ORGANIZATIONAL REVIEW, EVALUATION, STRATEGY, & IMPLEMENTATION PLAN SERVICES

800 E. OCEAN BLVD. * STE.108 * LONG BEACH, CA * 90802 * 714-904-8790 MKCIRCLE ENTERPRISES, LLC.

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ENGAGEMENT
SUMMARY

MKCircle Enterprises, Inc/CEO Institute supports executive leadership, mid-level managers, and team members with creating healthy organizational culture and structure. We help determine the critical factors that currently affect organizational structure and change. Additionally, as the overarching deliverables, we are a proven firm that specializes in helping small to medium non-profit and profit businesses with limited resources and limited funds to establish, strategic growth, engage stakeholders, evaluate operations, infrastructure development, fiscal operations, information technology, organizational culture reset, human resources, marketing/branding, public relations, employee training, expansion, and strategic planning to increase their bottom line.

This is the starting point for meeting your organizational goals and creating a sustainable future. Through this proposal, we seek to help you increase operational communication, productivity, and increased revenue by creating the foundation for a long-term method to identify the glaring bottlenecks that we know hinder your current structure, communication, and planning processes. In addition, we will work together to foster organizational cohesiveness, innovation, and change, offering measurable results with a visible, positive impact on your customers.

The core of our work is centered around organizational psychology and re-framing the tangible and non-tangible factors that may be blind-spots and bottlenecks. We see the unseen to support corrective actions in a cohesive and collaborative manner. Additionally, we support professional development for leaders to aid them in managing and leading a team working remotely and in person.

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When many of our competitors explain why you should hold on for "results one day" our partners and clients see "results on day one!"

Imagine results that not only show on PowerPoint slides and charts, but also on the smiling faces of team members and stack holders who ask, "where has the increase in productivity come from?"

Our organizational review, evaluation, strategy, and implementation plan engagement offer a full evaluation and review of the organization from the perspective of a strategic partner. We aim to support the whole organization from the board to the principals, mid-level leadership, and entry level staff. We want to invoke strategic thinking and foresight for effective planning and decision-making.

EXPECTED RESULTS
AND DELIVERABLES:

- Strategic Planning/Foresight – Summary & Outlined Plan 3-5 Years

- Foster organization cohesiveness, team engagement, and effectiveness internally andwith the larger community

- Optimized System Performance: Enhanced efficiency through streamlined IT processesand optimized system performance.

- Enhanced Employee Satisfaction and Retention: Increased employee satisfactionleading to higher retention rates.

- Finance/Accounting review to ensure compliance, reporting, effectiveness, SOPs,healthy financial picture and draw awareness to exposure & blind spots.

- Enhance and expand existing, strategic processing, and decision making

- Enhance the internal organizational culture by fostering empathy/diversity of thought, equity and acceptance

- Improved Operational Efficiency and Cost Savings: Streamlined HR processes resulting efficiency and cost savings

- Encourage Goal Setting/success points/mindset shifts Pivot management/planningprocesses in person and virtual environment

- Improve organizational effectiveness & staff training

- Marketing, branding, visibility, market positioning, narrative setting and organizationalengagement with customer bases and stakeholders

- Enhanced Security and Data Protection: Improved security measures reducing risk ofdata breaches.

- Measurable results with a visible, positive Impact

- And countless positive peripheral effects to build a strong effective team dynamic andenvironment

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IMPACTED AREAS:

Executive Leadership

- Effective Communication & Listening (Operational Styles/Leadership Language)
- Pivot management/planning processes in person and virtual environment
- Goal Setting/success points/mindset shifts
- Organizational effectiveness & staff training

Organizational Culture Review & Evaluation

- Empathy/diversity of thought, equity, and acceptance
- Organization cohesiveness, team engagement, and effectiveness
- internally and with the larger community
- Internal organizational culture

Human Resources

- SOP's, Compliance. Policies, Procedures, Internal Audits, Exposure/Vulnerability,Systems, Benefits, Hiring, Exiting, Leaves and Repoting

Fiscal Operations

- SOP's, GAPP Principals/Fund Accounting, Internal Audits, Exposure/Vulnerability,Systems, AP, AR, IRS Compliance, 990, Collections and Reporting

