



**RE: Response to Request for Strategic Planning Services**

Mr. Ben Bowman  
Executive Director  
Central Virginia Workforce Development Board  
Delivered by e-mail

November 17, 2020

Dear Ben:

Attached please find our proposed response to your request for strategic planning and local workforce development area plan services. This proposal includes a proposed scope of work, qualifications, and proposed budget to facilitate strategic planning for the Central Virginia WDB. My resume is also attached, which includes client references.

Strumpf Associates is a small, woman owned firm focused on helping organizations in the public sphere transition how they deliver services to being more innovative, customer focused, and data driven. We have worked in the field of community, economic and workforce development for over 35 years. Over the past 35 years we have helped workforce boards and partner agencies develop, design, execute and continuously improve services to adults, dislocated workers, and youth. We have worked with over 300 workforce boards across the United States consulting on a variety of areas, including facilitating comprehensive strategic planning processes. Strumpf Associates has provided consulting services to six of the fifteen workforce boards in Virginia.

I look forward to hearing from you. Please feel free to contact me with any questions regarding the attached scope.

Sincerely,  
*Lori Strumpf*  
Lori Strumpf  
President

In compliance with this Request for Proposals and all conditions imposed therein, the undersigned offers and agrees to furnish the services in accordance with the attached proposal or as mutually agreed by subsequent negotiation. By my signature below, I certify that I am authorized to bind the Vendor in and all negotiations and/or contractual matters relating to this Request for Proposals.

FULL LEGAL NAME OF VENDOR: Strumpf Associates: Center for Strategic Change  
FED ID: 521668661  
DATE: November 17, 2020  
ADDRESS: 1717 K Street, NW, Suite 900, Washington, DC  
20006  
PHONE: 202.872.0776 (W) 202.257.2971 (Cell)  
E-MAIL ADDRESS: [strumpfctr@aol.com](mailto:strumpfctr@aol.com)

Name and Title: Lori Strumpf, President  
*Lori Strumpf*

**SCOPE OF SERVICES, DELIVERABLES, SCHEDULE, AND BUDGET  
FOR STRATEGIC PLANNING FOR THE  
CENTRAL VIRGINIA WORKFORCE DEVELOPMENT BOARD  
From Strumpf Associates: Center for Strategic Change  
November 17, 2020**

**SECTION I: STRATEGY DEVELOPMENT AND STRATEGIC PLANNING**

Strumpf Associates will assist the Central Virginia Workforce Development Board with the development of a comprehensive strategic plan that will help to sustain growth and provide direction to the organization over the next three years. This will be a robust process that results in a plan that will provide fresh strategies for the organization to be responsive to a dynamic, changing environment. The process will be an inclusive one, engaging key community stakeholders, board members, and staff. This process results in a strategic plan that staff, stakeholders, the Workforce Board, and the community can connect with and support.

To accomplish this, Strumpf Associates will work with the CEO to identify a Strategic Planning Committee. The Strategic Planning Committee will be made up of 12 to 15 members, inclusive of members of the Workforce Board, the CEO, other leadership-level staff, community members, partners, and other key stakeholders if appropriate.

The approach to strategic planning is designed to ensure that the Committee is provided three key things:

- Data to drive decision making.
- Time to allow for deliberation and reflection.
- Information on best practices based on Strumpf Associates thirty-five years of experience leading similar organizational and community strategy development processes, and development of proven strategies throughout the country.

The process is designed to accomplish the following:

- Engage the board, staff and stakeholders in a robust process;
- Create a strategy and identify strategic priorities that guide the organization over the next few years; and
- Obtain commitment at all levels that the direction identified is the direction all are committed to work toward.

The outcome is to create a strategy and strategic plan document that will be used as a roadmap to guide the organization for the next 3 years. The plan will also inform the development of the Local Workforce Area Plan due to the state by March 1, 2021.

Prior to the first meeting of the Committee, Strumpf Associates will work with the Chief Executive Officer of the organization to collect data and research that will inform the discussions. The information will include the current strategic plan and accomplishments to date, customer satisfaction data, and data related to demographics of the population both current and future projections. Lori Strumpf will also convene a conference call with the officers of the board and the CEO to discuss the proposed approach if appropriate.

