

Strategic Planning Consultant:

Dr. Kevin Christophe, PhD, PMP[®], RBPMP[®], Prosci[®]



- Principal of [Progress Consulting](#), an Organizational Development (OD) and Organizational Change Management (OCM) firm.
- Twenty-three (23) years specializing in strategic planning, change management, and executive coaching.
- **Authored:** *Coaching for Business Results* (Deloitte Consulting, 2009). *Best Practices for ERGs* (EEO Insight, 2015), and *The African American Sourcebook: Tribute to Thurgood Marshall*, (Federal Judiciary, 2002).
- **Education:** PhD, and MA in Organizational Psychology, Alliant International University; BA in Psychology, University of California, Berkeley.
- Some clients include, Caltrans, Department of Health Care Services, Sutter Health, and Toyota.

Goals and Deliverables for Strategic Planning Consultant

Goal

Create the CCDA 2025-2028 Strategic Plan to continue the mission to promote disability access in California through dialogue and collaboration with stakeholders including, but not limited to, the disability and business communities and all levels of government. This plan ensures that CCDA's work is done through the lens of equity. It contains the Balanced Scorecard (a strategic framework) that aligns CCDA's vision with goals, objectives, targets, and initiatives.

Deliverables:

1. Strategic Design and Stakeholder Assessment
2. Design and Facilitation of Strategic Planning Key Groups and Events
3. Drafting of Strategic Plan
4. Project Management

Deliverable 1 Tasks

- **Project strategic analysis.** Reviewed strategic plans (CCDA' 2020-2024 and DGS' 2024-2025: (1) Developed analysis questions and proposed the Balanced Scorecard (BSC) as a strategic management tool. BSC will align CCDA's vision with performance drivers (scorecards with objectives, measures, initiatives and targets).
- **Stakeholder assessment w/selected interviews.** Developed stakeholder assessment questionnaire and interviewed eight (8) commissioners. This strategy is the first step in providing commissioners hands-on participation in plan development per their request. Also discussed BSC and engaged the Commissioner Checklist Committee in a visioning exercise, collecting their insights for the CCDA's Strategic Plan' 2025-2028.
- **Process design and project work plan development.** Submitted iterative Work Plan based on the Project Management Book of Knowledge (PMBOK)® Guidelines, containing the five-work group processes (Initiating, Planning, Execution, Monitoring & Controlling, Closing).
- **Liaison w/CCDA project team and stakeholders.** Consultant is planning and presenting at scheduled Commissioner Committee meetings in collaboration with CCDA project management team (CCDA). Presented at Legislative and Checklist Committee meetings.
- **In-person meetings with CCDA staff for design and additional development via phone/email/online interface.** Consultant is engaging in weekly progress report meetings with CCDA staff via phone/email/online.

Deliverable 2 Tasks: Design Team

Working Session:

1. Review

- a) Aggregate summary of commissioner stakeholder interviews.
- b) Draft, develop, and review external stakeholder assessment forms.
- c) Draft stakeholder list to add organizations and individuals to the following groups:
 - 1. Business Owners
 - 2. Disabled Community
 - 3. Internal staff
 - 4. Government agencies (DOR, cities and local municipalities').
 - 5. Attorneys who litigate accessibility cases

2. Outline options for additional external data gathering via survey for stakeholder information and investigate possible use of website assistance. Sources include,