Information Technology

- SOP's, Storage, Procedures, Training, Hardware, Security, Internal Audits,Exposure/Vulnerability, Systems, Software and Repoting

Marketing/Branding

- Marketing, branding, visibility, market positioning, narrative setting, public relations andorganizational engagement with customer biases and stakeholders

Strategic Planning Summary & Outline

- Strategic Planning/Foresight Outlined
- Strategic Plan, strategic processing, and decision making

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Executive Leadership Discovery

We focus on communication and team interaction. Individual strengths can help the organization meet its goals. We assess each leader's Managing Up and Out position. When we think of Managing Up and Out, the first thing that may come to mind is supporting the leader, you report to, your counterparts, doing your job so the leader does not have to be concerned with your area, and sustainable results. These factors are good indicators for managing Up and Out. The factors that are missed or go unseen are the blind spots of clear expectations, knowing the pressures of your leader, pressures of your counterparts, and business issues as it pertains to capacity, engagement, and growth, especially when setbacks occur.

Additionally, we did some extensive research on leadership attributes, human behavior, and social psychology to form a Leadership Language that we as leaders can use to enhance our strategic decision-making, effective communication, narrative setting, social engagement and so much more.

The assessment tool we have created has shifted mindsets, induced Emotional Intelligence, and simply opened doors for leaders that were never open before. As you can tell, we are extremely excited about the professional and personal progress it has offered for so many.

We use this highly successful, psychologically, and research-proven tool to assess individual team members and the team to identify operational styles. The goal is to determine the 'WHO?' is on the team. How do people learn, communicate, process data, respond to pressure, respond to leadership, think strategically, and work collaboratively? The exercises are collaborative and offer a great deal of open communication and transparency. What makes this exciting is that the team is so engaged that no one realizes the assessment is helping them and the organization.

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The assessment results will be used throughout the training day. It is important to know who you are at work and how you can be a true asset to your organization. The team takes the Operational Style Assessment before the training. Lastly, we focus on the Emotional Intelligence competency self-motivation, and the emotional tendencies that guide or facilitate intention execution and accountability.

Tools we use of data gathering are but not limited to surveys, focus groups, 1:1 dyad, and qualitative observation by MKCircle team members. Each area report is presented to Executive Leadership, Board, and/or Stakeholders at the end of each review and evaluation. Actionable recommendations will be provided for addressing the identified gaps and vulnerabilities. The findings and recommendations will then be presented in the report, ensuring a clear understanding, and addressing any initial concerns.

Organizational Culture Discovery

When we think of business health, the first thing that may come to mind is profitability, future positioning, and sustainability. These factors are sure indicators for business stability and growth. The factors that are missed or go unseen are the health of the business culture, diversity of thought, and empathy & awareness as it pertains to organization capacity, engagement, and motivation, especially when setbacks occur.

We teach you how to read the Business Health barometer from the lenses of Cultural & Empathy Awareness. We focus on Emotional and Cultural Intelligence, Social Competency, Empathy, and emotional indicators that guide or facilitate reaching common goals.

Our work explores the business sector, individual behaviors, and the application of Cultural & Empathy Awareness as it pertains to a healthy organizational culture. One of the goals of the participants is to explore their current effect on people and challenge themselves to understand others, leveraging diversity, developing others, and political awareness.

