

EXCELLENT ANCILLARY SERVICES INSTITUTE, LLC.

A STRATEGIC BUSINESS PLAN

“Ancillary Service Is Our Business”



REVISED

1/1/2018

FOREWORD: THE VISION

In this era of accountability, it has become increasingly important for governmental as well as private agencies to validate effectiveness. In the past, well-intended service providers have had the latitude of implementing services and training based on tradition or some unsubstantiated hunch. Untrained service providers generally harbor nothing less than the best of intentions. However, casual approaches to program planning, implementation and evaluation omit safeguards against many common threats to validity. No longer is it acceptable to merely develop and implement services, then casually assume the desired outcomes have arbitrarily been accomplished. Successful agencies are beginning to employ the expertise of “qualified” professional programmatic, finance, and research consultants to ensure that services and training are not only reliable, but valid as well. Hence a great deal of deliberation went into the development of a sound, but constantly evolving business plan to ensure valid ancillary organizational development services at a fair market rate.

On those rare occasions, when it becomes most apparent that certain ancillary tasks are not feasible for an agency to proficiently and accurately accomplish, due to time restraints, cost, and limited resources, there should be a willingness to accept, embrace and even celebrate a need for contractual services. Thanks, in advance, for considering Excellent Ancillary Services Institute (EASI), LLC, the next time your agency needs some evidence-based, integrity-driven, capacity (growth) solutions, at an affordable price from a small Florida Certified Minority Business Enterprise that is incorporated and in good standing with the Department of State’s Division of Corporations. EASI’s specialty areas include, but are not limited to:

- capacity building;
- collaborations;
- compliance and monitoring;
- contracts;
- data analyses;
- debt recovery;
- evidence-based research;
- grants;
- logistics;
- performance-based funding;
- strategic imperatives;
- staff supervision; and
- teaching and training.

This document represents a compilation of expertise obtained during approximately twenty-five years of enthusiastic, ethical, practical and theoretical involvement in teaching, research and service. Hence, this consultative model is both theoretically-based and a matter-of-fact guide for improving individual and organizational effectiveness.

EASILLC.US

STRATEGIC BUSINESS PLAN

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ORGANIZATIONAL INFORMATION:

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Business Address: 216 West College Avenue, #11013, Tallahassee, FL 32302
Email: ike_g2002@yahoo.com
Website: www.easillc.us
Telephone: (850) 264-7100
Certification: Certified Florida Small Minority Business Enterprise, (06/26/2018-06/26/2020)
Established: Business Incorporation – 06/04/2013
Incorporated: Florida Department of State, Division of Corporation – Good Standing Status

MISSION:

EASI shall provide evidence-based, integrity-driven, contractual services at a fair market rate to assist individuals and small agencies in Leon County, Florida to enhance, expand, and improve business.

NEED:

- 2012-16: Civilian Labor Force: % of population age 16 years + 66.1% (Source: US Census Bureau, 2017)
- 2016 : Total Employers Establishments: 7,603 (Source: US Census Bureau, 2017)
- 2012: All Firms 22,603 (Source: US Census Bureau, 2017)
- 2012: Men Owned Firms 11,830 (Source: US Census Bureau, 2017)
- 2012: Women Owned Firms 8,464 (Source: US Census Bureau, 2017)
- 2012: Minority Owned Firms 6,295 (Source: US Census Bureau, 2017)

A SYSTEMS APPROACH TO CAPACITY BUILDING AND COLLABORATING

- 2012: Veteran Owned Firms 2,663 (Source: US Census Bureau, 2017)
- 2017: Under Age 65 with Disability 7.8% (Source: US Census Bureau, 2017)
- 2017: Under Age 65 with Without Health Insurance 10.2% (Source: US Census Bureau, 2017)
- 2017: Leon County Population Projection Total 290,292 (U.S. Census, 2017)
- 2017: Leon County, 19% or 55,155 are persons living in poverty
- 2017-18: LCSD Students **receiving free or reduced price lunch** Total **19,138** or **55.8%** of the number of students 34,268 (Source: FLDOE, 2018)

OBJECTIVE#1:

The following measurable objective reflects EASI's one performance measure for 01/01/18-12/31/2018:

EASI shall provide evidence-based (best practices from empirical investigations), integrity-driven (with the highest level of professional ethical standards) contractual services at a fair market rate pursuant to the U.S. Department of Labor, Bureau of Labor Statistics' Occupational Outlook Handbook's national fee averages for providing the following specific services and products to a minimum of 100 (25 women, 50 minority and 25 veteran firms) individuals and public/private for-profit and not-for profit businesses in Leon County, Florida. EASI's specialty areas for a minimum 20 hours for each business owner or a total of 2000 hours collectively, shall include, but are not limited to:

- capacity building;
- collaboration, teamwork: Systems Approach (Bertalanffy, 1968);
- compliance and monitoring;
- contract development, training and evaluations;
- data collection, organization, analyses, reporting and decisions;
- debt recovery (civil judgments);
- evidence-based research, decisions and policies;
- fundraising: auctions, event concessions, Go-Fund-Me; letter writing, & grassroots events;
- grants development, training and evaluation;
- logistics: equipment, inventory, and supplies;
- performance-based funding;
- strategic imperatives planning: Force Field Analysis (Lewin, 1951), MBO (Drucker, 2001), SWOT (Humphrey, 1968);
- staff selection, orientation, development, supervision and evaluation; and
- university: research, service, & teaching.

Work Plan: Activities, Benchmark, Contact, Cost (Drucker's MOB)

| <u>Priority Activities</u> | <u>Dates</u> | <u>Rank</u> |
|---|----------------------|--------------------|
| Brochure Modification and Maintenance | 01/01/18 -12/31/2018 | = important |
| Budget Development, Entries and Amendment | “ “ “ | “ “ “ |
| Business Plan or Operating Agreement (Adherence/Modification) | “ “ “ | “ “ “ |
| Continuous Referrals: FDN Ctr., FDOS, FSBDC, IRS, PBS, SBA, USDOL) | “ “ “ | “ “ “ |
| Continuous Improvement (Formative/Summative Evaluation) | “ “ “ | “ “ “ |
| Data Collection, Retention, Reports & Decisions | “ “ “ | “ “ “ |
| Focus Group Research/Feedback (Self Evaluation) | “ “ “ | “ “ “ |
| Marketing : Brochures, Business Cards, Letter, & Online | “ “ “ | “ “ “ |
| Preplanning: Strategic Imperatives | “ “ “ | “ “ “ |
| Purchase Equipment, Materials and Supplies | “ “ “ | “ “ “ |
| Record: Financial Mgt, Record Keeping and Retention | “ “ “ | “ “ “ |
| Research & Development: Equipment, Information, & Training | “ “ “ | “ “ “ |
| Subcontracting | “ “ “ | “ “ “ |
| Submit Invoices, Reports (e.g. Annual Report: Division of Corporation | “ “ “ | “ “ “ |
| University Research, Service, and Teaching Opportunities | “ “ “ | “ “ “ |
| Volunteerism With Favorite Local Public Charity | “ “ “ | “ “ “ |
| Website Updates: Domain, Hosting, Revision, Continuous | “ “ “ | “ “ “ |

COMPETITIVE ADVANTAGE

A SYSTEMS APPROACH TO CAPACITY BUILDING AND COLLABORATING

For your review, attached is a brief synopsis of Senior Consultant's formal education and professional experiences. As you will notice, he has a long history of assisting diverse types of agencies to advance while in various research, service, and teaching positions throughout four states. In avoidance of repetition, as well as showing respect for your undeniably demanding schedule, he contends the attached summary of his qualifications illustrates knowledge, skills and abilities (KSAs) acquired over the last few decades conducive to a sound, contextual, ethical, and scholarly foundation. Beyond the obvious academic and career/technical KSAs, hopefully his synopsis, presence (should you meet him), and references will substantiate his other equally critical traits including, but not limited to character, chivalrousness, civility, critical thinking, decency, due-diligence, fairness (egalitarian), integrity, wisdom (Prov. 9:10), and a respect, as well as a celebration, for humanity relevant to your consultative needs. Of course, he will graciously accept an invitation for a cost free initial consultation to further assess the existence of a statistically significant positive correlation between his KSAs, personal traits, and the strategic imperatives of your business.