### ***Philosophical Approach***

Strumpf Associates' work with organizations is based on the belief that strategic thinking and strategic planning, while inter-related processes, are distinctly different. We start our process by promoting strategic thinking versus plan development. Based on a variety of new models and approaches to strategic thinking and planning, we make the distinction this way:

- The role of strategic thinking is to seek innovation and imagine new and very different futures that may lead the organization to redefine its core strategies.
- Strategic planning's role is to realize and to support strategies developed through the strategic thinking process and to integrate these back into the business.
- We see the planning process itself as a critical value-adding element as opposed to focusing on the creation of the plan as the ultimate objective.

Strumpf Associates uses a nine-step planning process that promotes strategic thinking and planning. Steps 1 thru 7 are conducted during the Strategic Planning Committee meetings. Steps 8 and 9 are done by Strumpf Associates with the information from the Committee and presented for review to the team.

#### **Step 1: Conduct an Environmental Scan**

- Review of Data Related to the Current Environment
- Review the Givens – constraints the organization works under (e.g., legislative, political, societal constraints)

#### **Step 2: Identify Strategic Imperatives Derived from the Environmental Scan**

#### **Step 3: Conduct a SWOT Analysis**

- Analyze the organization's current strengths, weaknesses, opportunities and threats in relationship to the strategic imperatives

#### **Step 4: Identify Primary Customers**

#### **Step 5: Analyze Gaps**

- Using the SWOT, analyze the gaps between where the organization is now and where it needs to be.

#### **Step 6: Establish Goals**

#### **Step 7: Identify Core Business and Establish/Review Current Mission, Vision, and Values**

- Identify what the organization can be the very best in the world at doing and the competitive niche advantages

#### **Step 8: Develop Action Plan**

- Identify key strategies
- Develop measures of success with metrics

**Step 9: Construct the Strategic Plan Document.** The document includes the following sections:

- Introduction. This section makes the compelling case through data (environmental scan) that leads into the vision, mission, and strategic goals.
- Vision, Mission and Values.

- Strategic Goals and Key Objectives.
- Operating Principles. This section identifies the principles that define the way the organization approaches the operational aspects of their daily work, in accordance with the values, goals, and strategies.
- Desired Outcomes of the Plan. This section includes expected outcomes at three years as well as the indicators to be measured.

Once the plan is completed, the work is not over. While the approach to strategic thinking and strategy deployment for the organization has been developed, it takes constant focus to ensure deployment, monitoring and constant evolution of the plan.

The process outlined above is designed to answer several key strategic thinking and planning questions, including:

- Are we doing the right thing? And are we doing it right?
- What impact do we want to have on our customers?
- What impact do we want to have in the community?
- What business is the organization in? What business should the organization be in?
- Who is our primary customer(s)?
- What are the future opportunities?
- What strategic alliances need to be built?
- What do our stakeholders expect?
- What do our customers expect?
- What do we do well that we need to continue to do?
- What do we need to do differently?
- How do we leverage our new opportunities?
- What core competencies and knowledge does the organization need to survive and thrive into the future?

The following are the core activities required to accomplish the steps outlined above:

- Work with leaders and staff to collect and analyze current data relevant to the community and to current organizational activities, such as demographics of the region, legislative direction of the state and federal government, best practices, and other relevant data and comparison benchmarks to create a framework to work from for meetings.
- Facilitate the first meeting of the Strategic Planning Committee to provide an overview of the statistical data part of the environmental scan information to date and to begin to identify the strategic imperatives they see both in the short and long term. (9:00 to 12:00)
- Facilitate the Strategic Planning Committee for up to 3 additional meetings (½ day each – 9 to 12:00) to complete the goals and strategies.
- Conduct up to 3 focus groups of up to 90 minutes each with invited customers (businesses in one and job seekers in another), key stakeholders (e.g., community members, not on the Committee) as part of the environmental scanning process and write a focus group report.
- Draft the strategic plan for review by the Committee based on the work of the Committee at meetings.
- Present to the full board and CEO Consortium for approval.

