. Facilitated funding decisions for distribution of \$4-6 million annually to community based organizations and partners. Proposers were allowed and encouraged to attend the funding decision-making meetings.

Results: Strategic plans have been working documents that have been implemented. An independent Return on Investment evaluation showed that for every dollar spent on the outcome-based evaluation system, \$6.55 was returned to the agencies because of streamlined processes, an enhanced ability to effectively serve clients, and increased collaboration to eliminate duplication of services. Placer First 5's evaluation process has been replicated in other counties. Funding decisions have been made quickly and transparently. Even when an agency experiences a funding cut, they generally believe it was a fair process and they understand the Commission's priorities. Facilitated participatory Scope of Work Development meetings with each funded partner.

Follow-up Services: Facilitated the implementation of the strategic plan with local community based partners, as well as, community collaboratives. Developed vision and strategies to address postpartum depression. Assisted Tahoe partners in developing strategic plans for KidsZone and the Community Collaborative of Tahoe Truckee. Consulted on the development of a collaborative with schools, service providers, and government agencies serving young children. Facilitated large community meetings in Spanish with parents, caregivers and funded partners to further strategic plan strategies at the community level.

California Judicial Council and California Administrative Office of the Courts (AOC)

Need: The California Court system was under increased scrutiny from the legislature and the public because of case processing delays. AOC needed to develop a strategic planning process for the California Court system to guide both the state and local courts. The plans needed to be responsive to the public but flexible enough to address the diverse justice requirements in all California counties.

Approach: We worked first at the state level helping them to develop the strategic plan framework. Subsequently, we developed a plan and process of strategic planning for the local trial courts with community stakeholder participation. Elements of the approach were:

- Provided the Technology of Participation® (ToP) Strategic Planning course and coaching to state staff to develop a process for strategic planning for the Judicial Council.
- Facilitated high-level strategic planning sessions.
- Coached staff in rollout strategies for local strategic plan development.
- Supported a statewide conference for all 58 counties to learn the community focused strategic planning process.
- Facilitated 19 of the California Superior Courts in development of strategic plans with community advisory board members.
- Provided design services, consulting, facilitation of planning and large community meetings to involve the public in strategic planning.
- Facilitated the implementation of local court improvements (listed under results below) in several counties.

Results: Innovative strategies for improvement in the administration of justice with many implemented including improved jury services, family law facilitators, public access web/data base development, automation, community service programs, domestic violence and children's support programs. All 19 Superior Court Community Focused Strategic Plans were completed on time with many implementation successes.

Follow-up Strategic Plan Implementation:

- Facilitated four regional strategic planning meetings in different parts of the state, which every local court attended, to consolidate the three local trial court organizations into one Superior Court organization. Facilitated the local consolidation of the three local court systems. All local trial courts in California are now single focused organizations saving tax payers millions of dollars.
- Facilitated plan implementation of two one-stop self-help legal centers with the court, justice system, and nonprofit partners. Both self-help legal centers were built, staffed and operate today. One center received a state award for excellence in justice.
- Facilitated an advisory group to investigate and coordinate the use of alternative restitution and community service for offenders.
- Facilitated meetings at the local, state and national levels to improve services to self-represented litigants.
- Facilitated strategic plan meetings at the local, state and national levels on domestic violence that have resulted in improvement in the court responses in those cases.

University of California, Davis: School of Veterinary Medicine California Raptor Center (CRC)

Need: The CRC needed a strategic plan to guide its future in partnership with the university and key stakeholders.

Approach:

- Designed and facilitated strategic planning process with multiple stakeholders (UC Davis School of Veterinary Medicine, US Fish and Wildlife, CRC volunteers and staff).
- Prepared the California Raptor Center strategic plan and regularly facilitate plan implementation and re-manuevering sessions.

Results:

- Stronger partnership with the university resulted in a well-attended research seminar, ADA compliance, facilities improvements, social media presence and designation of "Raptor Road."
- Increased volunteer and funding support for CRC in rehabilitation and release of injured raptors.



CALIFORNIA FUEL CELL PARTNERSHIP

The California Fuel Cell Partnership (CaFCP) is an industry/government collaboration to expand the market for fuel cell electric vehicles powered by hydrogen to help create a cleaner, more energy-diverse future. We have facilitated numerous meetings for CaFCP resulting in successful implementation of their vision.

Strategic Road Map for Hydrogen Vehicles Demonstration Phase

Need: Worked with diverse stakeholders (auto industry, energy stakeholders, government representatives and environmental interests) to bring fuel cell technology and hydrogen infrastructure to California.

Approach:

- Designed and facilitated strategic planning process with multiple stakeholders and diverse interests.
- Facilitated conversations between auto makers, energy interests, oil companies and state and federal government representatives to determine areas of consensus and agreement.

Results: Successful implementation of the demonstration phase.

Follow up: Facilitated strategic plan, input sessions for pre-commercial phase and next strategic plan developed.

Action Plan for Medium & Heavy-Duty Fuel Cell Trucks

Need: Bringing together competing manufacturers to develop an Action Plan to begin the pre-demonstration phase of Medium and Heavy-Duty Fuel Cell Truck Development.

Approach:

- Facilitated focus groups to gather critical information for development of action plan.
- Developed and facilitated task force to determine the highest priority recommendations for near and long-term development.

