

WDC Strategic Planning Facilitation Services Proposal

I propose that the work proceed in four phases:

1. Preparation/Initial Reconnaissance,
2. Collaborative Analysis,
3. Strategic Planning Retreat and
4. Draft and Final Strategic Plan Writing/Presentations

It is important to note that each of these phases should be highly collaborative with WDC leadership and designated staff, so there is full engagement and ownership of the Strategic Plan process and product. The hallmark of any successful strategic plan is the full participation and engagement of management and senior staff in its production.

1. Preparation/Initial Reconnaissance

This first phase would include a project scoping meeting with key WDC leaders, including the WDC Executive Director, the WDC Chair and Vice-Chair, and any other WDC members and staff with fundamental responsibilities for the strategic plan development. This phase would include a critical review and discussion of the WDC Strategic Plan 2020 document, approach and outcomes, with an emphasis on building upon previous successes while also reassessing less productive outcomes. The recent and very comprehensive analysis of Statewide Business Services Framework Plan would be a central lens through which to conduct this critical review, since it is highly specific and addresses the range of capacities at the various AJCs.

This phase would also include a candid discussion of desired scope and level of detail for the next strategic plan. Effective strategic plans do not need to be lengthy or touch upon every aspect of an organization's activities. The important thing is to identify where the organization wants to be in five years and define the short-term (within two years) and medium-term actions to get there.

Outputs:

- Scoping Meeting Summary
- Draft Strategic Plan Outline

2. Collaborative Analysis

This phase would add clarity, perspective, and detail to the primary issues identified in the first phase while setting up the content and approach for the WDC Board retreat. In particular, it would examine the degree of *alignment* between the 2020 Strategic Plan and the actual provision and delivery of services at the American Job Centers. The key activities would include in-depth interviews with selected WDC members from the business community, and with selected AJC staff in different locations. The two sets of interviews would include a combination of overlapping and unique questions designed to elicit how effectively the primary WDC goals and objectives are being communicated and implemented. Following these interviews, an online survey would be developed and sent to all WDC members with a series of questions designed to see how well they

think the WDC is accomplishing its mission, how effective they think the current WDC committee and meeting structure is, and where they see the greatest opportunities for improvement.

Outputs:

- Interview Guides and Summaries
- Survey Instrument and Results
- Analysis/Synthesis of Responses from Interviews and Survey
- Primary Issues and Themes for Strategic Planning Retreat

3. Strategic Planning Retreat

The results from the first two phases would set the stage for designing the WDC Board Strategic Planning Retreat in either one or two sessions in October 2019. The retreat would include a combination of plenary and small-group discussions focusing on a review of the organization's previous Strategic Plan along with its recent accomplishments, challenges, and opportunities as illuminated by the first two phases. The emphasis at the retreat would be on testing for consensus around a succinct set of highly focused, relevant, and instructive goals and objectives to guide the WDC over the next five years, with a particular emphasis on near-term actions over the next two years.

Outputs:

- Strategic Planning Retreat Agenda and Supporting Materials
- Revised Goals, Objectives, and Actions
- Retreat Summary

4. Draft and Final Strategic Plan/Presentations

This phase will begin with a concise draft Strategic Plan for internal review by the WDC Executive Committee, Executive Director, and other WDC Board members or staff whom they delegate. After addressing internal review comments, a Final Draft Strategic Plan will be produced for review and approval by the full WDC Board. I will also prepare a short presentation describing the strategic planning process and key outcomes for use at WDC Board and Subcommittee meetings, and other meetings as necessary.

Outputs:

- Draft Strategic Plan for Internal Review
- Revised Draft Strategic Plan for WDC Board Review
- Final Strategic Plan
- Powerpoint Presentation

TOTAL FEE FOR SERVICES: \$14,764