In conducting these core activities, Strumpf Associates role will be to:

- facilitate the process of the meetings by ensuring clarity of purpose and direction,
- facilitate focus groups and other engagement activities,
- produce meeting notes and focus group report,
- provide technical expertise by asking questions that move the agenda forward,
- provide advice on lessons learned in similar work elsewhere,
- provide coaching to the staff,
- help in the development of various products,
- produce a final strategic plan for the organization which includes measurable outcomes of the accomplishments of the strategy.

The organization's role will be to:

- provide logistical support i.e., setting up the meetings, getting out notices, etc.
- gather data required.
- identify a contact person for Strumpf Associates.
- assist in the development of various products.

### ***Possible Phase II***

The activities above do not include creating the full business plan required to implement the strategic plan once approved. Development of a business plan (sometimes called an operational plan) would be a Phase II of this work. The Business Plan is created through three (3) facilitated meetings with the organization's Leadership Team. More detail can be provided on the contents of the Business Plan if you wish to pursue. In general, a Business Plan is the implementation plan that identifies process owners, timelines, allocates resources related to the key strategies in the strategic plan, and creates the measurement and data collection system for the outcomes. A price for the work for Phase II is **not** included in the proposed budget.

### ***OUTCOMES, DELIVERABLES AND RESULTS***

The outcome of the process will be to provide a clear vision and action plan for the future by thinking through the organization's core business within the context of current and future political, economic, and societal challenges. Process outcomes include:

- Create a process that helps the organization establish a new way of thinking and doing with regard to delivering services to customers and the community.
- Identify strategic priorities to guide the organization for the next three years.
- Create an engagement strategy for partners and customers.
- Ensure that strategies are based on data and evidence based best practices across multiple related fields, including community development, economic development, and workforce and talent development.

There will be three deliverables:

- The SWOT Analysis and a discussion framework for the Committee meetings.
- A focus group report.
- A strategy that is codified into a strategic plan and outcomes document.

## ***POTENTIAL SCHEDULE FOR DEVELOPING THE STRATEGIC PLAN***

The schedule will include the following tasks.

### Month 1 – December

- Confer with Leaders of the Board and CEO about the process.
- Identify Strategic Planning Committee members. Strumpf will draft an invitation letter and Committee Charter for the CEO's use.
- Begin environmental scan with statistical data collection and analysis.

### Months 1, 2 and 3 – December 2020, January, February 2021

Schedule for meetings will be determined with the CEO. All meetings are 3 hours and will be conducted virtually.

- Conduct initial meeting of the Strategic Planning Committee to begin identifying strategic challenges and to begin SWOT analysis.
- Conduct second, meeting of the Committee to continue SWOT and to begin to define what needs to be accomplished over the next 3 years for the organization.
- Conduct third meeting of the team to use data from the focus groups to refine goals and strategies. Begin to define vision, mission and values.
- Conduct fourth and final meeting, **if needed**, of the team to finalize the plan and discuss next steps. Next steps include sending a final draft to the team members for final review and comment.

### Between December and the end of January 2021

- Conduct 3 Focus Groups (virtually): Dates to be determined
  - #1: Partners and other key stakeholders
  - #2: Employees
  - #3: Jobseekers

### Month 4 (dependent on the scheduled WDB/CEO meeting in February 2021)

- Present the plan to the WDB and CEO Consortium for review and adoption.

## **SECTION II: POSSIBLE SCHEDULE TO COMPLETE THE LOCAL AREA PLAN**

Strumpf Associates will take the lead in organizing and drafting the response to the state's Local Area Workforce Plan. Using the strategic planning process and the resulting strategic plan, we will develop the content for the Local Area Workforce Plan based on the template provided by the Virginia Community College System's for format and guidance. There may be specific sections related to local area metrics or other information that Strumpf Associates will need a staff person's help to obtain. Overall, the process specified in this Scope of Work appears to align with the type of information being requested in the just released Development Guidance for the Local Area Plan.

The timeline below is presented for review. Consultation with the CEO and other leadership of WDB will be conducted to finalize a schedule.

- Late January 2021- Based on the almost completed (but not yet approved) strategic plan, begin drafting sections of the Local Area Plan.