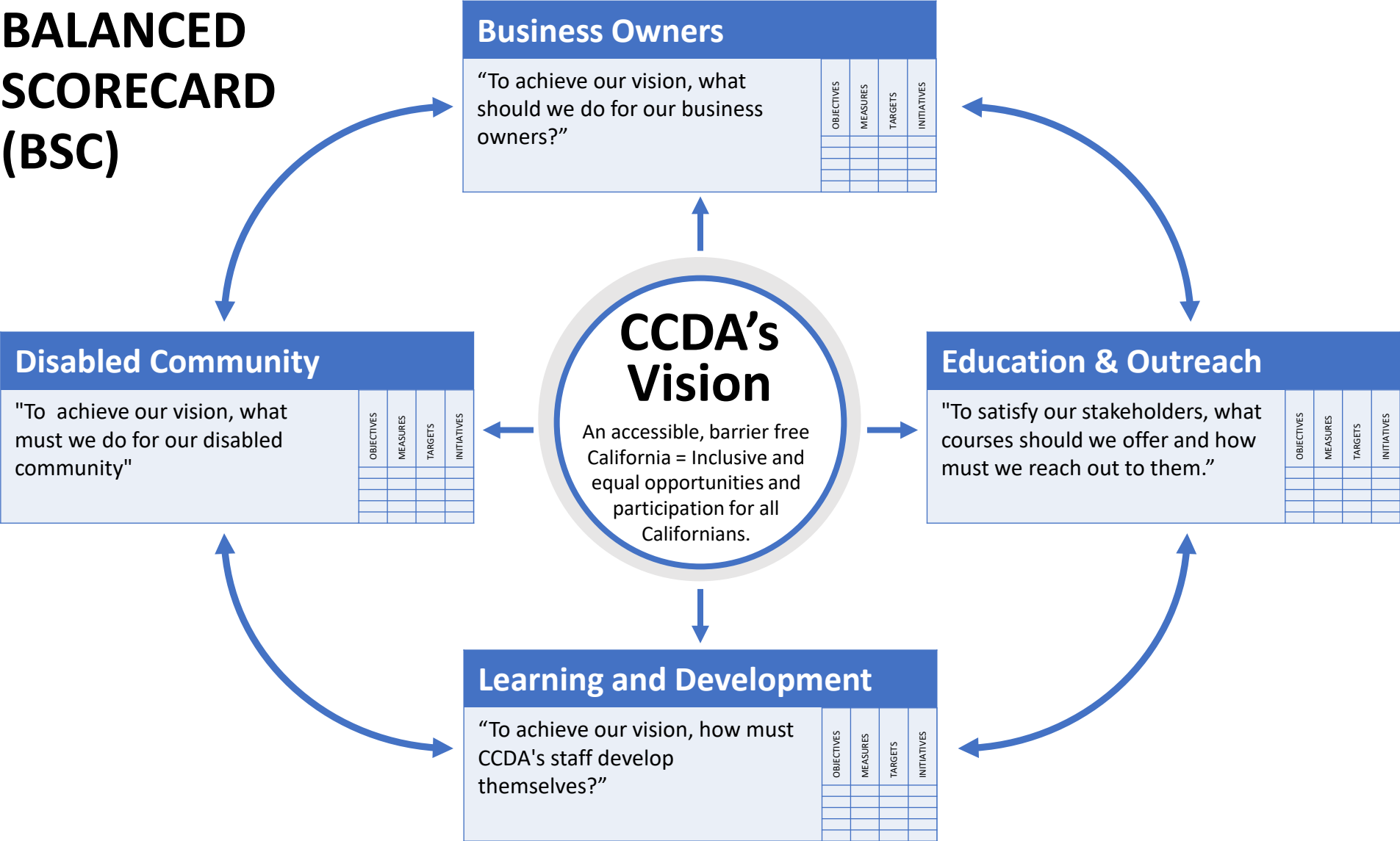
- a) CCDA's website, Newsletter, Facebook, and YouTube accounts.
- b) California chambers of commerce and ethnic chambers.
- c) MS Forms for the survey collection tool.

3. Generate ideas for planning two (2) summits.

Visioning Exercise

- Recall silently a time in your life where you felt fulfilled or satisfied....What was it? What were you doing? How did it make you feel?
 - Now , imagine if CCDA brought you that same sense of fulfillment. What services would it provide, how would the business owners and disabled communities feel?
 - Please answer these questions, first in the chat or make a mental note before we discuss them:
 - What do you like about CCDA?
 - What needs to be improved?
 - What needs to be in CCDA's strategic plan now and in the future to realize its vision: *An accessible barrier free California = inclusive and equal opportunities and participation for all Californians.*
- ***Open discussion....***

**BALANCED
SCORECARD
(BSC)**



BUSINESS OWNERS' SCORECARD

To achieve
our vision
how must
we appear
to our
business
owners

OBJECTIVES	METRIC	TARGETS	INITIATIVES
Respond effectively to a demand letter to reduce possible lawsuit	Count number of demand letters that result in a lawsuit versus those that do not	Decrease number of lawsuits filed by 30%	Announce availability of information on "How to respond to a demand letter"

DISABLED COMMUNITY SCORECARD

To achieve our vision, what must we do for our disabled community

OBJECTIVES	METRIC	TARGETS	INITIATIVES
Develop website access webinar with DOR.	Count number of participants who attended webinar and plan to embark on website accessibility redesign projects.	30% of participants started a redesign project for website accessibility.	Begin webinar design and announce the project in the CCDA's Newsletter.

Executive Committee's Task: Validation Checklist - Goals/Objectives

An accessible barrier free California = inclusive and equal opportunities and participation for all Californians

GOAL/OBJECTIVE Specifically Worded	RATING	METRIC	INITIATIVES	RETAIN / DISCARD	IMPLEMENTATION YEAR
Increase business owners' awards for grant funding for accessibility projects.	3 = High relevance to CCDA'S vision 2 = Relevant to CCDA's vision 1 = Low relevance to CCDA's vision 0 = Irrelevant to CCDA's vision	Count numbers before and after campaign	Research funding Inform business owners of funding opportunities via announcements at chambers of commerce, social media, etc.	Retain	2025