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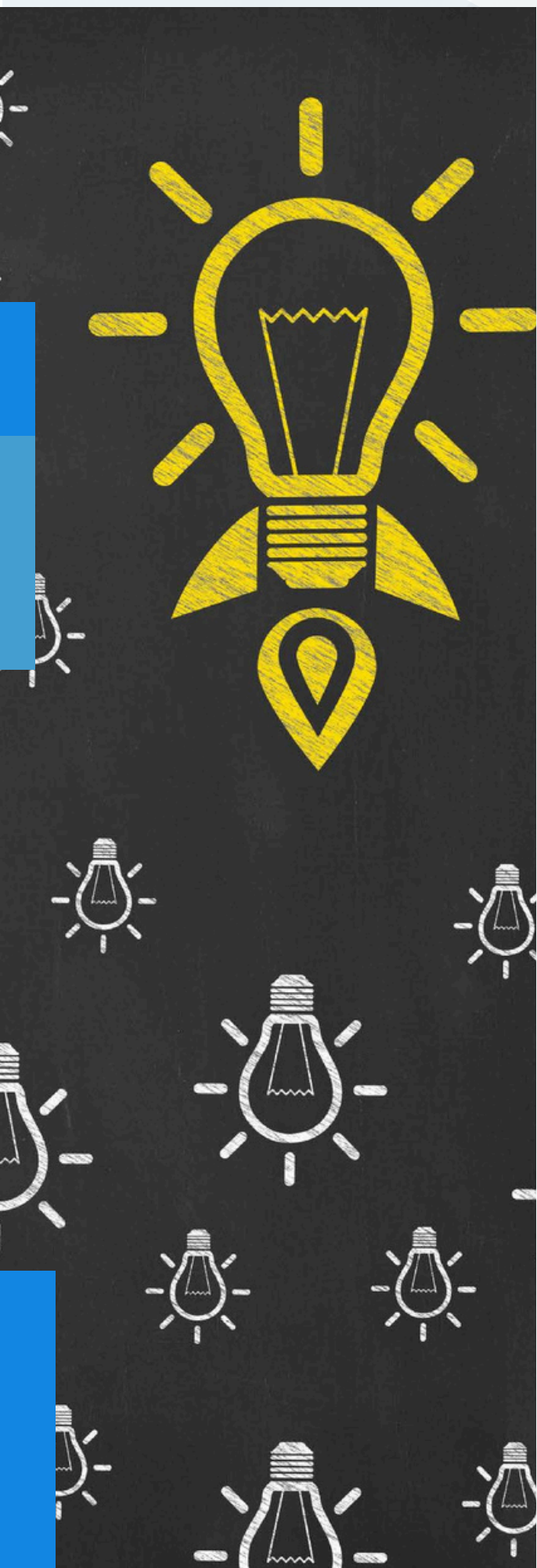
This exploration helps strengthen the individual and the organization by exploring how Emotional and Cultural Intelligence can be a highly effective tool to use in a high-pressure situation or personal biases. Also, it offers organizations the indicators that will support the balance of work/life for the employees.

This will offer the support needed to identify areas of lack of awareness, gaps in communication, and interaction. We help crack the code for understanding, development, engagement, motivation, and above all awareness.

Using information gathered from the previous meetings, executive leaders have a great deal of pressure to keep profits moving up and costs down. Positioning the organization for optimal growth comes with making the most effective decisions. We explore our assumptions, perceptions, and expectations as it pertains to the Fixed Mindset and Growth Mindset.

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Human Resources Discovery

Due to the high regulatory requirements, a comprehensive review and evaluation of an organization's Human Resources (HR) department and infrastructure is essential to efficiency and compliance. The review and evaluation will encompass standard operating procedures (SOPs), systems, process effectiveness, policies, employee handbook, hiring process, job descriptions, recruitment practices, onboarding procedures, employee benefits, payroll, staff training, professional development, organizational culture, and associated software, security, storage/cloud servers, and hardware. This review and evaluation are crucial for several reasons. It ensures compliance with legal and regulatory standards, optimizes HR processes for better efficiency and effectiveness, enhances employee satisfaction and retention, identifies areas for cost savings, and supports strategic planning and organizational growth.

The review and evaluation process will be conducted in three main phases: Planning/Preparation, Performing the Review, and Post-Review activities. The process will begin with a kick-off meeting with key stakeholders to outline the scope and objectives of the review. It is strongly recommended to include a local HR representative who can assist in gathering the necessary information. During this meeting, the tasks involved in the HR review will be briefly discussed, and any questions, concerns, or comments will be addressed. The scheduling of the post-review meeting will also be tentatively planned during this call or decided to be arranged later once the review is completed.

