



“ROADMAP TO RESULTS” 2013 Competition Application Form

Please e-mail the completed, signed application and required attachments to applications@consultingalliance.org by 5 p.m. EDT on September 16, 2013. If you have questions about the competition or application, please send an e-mail to questions@consultingalliance.org. If you are interested in Competing and need application assistance, send your name and company name to applications@consultingalliance.org by Sept 6, 2013.

Applicant Information

Organization name	Commission on Economic Opportunity for the Greater Capital Region, Inc. (CEO)
Former name (if changed)	
Mailing address	2331 Fifth Avenue, Troy, NY 12180
Phone #	(518) 272-6012
Fax	(518) 272-0658
e-mail address	ecote@ceo-cap.org
Name/title of organization leader	Katherine Maciol, President/CEO
Name/title of contact person	Emily Cote, Marketing and Communications Specialist
Organization website	www.ceo-cap.org
Number of years in operation	48 years
Number of full-time (equivalent) employees	233
Size of 2013 budget or 2012 revenue	\$18,902,161

Attachments

Submit the following attachments with your completed application via e-mail to applications@consultingalliance.org:

- The names and organizational affiliation of your board members, if applicable.
- An organizational chart with the names and titles of all executives and managers.
- Your 2012 annual report, if applicable.

Questions

Please answer the following questions (you may attach up to 10 additional pages to this application).

1. In one paragraph, please describe what your organization does and for whom.

The Commission on Economic Opportunity (CEO) is a human services organization offering over 25 unique programs and services which assist Capital Region residents in need. Our programs support the success of individuals, families, and the community as a whole, by providing educational opportunities, financial empowerment, wellness support, and healthy home improvements. We serve over 14,000 local residents a year, spanning all age, gender, and cultural demographics.

2. Why are you applying? What are you hoping our support will enable you to do? Why is that important?

Within the last year, CEO has welcomed a new President, shifted its organizational structure, and developed new programs to meet the growing needs of the community. However, CEO's brand has remained relatively unchanged for the last 48 years. We have identified challenges surrounding the organization's name, image, and current messaging; and we would like to alleviate those challenges through a rebranding campaign that ties in with CEO's upcoming 50th Anniversary in 2015.

Winning the Roadmap to Results competition would enable CEO to engage a professional organization in navigating the rebranding process. We believe there is tremendous value in this: we cannot afford to lose current donor market share, and yet, we also cannot afford to keep our brand stagnant. CEO is missing out on a very large percentage of the local donor market due to a lack of cohesive messaging and an outdated image. Suffering from wide-spread funding cuts and shrinking donor contributions, CEO needs to engage the local audience more effectively in order to maintain its program operations and meet the community's ever-growing needs. The agency is dedicated to providing the highest -quality programming possible. Unfortunately, like other non-profits, this means running the business very "lean," which severely limits the budget available for marketing and development.

3. What specific issue(s) would you like our consultants to focus on?

We would appreciate guidance on the following topics:

- *Brand imagery/logo design/visual themes*
- *Messaging, both internal and external*
- *Identifying CEO's potential donor audience*
- *Identifying the marketing channels that will best reach the identified donor audience*

- *How to budget for a rebranding campaign*
4. What, if anything, have you done in the past on your own or with other consultants to address this issue(s)? What was the result?

In 2007, CEO hired a communications consultant to assess the agency's brand. The consultant provided an in-depth report which identified a number of challenges, many of which are still relevant today. However, at the time, the organizational leadership was not structured in such a way that the recommended changes could be implemented effectively. Also, though the assessment portion of the report was quite valuable, the recommendations offered did not resonate with leadership staff at the time, and the decision was made not to move forward.

Seeing that CEO has evolved tremendously over the past six years, and the organizational structure is now well-suited for embracing forward momentum, the agency is properly poised to do the work necessary to update its image.

5. The Consulting Alliance is interested in supporting organizations with a track record of success and the staying power to continue to operate well into the future. Please give us a summary of your history and your prospects for the future.

CEO's record of success is unchallenged. The agency grew from the seeds of Community Action, beginning with only a handful of small programs operated in the basements of local churches. Today, CEO employs over 250 local residents and offers over 25 unique programs and services including Head Start, WIC, YouthBuild and the Foster Grandparent Program. CEO's programs are of the highest quality, and they are run with nothing but the utmost regard for fiscal responsibility. In fact, 92% of CEO's funds are spent on direct services, with the agency routinely passing State- and Federally-regulated audits with flying colors.