TARGETED MARKET

In accordance with the U.S. Department of Commerce, Quick Fact Statistics, the population projections for July 2018 in Leon County, Florida is 290,292. Of the 22,603 firms locally, (Source: US Census Bureau, 2017), EASI shall target 100 firms (25 women, 50 minority, and 25 veteran firms) from the categories below. Specific marketing interest shall be placed on organizations that were newly formed in 2018 and those that reported \$25,000 or less on their 2017 annual report to the Florida Department of State, Division of Corporations.

- 2012: Men Owned Firms 11,830 (Source: US Census Bureau, 2017)
- 2012: Women Owned Firms 8,464 (Source: US Census Bureau, 2017)
- 2012: Minority Owned Firms 6,295 (Source: US Census Bureau, 2017)
- 2012: Veteran Owned Firms 2,663 (Source: US Census Bureau, 2017)

REGULATORY RESTRICTIONS

This organization shall be governed by and construed in accordance with the statutes and rules for the State of Florida, as well as the U.S. Department of Treasury, Internal Revenue Services' regulatory guidance as related to Limited Liability Companies.

INCORPORATION

The decision was made to incorporate as a Limited Liability Company with the Florida Department of State, Division of Corporations, for the following reasons:

- **Less Paperwork:** LLCs require less paper work and are not bound to as many requirements as other types of companies. Moreover, the member(s) have more latitude for creating guidelines and/or operating agreements as opposed to having to adhere to more complex and stricter requirements.
- **Limited Liability:** Unlike a Sole proprietorship, LLCs protect members from being personally liable for debts and court judgments incurred by doing business, thus protecting personal assets.
- **Tax Flexibility:** Since a single member Limited Liability Company (LLC) is taxed like a sole proprietor, business profits and losses are taxed through the sole member's personal federal tax return.

PAST EFFECTIVENESS

- Accreditation and Institutional Effectiveness
- Business Plan Development Expertise
- Compliance and Monitoring Experience
- Contract Negotiations
- Data-Driven/Evidence-Based Research and Decisions
- Debt Recovery
- Doctor of Philosophy Degree: Educational Leadership, Mississippi State University
- Equipment Acquisition and Disposition
- Evaluation: Continuous Improvement Model – Formative and Summative
- Fiscal Planning, Management and Evaluation: Operating and Program Budgets

A SYSTEMS APPROACH TO CAPACITY BUILDING AND COLLABORATING

- Florida Department of Education (15 Years)
- Florida Educational Leadership Examination: Competency
- Former University Director of Distance Education
- Grants Administration: Annually - 67 School District, 28 Colleges, 40 Tech Centers, 10 CBOs, & 4 Universities (Florida, 3rd Largest State In Nation)
- Grants Approx. \$100,000,000 Annually: 300 Awards and > 500 Amendments)
- Incorporation Expertise
- Logistic: Equipment, Intervention, Inventory, Staff, Storage, and Transportation
- Performance: Funding, Measures, Negotiations & Evaluation
- Public Speaking: Presentations – Statewide, Regional, and National Conference
- Staff Selection, Orientation, Development, Supervision and Evaluation
- Strategic Imperative Planning Experience
- University: Administration, Research, Service, & Teaching

MARKETING AND SALES STRATEGY

In addition to marketing the consultative services of EASI to potential customers via mailing brochures, business cards, fliers, post cards and letters directly to procurement officers at private and public entities, the website (www.easillc.us) shall be utilized as a constant worldwide business presence for securing contracts. Also noteworthy is the fact that as a Certified Florida Minority Small Business Enterprise (MBE), EASI receives electronic notifications for Request for Proposals from the Florida Office of Supplier and Diversity (OSD) regarding contracting opportunities with state governmental agencies. Specifically, the Florida’s OSD Office requires MBEs to cross reference their products and services with United Standard Nation Products and Services Code (UNSPSC). The following are but a few of the UNSPSC areas identified by EASI as contracting interest:

- 80101506 Management Advisement;
- 80161602 Business Administration Services;
- 81131500 Methodology and Analyses;
- 81141500 Quality Control;
- 86101807 Management Manpower;
- 86101810 Personnel Skill Training; and
- 92101503 Community Outreach Program.