- By end of January – identify areas that may need additional content from staff of the WDB.
- February 5<sup>th</sup> – Post for review and public comment until February 19<sup>th</sup>.
- February 23<sup>rd</sup> - Summarize comments for review and submit final plan for approval
- March 1, 2020 – Submit to the State
- Between March 1 and March 31, 2021 be available to make any revisions based on feedback from the state’s evaluation.

### **SECTION III: STATEMENT OF QUALIFICATIONS, CORPORATE SUMMARY AND EXPERIENCE**

Strumpf Associates: Center for Strategic Change (SA) is a Washington, DC-based firm that provides organizational change consulting and facilitation to a variety of institutions, including community-based organizations, local governments, city and county councils, schools, social service agencies, and workforce entities. SA works nationwide as an organizational change consultant, helping public institutions and multi-agency initiatives develop integrated service delivery systems, become more business-like in process management and results, and transform organizations to quality managed workplaces. SA helps not for profit and government organizations improve the quality of their delivery systems and services by becoming high performance workplaces. We provide technical assistance, leadership training, partnership facilitation, creative problem solving, and practical research linked to best practices - all designed to improve customer satisfaction.

Our firm offers an unparalleled depth of experience in the human services, community development and organization development fields, including knowledge of best practices from other communities across the country that have tackled the issue of diversifying funding, developing technology driven solutions, developing new service structures including fee for service, and joint planning and integrated service delivery to better serve customers. Our strengths are a comprehensive understanding of how to apply business practices in the public sector as well as human service delivery in the context of broader economic and community development efforts and what it takes to change organizations to deliver quality services. Strumpf Associates has over 35 years of experience in strategy development and change management in public systems.

SA helps organizations to become customer focused, results oriented, data driven, and more ‘lean’ through effective process management. As part of that work we facilitate strategic planning for the organization. We help each organization create a strategic planning framework that includes a strategic planning cycle with regular time intervals that includes updating the strategic plan on a schedule and beginning the process of developing a new plan. Strumpf Associates also assists these organizations in developing a business plan/operational plan that drives implementation of the strategies.

#### ***Work in Virginia***

Annually, we assist the Northern VA Workforce Board and their operating arm, SkillSource, Inc. in facilitating the process of partner engagement in the development of their strategic plan and the WIOA Local Area Plan. Since 1999 we have helped the Northern VA board with program design, certification of career centers and affiliate sites, MOU development and IFA



negotiations, strategic planning, and board development. Strumpf Associates facilitated the development of and completed the initial 4-year WIOA Local Area Plan for the Hampton Roads Area in VA.

Currently, we operate a young adult program for the Bay WIB in Fredericksburg, VA. We have worked with the Capital Region WDB to develop their strategic plan and process. In addition, other organizations we work with in Virginia include: The Albemarle County Department of Social Services (2000 through the present) to become a high performance organization; Prince William County Department of Social Services (1998 through 2002) to become a high performance organization; the Fairfax County Office of Public Private Partnerships (2007 through 2009) to re-engineer how the office would function; Northern Virginia Community College System (2009 through the 2014) to merge six non-credit departments across six campuses into one department with one set of processes and systems; Senior Services of Hampton Roads (2018 and 2019) to set their strategic direction; and Suffolk City Redevelopment and Housing Authority (2017 through 2019) to facilitate strategic planning for the board. Two of our clients, the Albemarle County Department of Social Services and the Prince William County Department of Social Services were awarded the Virginia Productivity and Quality Award during our association with them.

### ***Corporate Clients and Capacity***

Since our inception in 1984, Strumpf Associates has been dedicated to the principles of quality as the foundation for re-engineering systems and restructuring services. We have worked with several organizations for a period of years to accomplish a change in organizational culture dedicated to the principles and practices of continuous improvement. These organizations include Montgomery County Hospice (2012 through 2014) to develop a strategy and implementation plan with the board to merge their foundation with their 501c3; the Montgomery County (MD) Executive and the County Council (2011 through the present) to create a 501c3 to privatize the delivery of workforce services to be able to operate at the ‘speed of business’ for all the residents of Montgomery County and we functioned as the acting director during the start-up phase of the organization; the Riverside County Workforce Development Board (2001 through the present) to become a high performance organization; the Chicago Mayor’s Office of Workforce Development through the transition to the new Chicago Workforce Council and the Chicago Department of Family Services and Support (2007 through 2012) to develop a continuum of services that broke down the siloes between units serving youth to seniors.