To fully appreciate the impact that CEO has had in the community, as well as CEO's programmatic growth, one must only look as far as the 2012 Annual Report, to see the success by the numbers:

- *Seniors in CEO's Foster Grandparent program donated over 119,000 hours of service to local children, offering emotional support and mentoring. The program also allows low-income seniors to earn a stipend, helping them as they, in turn, help others.*
- *Fathers of 310 Head Start and Early Head Start children participated in father-involvement activities, thanks to CEO's Head Start Fatherhood Initiative.*
- *Over 165,000 meals were provided to over 18,000 residents through CEO's food pantry – numbers that continue to grow each year.*
- *CEO's Volunteer Income Tax Assistance Program prepared 361 tax returns for eligible residents, earning those customers over \$500,000 in refunds.*

6. The Consulting Alliance is interested in supporting organizations that act with integrity and have a positive impact on their employees, communities, and customers. Please tell us about your mission, principles, and/or values, and provide some examples of how you have been guided by these to make decisions and/or to take action in the past.

CEO's Mission is to "preserve and advance the self-sufficiency, well-being, and growth of individuals, children, and families through education, guidance, and resources."

Every one of CEO's programs supports the above mission by offering hands-on, educational programs that empower their customers. CEO's programs do not offer hand-outs, but rather give their customers the tools they need to become self-sufficient through their own hard work and dedication. This preserves each customer's dignity and allows them to achieve personal growth on their own terms, building skillsets that can be called upon for a lifetime.

CEO upholds this mission not only for the many community members served by its programs, but for its employees as well. CEO offers its employees competitive wages (when compared to other local not-for-profits) and a comprehensive benefits package. Health and wellness are strongly supported, with CEO having just secured a \$500 "HR Wellness Hero Award" offered by CAP-COM Federal Credit Union. This will be used to provide company-wide health supports, such as nutrition and personal training services. In the recent past, CEO has offered free Zumba classes, stress-management courses, and a "Staff Day" celebration with a health-centered focus. The agency empowers its employees to become financially secure and both physically and emotionally healthy. CEO's President, Katherine Maciol, was previously the Mental Health Commissioner for Rensselaer County, and she places a high emphasis on work/life balance, encouraging staff to manage their stress and take personal time when needed. All of this promotes excellence in a first-class administration where, unfortunately, marketing is not as well-supported by grants and other resource opportunities.

7. Please tell us why you believe you should win this competition.

CEO is a Capital Region "hidden gem," and in my humble opinion, this is almost criminal. I have been employed with CEO for just under a year, and I can tell you with all honesty that it has been the single best year of my career. The company culture is supportive, innovative, and open to collaboration. CEO partners with a number of high-quality organizations including Habitat for Humanity Capital District, Ronald McDonald House, Unity House, and CAP-COM Federal Credit Union, to create more comprehensive service offerings and provide more value to the community, all while reducing duplication of services and maximizing resource allocation. I truly believe, having witnessed them in operation with my own eyes, that CEO's programs are the best of their kind in the region. My only hope is that, as CEO's Marketing and Communications Specialist, I can help CEO to step out of the shadows, creating a brand that accurately communicates all that we do here, and finally gives CEO the recognition it truly deserves in the Capital Region community.

8. Feel free to send any other information that would support your application.

Please see attached:

- Summer 2013 Newsletter

Signature

I have read and agree with the competition eligibility and required time commitments detailed on the "Roadmap to Results" Information Sheet. I grant the Consulting Alliance the right to use my company's name and location in promotional materials.



Marketing and Communications Specialist 9/11/13

Date

If you do not win the competition, would you be interested in having a Consulting Alliance member contact you if they have the expertise to assist with your needs?

Yes

No

How did you hear about the Roadmap To Results competition?

LinkedIn message originally sent to Annmarie Lanese, who is on the CEO Foundation Board of Directors.

“ROADMAP TO RESULTS” Competition Information Sheet

Overview

The Consulting Alliance announces “Roadmap to Results,” a regional competition open to area for-profit, not-for-profit and public organizations. Valued at \$24,000, the first-place award provides the winning organization with a complimentary, four-day consulting engagement with a team of experienced Consulting Alliance members. The result will be a customized roadmap to help the winning organization reach its desired goals.

The winner will receive:

- An in-depth assessment of the current operating environment, including challenges and opportunities, by the consulting team
- A full-day, in-person working session with the consulting team and the management team
- A half-day meeting with the consulting team and the management team to present recommended strategies and tactics to address challenges, leverage opportunities and reach desired objectives

Additional consulting engagements may be awarded to runner-up organizations.

Winners will be announced at a special event on October 29, 2013 and the consulting services are expected to be delivered by the end of February 2014.

The Consulting Alliance offered this competition as part of last year’s 20th Anniversary celebration to strengthen the community and contribute to the success of the region. The success of last year’s projects clearly warranted continuing this initiative.