A SYSTEMS APPROACH:

EASI strongly advocates and proposes providing cost effective and efficient capacity-building or organizational development products and services at a fair market rate during the operational period of 1/1/2018-12/31/2018 by using a unique **Systems Approach** (L. von Bertalanffy, 1968) for establishing partnership, primarily for information brokering and referrals to local, state, regional and national governmental entities, nonprofits, funding sources, print broadcast and social media outlets, research investigations, as well as volunteer organizations. This System or Holistic approach to organizational development is entrenched in the notion that knowing where available products and services are and how to expeditiously obtain these invaluable resources at no cost or nominal rates has the potential of assisting businesses at all levels continuously become more successful. Hypothetically, if an individual or group has an idea for a business, but does not know how to get started, quick referrals to the U.S. Small Business Administration’s (<https://www.sba.gov/business-guide/>) and the local Florida Small Business Development Center (www.sbdcfamu.org) are surely helpful inexpensive options.

SWOT ANALYSIS:

Created by Albert Humphery of Stanford University, as a technique originally called a **SOFT** Analysis for the identification of why companies were failing, with the help of countless other highly debated scholarly contributors has evolved into a powerful planning tool used to understand and address the **Strengths, Weaknesses, Opportunities and Threat** (SWOT, 2005) related to a specific organizational project and or business. Hence, in this instance, a SWOT Analysis was utilized to assess the feasibility of information brokering, referrals and technical assistance to enhance, expand and improve the effectiveness of businesses of all sizes, but most especially, those of local individuals, non-profit organizations, minority-owned companies, women-owned companies, and veteran-owned businesses.

| <u>STRENGTHS</u> (Internal) | <u>WEAKNESSES</u> (Internal) | <u>OPPORTUNITIES</u> (External) | <u>THREATS</u> (External) |
|---------------------------------------|--|---|-------------------------------------|
| | | | |

A SYSTEMS APPROACH TO CAPACITY BUILDING AND COLLABORATING

| | | | |
|--|--|--|---|
| <ul style="list-style-type: none"> • >25 Years Experience • Budgets (Oper./Prog) • Business Plan Dev • Certified Florida MBE • Dist. Ed Expertise • Formal Ed (Ph.D.) • Fundraising • Grant/Contract Exp. • Incorporated FDOS • Leadership Theorist • MA Teaching • Passion (Businesses) • Regulatory Exp. • Research: Applied, Basic and Evaluative • Skilled IRS 1023 • Strategic Planning • Systems Approach • University Teaching | <ul style="list-style-type: none"> • Better Soc. Media Mkt. Needed • Limited Human Resources: Single Member LLC • Limited Op. Capital | <ul style="list-style-type: none"> • Employers 7,603 • External Funding: Popular • Information Brokering and Referral Opp. Endless • Leon Co. 290,292 • Local Firms 22,603 • Minority Firms • Some Customers Prefer Paying a Contractor • Veteran Firms • Women Firms | <ul style="list-style-type: none"> • Individuals, and nonprofits, and small businesses typically have limited funds to pay for products and services • Local and Nat. Small Business Dev. Agencies (FSBDC, SBA, Univ. Business Dept.) • Marketing Needed |
|--|--|--|---|