Strumpf Associates took the lead in facilitating the process of partner engagement and writing the initial WIOA Local Area Plan for the Montgomery County, Maryland WDB. Strumpf Associates facilitates the process of developing and negotiating the MOU and Resource Sharing Agreements under WIOA for several boards around the country.

Strumpf Associates conducts organizational assessments for city and county governments, WDBs, community-based organizations, and community colleges. The purpose of these assessments is to examine what services are currently offered to businesses and jobseekers in the context of labor market needs; the processes that support the service delivery system; the leadership system (inclusive of internal and external partners); and the processes that support fiscal and administrative operations. The resulting opportunity analysis includes actionable

strategies and a path forward to implement improvement strategies. Most recently we have conducted assessments for Los Angeles Mission Community College Workforce Development (CA), Bowling Green Economic Development (KY), and the Capital Region Workforce Investment Board (VA).

Strumpf Associates has developed targeted industry sector approaches designed to create an integrated, one stop approach to providing services to businesses. We have worked with Northern Virginia Community College's Division for Workforce Development as well as numerous workforce boards around the country to create sustainable alliances that identify both current and future workforce needs in high demand, high growth industry sectors that support family sustaining wages.

Over the past fifteen years, Strumpf Associates has assisted in designing and certifying for quality one stop centers for workforce boards, including the Northern Virginia WDB (7 centers), the Pierce County WDC, WA (1 center and 3 affiliates), Riverside County WDB (3 centers and 5 youth centers), the Pierce County, WA WDB (1 center), the Montgomery County, Maryland WDB (2 centers), LA City and County WDBs (26 centers), and the NW Washington WDC (4 centers).

Strumpf Associates manages and operates programs in several areas across the country. We managed a Workforce Innovation Fund Grant for 4 years in Riverside County, CA. This six million-dollar, 4-year project served 664 18-24-year-old young adults across 3 counties in southern CA. Over the last several years, Lori has helped her clients create 501c3's and 501c4s as part of the organization's strategy to expand their service footprint and to diversify funding. She has also served as the Interim Director of four workforce development boards for a period of 1 to 2 years. Currently, Strumpf Associates is the one stop system operator (OSO) for two workforce boards in the state of Washington.

Our vision is to excel at partnership with our customers to invest our resources, skills, ingenuity, and dedication to create positive change. We seek to do all we can to inspire others to join us and make a difference within their communities. Our mission is to manage change, build systems and improve quality by helping organizations re-think their business and refine their services.

Strumpf Associates: Center for Strategic Change provides change management consulting to not for profit community-based organizations as well as state and local government agencies. The outcome of organizational development and changing organizational practice is to make these agencies more efficient, effective and more customer focused. In general, we provide:

- Systems development and related implementation assistance;
- Ongoing technical and facilitation support for integration teams;
- Ongoing assistance to develop a knowledge management system to maintain quality assurance and standard operations for core processes;
- Assistance in developing a systemic approach to customer satisfaction data collection and analysis.

Lori Strumpf has over thirty-five years in the fields of human services, community development and workforce and economic development. Lori has been in business as Strumpf Associates:

Center for Strategic Change for the last 35 years. She is a nationally recognized expert in organizational development and change management, training and design for education, training, and human resource development systems and program management.

**References**

See attached Resume.

**SECTION IV: BUDGET for DELIVERABLES**

<b>Strategic Planning Process and Plan</b>	<b>\$9,985.00</b>
14.5 days @ \$710 per day/\$88.75 per hour <sup>1</sup>	
Facilitate the process of development (including facilitating focus group and meetings), follow up and preparation for planning meetings, draft focus group report, draft strategic plan, incorporate comments from team and produce a final Strategic Plan and Local Plan Document	
 <b>GRAND TOTAL</b>	 <b>\$9,985.00</b>

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<sup>1</sup> This is a discounted rate from our usual rate of \$1,100 for work conducted off site and virtually.