In the performing review phase, interviews will be conducted with HR personnel and relevant stakeholders to gain insights into the current HR systems and processes. Remote access will be utilized to gather detailed information and perform tasks aimed at identifying gaps, vulnerabilities, and opportunities for improvement. This phase will involve a comprehensive evaluation of the HR infrastructure, including the effectiveness of processes, policies, the employee handbook, hiring processes, job descriptions, recruitment practices, onboarding, employee benefits, payroll, staff training, professional development programs, organizational culture, and the associated software, security, storage/cloud servers, and hardware.

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After the review activities are completed, the post-review phase will commence. A detailed discovery report will be prepared, outlining the findings from the review, and highlighting any identified issues and risks. The HR review and evaluation will provide a comprehensive assessment of the current HR infrastructure, uncovering areas for improvement and offering actionable recommendations to enhance overall performance, compliance, employee satisfaction, and organizational growth.

Conducting this HR review and evaluation offers several key benefits. It enhances compliance by ensuring adherence to legal and regulatory standards, optimizes HR processes for greater efficiency and effectiveness, improves employee satisfaction and retention by identifying and addressing pain points, identifies opportunities for cost savings through improved resource utilization, and supports strategic planning by providing valuable insights into HR practices and their alignment with organizational goals.

Tools we use for data gathering are but not limited to current reports, audits, policies, procedures, surveys, focus groups, 1:1 dyad, and qualitative observation by MKCircle team members. Each area report is presented to Executive Leadership, Board, and/or Stakeholders at the end of each review and evaluation. Actionable recommendations will be provided for addressing the identified gaps and vulnerabilities. The findings and recommendations will then be presented in the report, ensuring a clear understanding, and addressing any initial concerns

Fiscal Operations Discovery

The Finance, Budget, and Accounting Review encompassed a comprehensive assessment of the organizations financial management practices. The audit aimed to ensure accurate and timely financial reporting, adherence to accounting standards, and effective utilization of funds. The audit process covered various areas, including fund accounting, standard operating. procedures (SOPs), timely financials, staffing, office culture, governmental funds, asset management, depreciations, general ledger (GL), accounts payable (AP), accounts receivable (AR), collections, accounting systems, security, and record keeping.

The audit of fund accounting examined the organization's financial transactions and records. related to different funds, such as operating funds, restricted funds, and grants. This ensured. that funds were properly allocated, tracked, and utilized according to the specified purposes. The assessment of SOPs focused on reviewing the organizations financial policies and procedures to identify any gaps or deficiencies. This helped establish standardized practices. for financial operations and ensured consistency in financial reporting.

Timely financials were a key area of evaluation to ensure that financial statements, including. income statements, balance sheets, and cash flow statements, were prepared accurately and within the required reporting timelines.

Staffing and office culture were assessed to determine if there were sufficient resources and qualified personnel responsible for fiscal management. The audit also examined the overall office culture to identify any factors that may have impacted financial operations and efficiency.

The audit specifically addressed governmental funds to ensure compliance with applicable. regulations and requirements related to the use of public funds.

All assets, including property, equipment, and investments, were reviewed to ensure. proper recording, valuation, and depreciation. This assessment helped safeguard the organizations assets and maintained accurate financial records.

The audit scrutinized the general ledger (GL), accounts payable (AP), accounts receivable. (AR), and collections processes to identify any irregularities, discrepancies, or inefficiencies in financial transactions and reporting.

The accounting system, including software and internal controls, was assessed for its reliability, security, and effectiveness in capturing and processing financial data accurately. Security and record keeping were evaluated to ensure that appropriate measures were in place to protect financial information and records from unauthorized access, loss, or tampering.

In summary, the Finance, Budget, and Accounting Audit covers a wide range of areas, including fund accounting, SOPs, timely financials, staffing, office culture, governmental funds, asset management, depreciations, GL, AP, AR, collections, accounting systems, security, and record keeping. The audit aimed to enhance fiscal management practices, ensure compliance with regulations, and strengthen the overall financial stability and accountability of the organization.

Tools we use for data gathering are but not limited to current and previous financial, reports, annuals audits, groups meetings, and 1:1 meeting. Each area report is presented to Executive Leadership, Board, and/or Stakeholders at the end of each review and evaluation. Actionable recommendations will be provided for addressing the identified gaps and vulnerabilities. The findings and recommendations will then be presented in the report, ensuring a clear understanding, and addressing any initial concerns.

