

***Dominion Education Services, LLC
1144 Meander Run Road
Locust Dale, VA 22948***

May 6, 2016

Response to Request for Quotes – Strategic Planning Services

Issued: April 15, 2016 by Piedmont Workforce Network

Introduction:

During the Fall of 2012, Dominion Education Services, LLC (DES) worked with the Piedmont Workforce Network (PWN) board to develop a Strategic Plan for a 3-5 year time-frame. During the process, the following statement was established to guide the planning process:

“To be a proactive partner with employers and economic development leaders by providing a qualified workforce that meets current and future job demand.”

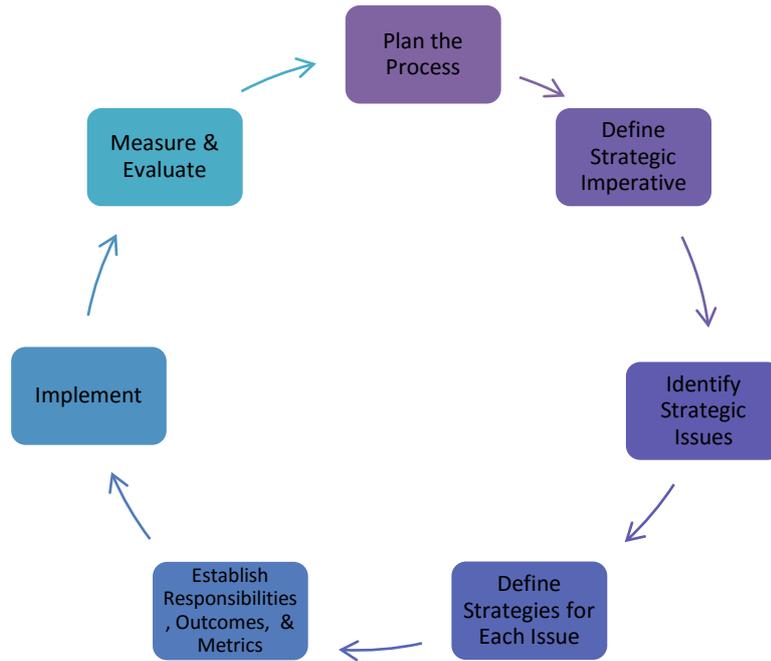
Using this statement as a guide, the PWN Council and Board established several action steps to move them forward. Those were in the areas of:

1. Creating a Unified Organization Culture,
2. Employer Engagement, and
3. Branding and Marketing.

Now, in addition to the work already being done, the PWN is tasked with being the “regional convener of workforce development activities in the region.” This new requirement codifies the responsibility of the Virginia Workforce Investment Boards (WIB) to “...develop, in collaboration with other workforce development entities in the region, a local plan for employer engagement.” Therefore, it appears that a focus must be on establishing policies and procedures that increase employer engagement with the services of the WIB. This added requirement will need to be critically addressed during the Strategic Planning Process for PWN.

Outlined in the following diagram is the process DES proposes to utilize for this Strategic Planning process. Key components of this process include planning, implementation, and evaluation. Since, 2013, PWN has been in the process of implementing the strategic issues established in the last Strategic Planning process. It is assumed that following the planning retreat of October, 2012, the PWN developed responsibilities, schedules, and metrics based upon the identified issues. The next phase of the process is to have PWN assess how the Strategic Plan established in 2013 is being implemented and whether or not the stated goals have been achieved. Based upon this assessment, a new plan to move PWN forward will be developed.

Strategic Planning Cycle: Planning, Implementation, and Review.



Scope of Provided Services

1. Review January 1, 2013-December 31, 2015 PWN Strategic Plan to evaluate goals and outcomes achieved.
 - a. A minimum of one meeting will be held at PWN headquarters to review the implementation of the Strategic Plan. It is suggested that this meeting be with staff and select members of the WIB board. A copy of the Strategic Plan will be provided to DES prior to the meeting so that the established goals can be compared to the work conducted and approved during the October, 2012 planning retreat.
 - b. Based upon this meeting, DES will provide a status report of the implementation of the Strategic Planning goals and strategies. This work will include the review of achievement of established goals and objective. This analysis will serve to as the foundation for the Strategic Planning retreat.
2. Design strategic planning work plan, including identification of performance during the previous strategic plan period, determination of staff roles, and identification of information required for process.
 - a. DES will utilize the current Strategic Plan as well any other performance measures to determine the level to which the plan is being implemented by the PWN staff. Outcomes will be assessed so as to identify any gaps in attainment.
 - b. A review of staff roles and responsibilities will be conducted to determine if the staff roles and responsibilities are aligned to the desired outcomes of the Strategic Plan.
 - c. A review of the implementation of the Strategic Plan will include an analysis of specific performance data that will then be included in the planning process.