Results:

Action plan developed containing California policy context, market context, priority regions, truck class focus, cost reduction considerations, meeting challenges, timing and final recommendations.

Hydrogen Dispenser Workshop Multi-Stakeholder Problem Solving

Need: Hydrogen dispenser hardware and software integration problems at stations needed to be fixed.

Approach: Worked with a group of subject matter experts to identify near term solutions and potential designs, technologies and protocols for the next generation of hydrogen dispensers to eliminate potential operational problems.

Result: Consensus reached on minimum performance standards and new ideas and solutions for resolving key issues. Agreement on policy recommendations to overcome key issues.

Fueling Infrastructure for Heavy Duty Fuel Cell Vehicles

Need: Worked with competing energy interests to create fact sheet for use by decision makers to determine investment in hydrogen fueling infrastructure.

Approach: Designed and facilitated session to determine key questions decision makers were asking. Compared experience in developing fueling infrastructure for buses. Facilitated a consensus on specific information to be included in the fact sheet. Developed an infrastructure growth chart to meet differing fueling needs for trucks.

Result: Consensus from key stakeholders on information to provide decision makers. Developed a two-page fact sheet.

Codes & Standards for Fuel Cell Trucks

Need: Worked with multiple stakeholders to develop codes and standards for new Heavy-Duty Fuel Cell Vehicles.

Approach:

- Collected information on all relevant current codes and standards.
- Built consensus with group about other safety standards and if they should be required or optional in developing the new technology.

Result: Consensus from key stakeholders on codes and safety standards.



California Interagency Collaborative Planning for Local Nutritional Health Programs

Need:

Five agencies (California Department of Public Health, California Department of Aging, California Department of Social Services, University of California Cal-Fresh Program and Catholic Social Services) needed to respond to federal mandates and assist local health educators in developing and implementing local health collaboratives to drive policy, systems and environmental changes at the community level. Each county collaborative would be responsible for developing and implementing a strategic plan to improve community health, especially in nutrition and physical activity to reduce obesity rates.

Approach:

- Provided 38 courses throughout California for local health leaders to build the capacity to lead strategic planning, facilitate consensus solutions and implement local action.
- Provided four six-month virtual mentoring/training series to apply tools and techniques learned and to deepen skills. The sessions were once per month, with individual coaching and assignments in between sessions.
- Created and published an online map and a strategic plan resource library of meeting process tools for easy access by local leaders.
<https://www.top-network.org/developing-healthy-communities>
- Facilitated the development of the 2019 state guidelines for local strategic plan development with three groups of key stakeholders.

Results:

- Consensus decision on 2019 state/local plan guidelines.
- Forty state and local leaders have received advanced training and mentoring.
- Over 300 local leaders have received facilitated strategic planning training and as a result, a majority of California counties have increased their skill in leading health policy collaboratives.
- In the first year, over twenty documented successful initiatives completed.
- At the conclusion of one local collaborative meeting the City Councilman said, "This is the best planning session that I have ever attended."

Follow up:

The program has been so successful that we are being requested to provide 18 additional courses in 2019.

Vision and Action Plan for Foresthill, California

Need: Civic organizations in an isolated, rural community needed a common vision and strategies to revitalize their community.

Approach: Formed a guide team consisting of county elected officers, economic development officials, and Foresthill business and nonprofit representatives. Developed outreach plan to engage community in large meeting to determine strategies to improve community vitality, set overarching goals to provide direction for the future, and prioritize and scope initiatives that the community would implement in the next year.

Results: Eighty-five community leaders agreed on a common vision, a direction for the future and strategies to implement improvements for the Foresthill community. Three priority projects were identified, scoped and staffed for implementation. A participatory environmental scan yielded common values, raised areas for attention and opportunities for greater prosperity and revitalization.



Board of State and Community Corrections (BSCC)

Need:

The BSCC obtains federal and state funding for local juvenile corrections programs because most of the youth served by the Juvenile Justice system have very complex needs including histories of low academic achievement, mental health issues, substance abuse disorders, family violence, and foster care. The governor's appointed Juvenile Justice Advisory Commission needed strategic planning assistance to determine program focus and pathways to direct distribution of federal funding to local programs such as assistance with systems navigation, job training, and educational placement.

Approach:

- Analyzed federal guidelines for applicability to California needs.
- Designed process for the Juvenile Justice Advisory Commission to discuss and determine which strategies California would adopt from the federal guidelines.
- Facilitated two half-day commission decision making sessions to determine strategic priorities.

Results:

- Three-year funding priorities and strategic goals were established with full consensus in two half-day sessions.

Follow up:

- We have provided courses in both facilitation and strategic planning to BSCC staff. They are now equipped to lead meetings to produce consensus results quickly.

Sandia National Laboratories

Need: Strategic plan to Increase Diversity and Inclusion in staff recruitment.

Approach:

- Developed a five-year vision and strategic plan to enhance the Diversity and Inclusion efforts.
- Facilitated a session with 80 plus staff to guide ongoing efforts to improve diversity recruitment, retention and effectiveness across key programs.
- Transferred skills in the keys to successful implementation of plans. Provided facilitation of quarterly updates and annual reviews to keep implementation on track.
- Provided training program and consulting to enhance implementation by identifying strategic priorities.

Results:

- Several initiatives have been successfully launched resulting in a more inclusive workforce.