Information Technology Discovery

An effective Information Technology (IT) infrastructure is crucial for any organization to ensure seamless operations, data security, and efficient service delivery. The review and evaluation of the IT infrastructure aims to identify existing gaps, vulnerabilities, and areas for improvement across various components of the IT ecosystem. This comprehensive review and evaluation is essential for several reasons, including ensuring data security to protect sensitive information from unauthorized access and cyber threats, optimizing performance to ensure that software and hardware systems operate efficiently and effectively, ensuring compliance with regulatory requirements and industry standards, identifying opportunities for cost savings and resource optimization, and future-proofing the IT infrastructure to ensure it is scalable and capable of supporting future growth and technological advancements.

The review and evaluation will be conducted in three main phases: Planning/Preparation, Performing the Review, and Post-Review activities. The process will begin with a kick-off meeting with key stakeholders to outline the scope and objectives of the review. It is strongly recommended to include a local IT person who can assist in gathering the necessary information. During this meeting, the tasks involved in the network review will be briefly discussed, and any questions, concerns, or comments will be addressed. The scheduling of the post-review meeting will also be tentatively planned during this call or decided to be arranged later once the review is completed.

In the performing review phase, interviews will be conducted with local IT resources and vendors to gain insights into the current IT systems and processes. Remote access will be obtained to gather detailed information and perform tasks aimed at identifying gaps, vulnerabilities, and opportunities for improvement. This phase will involve a comprehensive evaluation of the IT infrastructure, including standard operating procedures (SOPs), systems, software effectiveness, security, storage/cloud servers, and hardware.

After the review activities are completed, the post-review phase will commence. A detailed discovery report will be prepared, outlining the findings from the review, and highlighting any identified issues and risks. The IT review and evaluation will provide a comprehensive assessment of the current IT infrastructure, uncovering areas for improvement and offering actionable recommendations to enhance overall performance, security, and efficiency.

Conducting this IT review and evaluation offers several key benefits. It enhances security by identifying and addressing vulnerabilities to protect against potential threats. It improves efficiency by streamlining IT operations and optimizing the performance of systems and processes. It ensures compliance and risk management by adhering to relevant regulations and mitigating risks associated with IT operations. It identifies cost-saving opportunities through improved resource utilization and eliminating inefficiencies. Finally, it provides valuable insights that aid in strategic decision-making and future IT investments.

Tools we use for data gathering are but not limited to surveys, group meetings, remote access, and 1:1 dyad. Each area report is presented to Executive Leadership, Board, and/or Stakeholders at the end of each review and evaluation. Actionable recommendations will be provided for addressing the identified gaps and vulnerabilities. The findings and recommendations will then be presented in the report, ensuring a clear understanding, and addressing any initial concerns.

Marketing/Branding Discovery

We will start by defining a marketing strategy for the organization. The marketing strategy is a long-term, forward-looking approach and an overall game plan of any organization or any business with the fundamental goal of achieving a sustainable competitive advantage by understanding the needs and wants of customers.

The marketing strategy is its overall approach to gaining an advantage over competitors in the field, including the content, channels, campaigns, and marketing tools required to get there. Branding refers to a company's image or identity and the way it is presented to customers. A company's brand typically represents its values, brand voice and messaging. We work in the discovery of the organization's brand to expand the marketing.