3. Assess current status of PWN, including the development of SWOT analysis and information from internal and external stakeholders.
 - a. In conjunction with PWN, DES will develop an electronic Survey Monkey instrument that can be provided to various stakeholders to gather input. DES will work jointly with PWN staff to create the questions, collect information, and analyze results. It is recommended that this process be finalized prior to the retreat so as to have the results of the study in-hand for use during the retreat.
4. Plan and facilitate a strategic planning retreat with the Piedmont Workforce Network Board, Council members, and other stakeholders.
 - a. A minimum of one meeting will be held with the steering committee of the PWN Board to outline objectives for the strategic planning retreat. DES will work with committee members to establish clearly defined outcomes for the retreat and establish a time and location for the retreat. Additionally, a timeline for the completion of the Strategic Plan will be developed to include key dates for meetings, revisions, and implementation. Current workforce data, including the new Code of Virginia requirement, will be examined and included in the retreat development.
 - b. Based upon the review of the current Strategic Plan, the analysis of data, and the established goals and desired outcomes, DES will develop the format and content requirements for the Strategic Plan to be reviewed by PWN designees prior to the retreat.
 - c. DES will coordinate the strategic planning retreat by providing materials for retreat participants to review prior to the retreat, experienced facilitators to lead discussions and gather input, and staff to record meeting notes and discussion responses.
5. Hold strategic planning retreat and document meeting outcomes and next steps, including the final strategic plan.
 - a. DES will facilitate the retreat and lead all discussions.
 - b. DES staff will take notes during retreat and any other meetings and provide summaries to PWN within 5 working days of the meeting. These summaries will include defined action steps along with a timeline for completion.
 - c. The resultant Strategic Plan will be written to include input received during the evaluation of the current plan, the strategic planning process, implementation plans, metrics, and timelines for implementation and evaluation. DES will work with PWN staff to establish dates for submission of the first draft and presentation for first review by the Board. Following the review, DES will make the necessary revisions to be presented by a pre-determined date.
 - d. DES will provide staff to attend all meetings held as part of the strategic planning process, and provide summary notes within 5 working days of the meeting.

Estimated Timeline

- May 6, 2016 RFP due
- June
 - Review of current strategic plan and pertinent workforce data
 - Meeting with the steering committee of the Piedmont Workforce Network Board to outline objectives for the strategic planning retreat
 - Draft of retreat agenda presented for review
 - Analysis of training opportunities and survey of employers through the Chambers.
- July/August
 - Retreat held (date and time TBD)
- Late August
 - First draft of plan with metrics presented for review
 - Meetings attended and notes recorded
- September
 - Strategic Plan revised and presented

Work Products

- Revised strategic plan with metrics and plan for implementation
- Status report of implementation of current strategic plan
- Survey results gathered by PWN with analysis by DES
- Meeting notes
- Draft strategic plan with metrics

Costs

- Meetings & Analysis
 - DES will work with PWN staff to thoroughly analyze the existing Strategic Plan to ascertain how well PWN achieved the metrics previously established. A report will be provided to all PWN Board and Council members prior to the retreat.
 - DES staff will attend all meetings related to the planning, development, and revision of the Strategic Plan. Meeting notes will be taken and submitted within 5 working days of each meeting. Included is all associated travel costs for staff.
 - DES will work with PWN to develop a survey using Survey Monkey that will be provided to the various Chambers of Commerce so that employer input into the Strategic Plan can be gathered.
 - DES will provide a draft of the Strategic Plan following the retreat and will revise the plan after review by PWN so as to provide a final plan for PWN Board approval.