A SYSTEMS APPROACH TO CAPACITY BUILDING AND COLLABORATING

| EXCELLENT ANCILLARY SERVICES INSTITUTE, LLC. | | | |
|---|--------------------|---|---------------|
| OPERATING BUDGET STRUCTURE (NOT AMOUNTS) | | | |
| JANUARY 1, 2018 – DECEMBER 31, 2018 BUDGET NARRATIVE PROJECTION | | | |
| Note: The proposed budget line items reflect an description of expenditures associated with providing efficient and modest rate products and services for effective holistic organizational development (capacity-building). | | | |
| OBJECT | CATEGORY | DESCRIPTION | AMOUNT |
| 500 | External Funding | Contractual Products and Services | |
| 680 | Cost of Services | Variable cost associated with program planning/expansion | |
| | GROSS | FUNDING | |
| 679 | Adm. Cost | Expenditures for other cost incurred to administer products and services: clerical, fiscal mgt, and legal (fees) | |
| 655 | Equipment | Equipment: all-in-one desktop, laptop, multimedia projector, receipt scanner, & shredder | |
| 658 | Insurances | General and Professional Liability | |
| 679 | Material/Supplies | Materials/Supplies: binders, folders, data/flash drives, envelopes, ink cartridges pens, paper, staples & legal pads | |
| 679 | Postage | Postage: stamps and shipping cost | |
| 679 | Supplies | Refreshments+ Customer Appreciation | |
| 655 | Office Furniture | Desk, book shelf, chairs, conference table, lamps, | |
| 650 | Printing | Printing: contracts, banners, b-cards, brochures, fliers, invoices, post cards, posters, proposals, reports, table skirts | |
| 672 | Purchased Ser | Purchase Services: Continuous Registration and Attendance at Professional (R&D) Development Trainings | |
| 659 | Purchased Ser | Domain, Online Training Registrations, Website Hosting/Management and Social Media: Twitter, Facebook Fan Page, Blog, Youtube Video | |
| 654 | Rental | Rental Office Space & Storage | |
| 679 | Software | Microsoft Office 10, PDF Converter, & Invoices | |
| 659 | Purchased Ser | Contractual Services: independent sub-contractors | |
| 665 | Transportation | Transportation: in/out co. travel (e.g., gas, flights, & hotels) | |
| 654 | Utilities | Utilities: City of Tallahassee and Comcast | |
| | Expenses: | All Expenses | |
| | Pre-Tax Profit | Gross Profit | |
| | Tax | Income Tax | |
| | Net Balance | Profit | |

EVALUATION: A CONTINUOUS IMPROVEMENT MODEL

In addition to having a continuous improvement model, including weekly formative and an annual summative evaluation, as well as opportunities for intervention, EASI will collect data, analyze, and report to its clients, but will also study findings for ways to constantly improve products and services. Each customer shall be asked to complete and submit a satisfaction survey. Additionally, focus groups reflective of the customer base shall be utilized occasionally to test new products and services.

SUMMARY

In this era of accountability it has become increasingly important for successful agencies interested in accurately reaching their performance objectives to consider “qualified” professional business consultants such as Excellent Ancillary Services Institute (EASI), LLC. EASI proposed for Fiscal Year 2018 (01/01/18-12/31/2018) providing evidence-based and integrity-driven contractual services at a fair market rate on the business capacity-building services and products to a minimum of 100 (25 women, 50 minority and 25 veteran firms) individuals and businesses in Leon County, Florida with a population of 290,292 residents and 22,292 local firm.

As a competitive advantage over other organizational developers, the EASI Senior Consultant’s posted qualifications illustrate knowledge, skills and abilities (KSAs) acquired over the last few decades conducive to a sound, contextual, ethical, and scholarly foundation. Beyond the obvious KSAs, hopefully his synopsis, presence (should you meet him), and references will substantiate his other equally critical traits including, but not limited to character, chivalrousness, civility, critical thinking, decency, due-diligence, fairness (egalitarian), integrity, wisdom (Prov. 9:10), and a respect, as well as a celebration, for humanity relevant to your consultative needs.

EASI strongly advocates and proposes capacity-building or organizational development products and services at a fair market rate by using a unique **Systems Approach** (L. von Bertalanffy, 1968) for establishing local, regional and national partnerships information brokering, referrals, and training. This Systems or (holistic) approach to organizational development is entrenched in the notion that knowing where existing products and services are and how to expeditiously obtain these invaluable resources at nominal rates has the potential of assisting businesses at all levels continuously become more successful.

Albert Humphrey (2005) analysis was used as a powerful planning tool to assess the internal **Strengths**, **Weaknesses** as well as the external **Opportunities** and **Threat** (SWOT) related a capacity building business. Hence, the SWOT Analysis revealed the feasibility of information brokering, referrals and technical assistance to enhance, expand and improve the effectiveness of businesses of all sizes, but most especially those of local individuals, non-profit organizations, minority-owned, women-owned, and veteran businesses in Leon County, Florida.

In addition to having a continuous improvement model, including weekly formative and an annual summative evaluation, as well as opportunities for intervention, EASI will collect data, analyze, and report to its clients, but will also study findings for ways to constantly improve products and services. Each customer shall be asked to complete and submit a satisfaction survey. Additionally, focus groups reflective of the customer base shall be utilized occasionally to test new products and services.

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