Building the organizational brands is necessary to demonstrate how the organization is perceived. The leadership and staff must understand the mission and the brand. The mission and brand must be clearly identified.
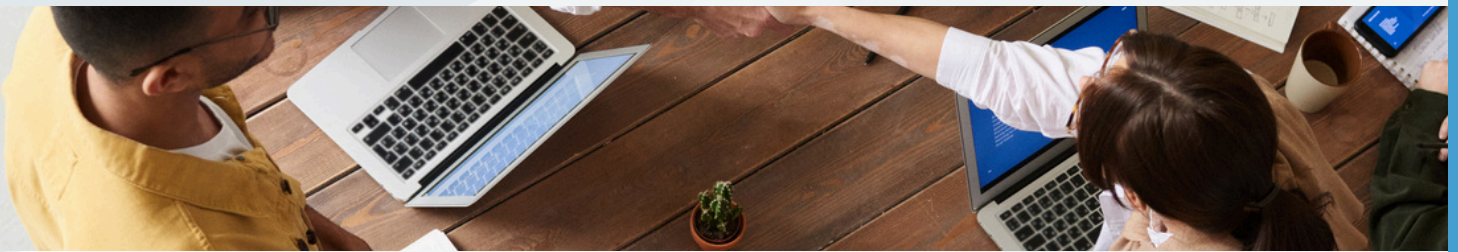
Nonprofit Marketing and Branding:
We start by determining the strength of the brand. A strong nonprofit brand can help you raise more money, increase social awareness, and build a solid reputation over a period. We support the leadership on how to be very intentional about internal and external marketing and branding. We start the dialog and discovery with our 10-step review which include the following categories of:

1. Positioning to standing out with small groups/sectors
2. Customer Trust and loyalty
3. Fundraising
4. Engagement
5. Target customers/audience
6. Storytelling/Innovation
7. Logo design/impact
8. Website
9. Marketing toolkit/Brand guide
10. Personalization/community outreach

For Profit Marketing and Branding:

With for-profit companies, we take the approach of understanding how the organization is educating consumers about what the product or service does and how you will benefit from it. We spend time understanding the target market and what media most responsive brand, products and/or service is. We start the dialog and discovery with our 10-step review which include the following categories of:

1. Overall business strategy
2. Target clients/audience
3. Target client group research
4. Brand positioning
5. Messaging strategy
6. Name, logo and tagline
7. Content marketing strategy
8. Website
9. Marketing toolkit/Brand guide
10. Strategies Implementation, track, and adjust

Tools we use for data gathering are but not limited to 10-Step Marketing and Branding review process, groups meetings, and 1:1 dyad. Each area report is presented to Executive Leadership, Board, and/or Stakeholders at the end of each review and evaluation. Actionable recommendations will be provided for addressing the identified gaps and vulnerabilities. The findings and recommendations will then be presented in the report, ensuring a clear understanding, and addressing any initial concerns.

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Strategic Planning Summary and Outline Discovery

Being Strategic is a key factor in business leadership. However, Strategy is a conscious choice of a growth mindset. Every business idea, investment, and/or collaboration must allow for consideration of a decision-making process. Being aware of strategic business and market movements can only make for effective decision-making.

A notable factor in strategy is awareness. An even more critical factor is emotional awareness. Often in business and even more often in small businesses, decisions are made emotionally and not strategically. We focus on these core factors: Emotional awareness, accurate assessment of strengths and limitations, and confidence in gathering information.

With the groundwork established, we collaborate with the executive and team on setting attainable individual, team, and organizational goals.

Strategizing how to meet those goals within a fluid team dynamic structure. Research shows that teams respond well to celebrating small accomplishments. The small victories! We work on goal-setting strategies such as the "Blue Ocean Strategy."

We offer simple yet practical strategies that can be used daily for simple tasks like making effective decisions. This section builds on the first sessions as well. We focus on communication, team interaction, and individual strength that can help the organization meet its goals.

Through this work we will outline the Strategic Plan of the Organization and start the process of a 3–5 year plan. Tools we use of data gathering are but not limited to previous plans, reports groups meetings, and 1:1 dyad. Each area report is presented to Executive Leadership, Board, and/or Stakeholders at the end of each review and evaluation.

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OUR DEDICATION TO OUR CLIENT AND RESULTS:

At MKCircle Enterprises, LLC. /CEO Institute, we redefine corporate evaluation and strategic planning by blending rigorous research data with genuine human engagement. Our commitment extends beyond mere analysis; it is about forging lasting partnerships aimed at cultivating organizational cultures, optimizing IT frameworks, enhancing HR efficiencies, stabilizing fiscal operations, refining marketing strategies, and empowering executive leadership. With a steadfast dedication to your success, we promise not just growth, but a legacy that transforms businesses. Partner with us and experience the difference of strategic foresight driven by empathy and expertise,

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THANK YOU

We look forward to being your partner!