Cost: \$4500

- Retreat
 - DES will provide facilitators and staff to organize and conduct the retreat
 - DES will provide all materials and supplies for the retreat
 - DES will take meeting notes and collect input for inclusion in the strategic plan
 - Food and refreshments are not included in the costs
 - Cost of the meeting space is not included
 - Cost is based upon number of Workforce Board members (34) as maximum number of participants
 - Cost: \$3500

- Materials and supplies
 - DES will provide meeting notes electronically and in hard copy
 - DES will provide all Strategic Plan drafts and final revisions electronically and will provide a minimum of two hard copies
 - Cost: \$1,000

Total Project Cost: \$9,000

Qualifications and Capacity

Dominion Education Services has the capacity to provide experienced professionals to organize, facilitate, and develop a needs-based and outcome-driven strategic plan for the PWN. The staff provided by Dominion Education Services, LLC brings a wide range of workforce and education experiences to the planning process. Both have participated in the strategic planning process with non-profit boards and as part of their own professional responsibilities.

Mr. James has assisted in the development of strategic plans in private and non-profit organizations. He has served previously on the PWN board and is very familiar with the Workforce Investment Act and the operation of the WIB. Mr. James represented both Germanna and Madison County in the TJPED Economic Development study conducted by Younger and Associates. In his role as Dean of Business and Workforce Services, Mr. James worked closely with employers and business organizations to develop training opportunities that matched the needs of the communities served by Germanna Community College.

Dr. Roger Collins currently serves as the Executive Director of the Virginia School and University Partnership. He has extensive experience, as evidenced by his Vitae attached, working with educational partners to expand training for educators. Dr. Collins resides in Nelson County and is very familiar with the workforce needs of the PD-10 region. Further, Dr. Collins will be a valuable asset to speak to the various programs for training offered by K-12 schools.

Biographical sketches are included and additional information and references are available upon request.

References

Madison Emergency Services Association
Ms. Jennifer McLeod, Executive Director
534 S Main St
Madison, VA 22727
(540) 948-4427

Clearpoint Credit Counseling Services
Christopher J. Honenberger – President and Chief Executive Officer
8000 Franklin Farms Drive
Richmond, VA 23229
(800) 750-2227

Germanna Community College
Dr. Jeanne Wesley, Vice-President
Ms. Denise Guest, Dean Professional and Technical Studies
10000 Germanna Point Drive
Fredericksburg, VA 22408-9543
(540) 891-3000

Biographical Sketch

W. Russell James
Chief Operating Officer
Dominion Education Services, LLC
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Locust Dale, Virginia 22948
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Mr. Russell James has over 40 years of experience in a variety of business and educational situations, including serving 5 years at Germanna Community College, most recently as Dean, Business & Workforce Services. Prior to his work at Germanna, Mr. James owned a successful manufacturers representation company for 10 years, Preferred Suppliers Network, was National Sales Manager for a pharmaceutical packaging company, and Director of Logistics for a pharmaceutical company. In these various roles he has worked with a variety of teams to develop mission & vision statements and strategic plans to support the mission of the organization, most recently at Germanna Community College. Mr. James is now Chief Operating Officer for Dominion Education Services, LLC, a provider of education research, analysis, and consulting services.

Mr. James received his B.S. in Industrial Engineer from Auburn University and his M.B.A. from Lynchburg College. When he joined Germanna, he also received a Professional in Workforce Development certificate from the University of Virginia.

Mr. James previously served on the boards of the Germanna Community College Educational Foundation the Madison County Education Foundation. Currently Mr. James is Secretary of the Blue Ridge Foothills Conservancy.

Roger D. Collins

Vitae

51 Cedar Meadow Court
Nellysford, Va. 22958
434-361-1023 Home
434-996-5897 Cell Phone
collins@virginia.edu

Academic Degrees Earned

Doctorate, George Washington University, Washington, DC. 1997
Master of Science, University of Virginia, Charlottesville, Va. 1986
Bachelor of Science, James Madison University, Harrisonburg, Va. 1983

Research Interests and Expertise

- Professional learning trends and programming
- Action research related to teaching pedagogy, curriculum and leadership
- School improvement models
- Mentorship and employee performance coaching
- Brain compatible research as applied to student and adult learning
- International education - global awareness, competence and leadership
- Asian culture, language and traditions

Professional Experience

Virginia School and University Partnership

Present - Executive Director of 67 member public school consortium group

James Madison University

Present - Associate Professor of Educational Leadership
Harrisonburg, Va.

