



## Ryan Mulligan

PRINCIPAL CONSULTANT, Sidekick LLC.

### Hello!

Ryan is an empathy fueled strategist with 10+ years experience consulting on large-scale systems-change efforts across government, nonprofit, and healthcare sectors. An expert facilitator for design sprints, consumer research, strategic planning, and messy organizational resets. Ryan is, above all else, a genuine and empathetic partner for your team's success.

A former art and design professor who moved into community-led health improvement efforts after his son's diagnosis with profound autism. Ryan builds solutions WITH NOT FOR those impacted, bringing consumer and staff directly into the process ensuring sustainable results.

*"My mission remains to solve the problems of today and tomorrow so we all have more time and bandwidth to share with those we love. Less time awake at night, a better tomorrow, and more quality time with loved ones."*

### Past client examples:



Multi-year consultant for c-suite advising, team facilitation, leadership development, and co-created strategies for staffing, operational improvement and new program launches.



Patient/Provider experience design consultant for rural health strategies for Walmart. Managed field research staff and 50+ person design sprints in Georgia, Florida, Texas, and Arkansas.



Guide DFSC through creation, feasibility study, and launch of multiple programs from their strategic plan. Facilitate clients, staff, and board through design sprints and workshops.

Carol Ann and  
Ralph V. Haile, Jr.  
FOUNDATION

CINCINNATI  
DEVELOPMENT  
FUND

Developed business plans for future "regional philanthropic office." Led research and collaborative design process with 10+ funding stakeholders.



Oversaw strategic planning process for staff, board, and teen employees. Facilitated operational improvement workshops for all departments.



Quarterbacked operations improvements for medicaid managed care team experiencing gaps in performance, quality of care, and retention issues. \*Subcontractor of record for Cincy Ala Carte.

### References

Megan Zarnitz - VP, Programs & Strategic Initiative - Dress for Success Cincinnati, [mzarnitz@dfsc.org](mailto:mzarnitz@dfsc.org)

Danielle Minson - CEO, Jewish Federation of Cincinnati, [dminson@jfedcin.org](mailto:dminson@jfedcin.org)

Eric Avner - CEO, Waterloo Community Foundation, (formerly Haile Foundation) [eavner@gmail.com](mailto:eavner@gmail.com)

## Approach Overview

Based on your proposal we will plan an initial Board Retreat followed by a Strategic Planning Session with staff + Key Stakeholders. Our approach will begin with deep engagement with your Board and Executive Director (C-suite) through preparatory work that focuses on aligning their visions and ensuring their strategic priorities are aligned with FM's mission and values. This initial work will include interviews and surveys to capture perspectives and identify any key challenges or opportunities before moving into facilitation sessions.

**BOARD RETREAT** We will conduct a full-day, interactive Board retreat and **STRATEGIC PLANNING WORKSHOPS** workshop that centers on the core questions outlined in the RFP. These sessions will be designed to:

- Uncover shared values and aspirations, ensuring all stakeholders feel heard & involved.
- Explore current and emerging needs of the communities FM serves, fostering a clear understanding of how FM can best adapt to meet those needs.
- Assess the internal operations and culture, identifying potential changes needed to support future growth.
- Prioritize actionable strategies and goals to create measurable, sustainable impact.

Our facilitation approach will leverage principles of design thinking and change management to guide FM through a collaborative discovery process that fosters innovation, ensures alignment, and leads to clear, actionable insights. We will take the time to document and synthesize the inputs, developing a strategic vision and roadmap that integrates the perspectives of your board, staff, and clients.

Upon completion ~~we~~ we will deliver:

1. A **strategic plan** with clear, measurable goals for a 3–5 year period, aligned with FM's mission and future growth.
2. A **comprehensive program plan**, with specific strategies for enhancing FM's impact, particularly around Tamar's Center and Tau House and other innovations co-created based on business needs.
3. An **evaluation blueprint**, including a **dashboard** to measure progress and outcomes, ensuring that FM can track its success and adjust as needed.
4. **Assessments and Insights Report** - findings that don't fit neatly into strategic planning work, but often impact staff performance, culture, and processes that support/undermine the day to day work of FM.

Our goal is to create a collaborative and inclusive process that engages your Board, Executive Director, and staff while prioritizing the voices of the communities you serve. Through this engagement, we will ensure that FM's strategic plan is not only actionable but also reflective of your rich history and legacy.

ⓧ of all 3 phases. We are contracted for Phase 1 only

# Planning Process

## Phase 1: Board Retreat

Goal	Assess current status and define shared vision
Action	Partner with senior leadership team to plan and execute retreat including:
Prep	Research FM to understand structure, operations, staffing, and concerns. Plan retreat, define goals, develop exercises, confirm needs
Gather input	Design and manage survey tools for staff and leadership Interview staff and leadership team (4-6 hours)
Facilitate	Facilitate full-day retreat to celebrate achievements, assess risks, set vision
Report	Deliver report of findings and visioning documents from retreat

## Phase 2: Strategic Workshops

Goals	Generate well articulated solutions and opportunities that align prework
Action	Facilitate 1.5-2 day workshop of key stakeholders to develop strategic plan
Prep	Environmental Scans and operational assessments/ develop workshop Structure, prompts, and deliverables
Facilitate	Facilitate workshops (depending on client needs 1-2 day engagements) Facilitate Post workshop refinement session with key stakeholders
Report	Develop report, solutions, and learnings to share with board

## Phase 3: Action/ Opps Plan

Goal	Clear set of actionable recommendations for years 1-3, impact measures, & change documents
Report	Develop action/opps improvement plan with C-suite (additional stakeholders) + Impact measure plan + Theory of change

# High Level Process

BOARD RETREAT		STRATEGIC WORKSHOPS			ACTION/ OPPS PLAN
Where are we now?	Where are we going?	What could impact us?	What should we do?	Are we aligned?	How we will achieve this?
Celebrate Success	Mission & Vision Alignment	Values, Behaviors, Relationships	Set Strategic Priorities	Affirm Mission w/ new strategies	Action & Comms. Plan
SWOT Scan	How Might We exercises	Risk Analysis	CLEAR GOALS	Ensure Commitments	Capabilities/Budget
PESTLE Analysis	Future Casting	Environmental Scan			Impact Measures

We are contracted for phase 1 only as of now.