Eligibility

The “Roadmap to Results” competition is open to for-profit, not-for-profit and public organizations. The consulting site (main office, facility or headquarters of the winning organization) must be within 60 miles of downtown Albany.

Deadline

Applications must be sent electronically to applications@ConsultingAlliance.org by 5 p.m. (EDT) on September 6, 2013.

To Enter

All entries must include:

- A completed Consulting Alliance “Roadmap to Results” application form signed by a representative of the organization
- Required attachments listed on the application

Verification and Clarification

If requested, the entrant agrees to furnish additional or verifying documentation to the Consulting Alliance selection team. Failure to do so in a timely manner may result in disqualification.

Judging

A selection team of consultants from the Consulting Alliance will review all applications and select a group of finalists. Finalists will be scheduled for interviews with the selection team to assess the likelihood of a successful project outcome for both parties. Finalists unable to schedule or participate in interviews during the time frame established by the selection team may be disqualified. The Consulting Alliance reserves the right to select one or more winners.

Applicants who already have personal or business relationships with one or more Consulting Alliance members will not be given preferential treatment during the judging. Any members of the selection team with a personal or professional relationship with any of the applicants will recuse themselves from the judging of that applicant.

Decisions by the selection team, including eligibility, qualifications and the winner(s), are final.

Selection Criteria

The Consulting Alliance Selection Team will consider the following criteria to select a competition winner(s) among the applicants:

- Management team committed to growth and innovation
- Commitment to actively collaborate with the Consulting Alliance during the engagement to ensure a successful outcome
- Proven track record of success
- Has the financial and human resources to implement strategic and tactical recommendations
- Organization acts with integrity and strives to have a positive impact on their employees, communities, and customers
- Applicant’s needs are a good match with the consulting team's expertise

Award Announcement

The winner(s) will be announced at an evening event on October 29, 2013 at the Italian American Community Center in Albany. Attendance at the awards event is **required** to claim the prize.

Use of Application Information

Information included on the application form, other than the organization's name and location, will be seen by Consulting Alliance members only and not released to the public, unless permission is granted in advance by the applicant.

Permission for Promotion

All applicants grant permission to the Consulting Alliance to use their organization's name and location in promotional materials, including, but not limited to, press releases, websites, marketing literature, social media and promotional events.

The winner(s) will grant permission to the Consulting Alliance to use additional information for promotional purposes, such as descriptions of the winning organization(s), a general description of the project and other information about the engagement. The content of promotional materials will be mutually agreed to by the winner(s) and the Consulting Alliance.

The Consulting Alliance grants permission to and encourages all applicants to publicize their participation in the "Roadmap to Results" competition.

Obligations and Disclaimers

Time Commitment and Materials

Finalists will participate in a 30-minute interview with the selection team in late September, 2013 to explain how they will benefit from the consulting engagement and to pitch why their company should win the competition.

Winning organizations agree to participate actively in the consulting engagement to ensure success and to provide the following:

- A single point of contact to work with the Consulting Alliance consulting team for administrative tasks (e.g., scheduling meetings, providing additional information, etc.)
- Briefing materials describing the organization's situation, marketplace, challenges, opportunities, threats, products and services and/or other background materials relevant to the engagement

In addition, the senior management team and relevant stakeholders agree to:

- Participate in a full-day, in-person briefing session and/or participate in one-on-one interviews with the consulting team to share knowledge, fill information gaps and discuss potential directions
- Participate in a half-day meeting during which the consulting team presents recommended strategies and tactics to reach desired results. This meeting will allow time for the senior management team to ask questions regarding the recommendations, if desired.

If runner-up organizations are selected, the time commitment and material requirements may vary.

Recommendations

The winner(s) has no obligation to act upon any of the recommendations presented by the consulting team. The Consulting Alliance and its members accept no responsibility for the success or failure of any recommendations implemented in whole or in part by the winning organization(s).

No Obligations after the Engagement Ends

The Consulting Alliance has no obligation to offer complimentary consulting support to the winning organization(s) after the final, half-day meeting with the management team.

The winner(s) is not expected to hire one or more Consulting Alliance members after the completion of the engagement; however, the winner(s) may do so, if desired.

About the Consulting Alliance

The Consulting Alliance is an association of leading independent consultants with diverse regional and national experience and proven success in solving client challenges. It is the ideal resource for organizations seeking to hire a consultant with the highest level of professionalism and expertise. Membership in the Alliance provides consultants with a vibrant and collaborative community where they can grow their businesses and advance their skills. For further information, visit www.ConsultingAlliance.org.