University of Virginia

Educational Outreach Coordinator for the Asia Institute in the College of Arts and Sciences,
Charlottesville, Va.

School superintendent, assistant superintendent, principal and teacher in various schools
1983-2014

University of Virginia

2008 – 10 - Adjunct professor, School of Continuing Education and Professional Development,
Charlottesville Va.

Shenandoah University

2006 – 12 - Adjunct professor, School of Education, Winchester Va.

Graduate Level Teaching

School Curriculum and Evaluation
Public School Administration
Personnel and Human Resources
School Law
School Finance
Other Elective Courses in Education

Professional Presentations and Other Relevant Experiences

Virginia Association of School Personnel Administrators Conference. Presentation - *Enhancing Employee Performance with Constructive Coaching*. November, 2014.

National Endowment for the Humanities and University of Virginia Bridging Cultures Symposium. Organized and facilitated a group of 35 community college professors during 5 days of intense professional development sessions directly related to greater Asia. August, 2014.

Japanese Language Education Global Articulation Project (J-GAP) advisor and reader. June, 2014.

China As a Global Partner Program. 30 Virginia School Superintendents and other leaders traveled to China to investigate, present and further develop educational partnerships. 2010.

India As a Global Partner Program. 30 Virginia School Superintendents and other leaders traveled to India to investigate, present and further develop educational partnerships. 2008.

Virginia School Boards Association Annual Conference. Presentation - Goss, III, John R., Pamela Stockinger, and Roger D. Collins. *Cohort Programs and Teacher Empowerment*. Williamsburg, Va. Virginia State School Boards Association, 2007.

Virginia Association of Secondary School Principal's Annual Conference. Presentation - *The Power of Mentoring and Coaching*. Williamsburg, Va. 2006.

Emerging Leaders Conference. Presentation -
What School Superintendent's Desire When Interviewing Applicants to Fill Leadership Positions. Hot Springs, Va. Virginia Association for Elementary School Principals, 2005.

Awards and Recognition

Regional School Superintendent of the Year. 2010.

Nelson County *You Made the Difference Award.* 2008.

Fluvanna County Parks and Recreation *Partnership Award.* 1998.

Workshops Conducted

- Brian Compatible Research
- Critical Thinking and Cooperative Learning
- Communication Awareness
- Block Scheduling for Comprehensive High Schools
- School Improvement and Effective Schools Research
- New Teacher Induction
- Teaming and the Power of Working Together
- School Safety, Crisis and Security Awareness

Public School Experience

Superintendent, Nelson County Public School Division, Lovingson, Va.
August 2003 – June 2014

Assistant Superintendent of Schools, Louisa County Public School Division, Mineral, Va.
July 1998 – August 2003

Assistant Principal and Principal, Fluvanna County High School, Fluvanna County Public School Division, Palmyra, Va.
July 1992 – July 1998

Teacher, Greer Elementary School, Albemarle County Public School Division, Charlottesville, Va.
August 1987 – July 1992

Graduate Assistant Instructor, University of Hawaii, Honolulu, Hi.
July 1986 – August 1987

Graduate Assistant Instructor, The University of Virginia, Charlottesville, Va.
August 1984 – July 1986

Teacher, Henley Middle School, Albemarle County Public School Division, Charlottesville, Va.
August 1983 – August 1984

Professional Affiliations

Virginia Association of School Superintendents – Former Board of Directors Member and
Former Region Chairman

Virginia-School University (UVA) Partnership – Former Chairman and Board Member

Blue Ridge Virtual Governor’s School – Former Board Member

Piedmont Regional Educational Program – Former Board Member

American Association of School Administrators – Former Member

Virginia Association of School Business Officials – Former Member

Virginia High School League – Former Regional Chairman and member

National/Virginia Association of Secondary School Principals – Former Member

National/Virginia Association Supervision and Curriculum Development – Member

Rotary Club of Nelson – Member

Other Training

Employee Performance Consultant, 2014 – continuing.