



Strategic Planning Process Facilitation Support Proposal

August 23, 2006

Revised September 21, 2006



Background

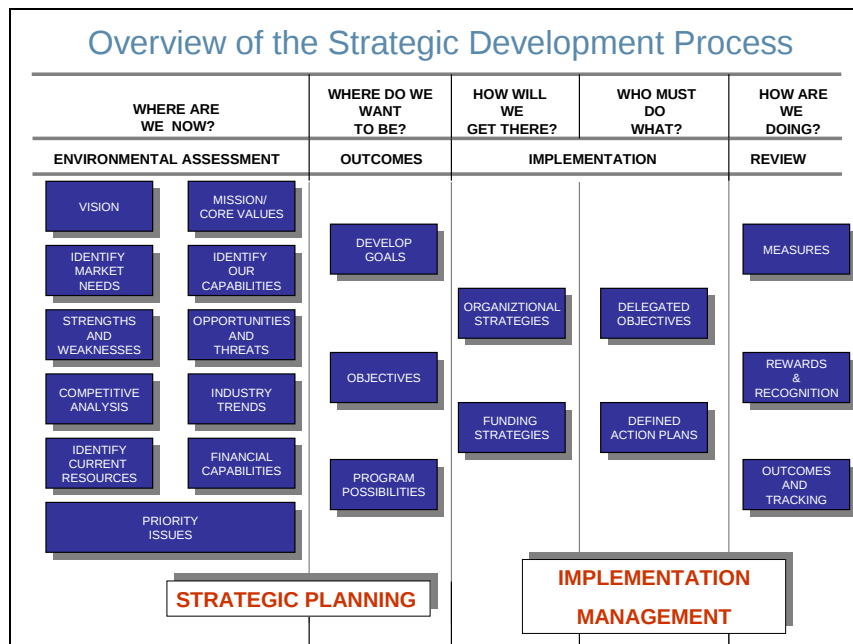
The Erie County Technical School is the career and technical education department for 11 school districts in Erie County, Pennsylvania. They offer 19 career training programs to high school sophomores, juniors and seniors including Art & Design, Computer Information Systems, Drafting & Design, Graphic Communications and Networking Technologies in the Communications area, Construction and Facility Maintenance Technologies in the Construction area, Early Childhood Education, Cosmetology, Culinary Arts, Health Assistant and Tourism & Hospitality Management in the Human Services area, Electrical Engineering, Electronics, Metal Fabrication, Plastics Technology and Tool and Die in the Manufacturing area and Auto Body Repair and Automotive Technologies in the Transportation area.

The Erie County Technical School is seeking facilitation services for its strategic planning process, is required by the Pennsylvania Department of Education and expects their facilitator to have experience working with public education, workforce development and business and industry.

This proposal is prepared in response to a request for proposal sent by Aldo R. Jackson, Director of the school. Strategy Solutions has the background, skills, experience and resources to complete the strategic planning process and meet the needs of Erie County Technical School.

Getting Started

In order to achieve the outcomes desired, the following process is recommended, based on the model successfully implemented by Strategy Solutions, Inc. with other organizations. The model is as follows:



The SSI model supports the creation of a shared leadership vision, as well as orchestrates the successful implementation of desired outcomes. Throughout this process, SSI staff can act as the overall facilitator and/or provide research and facilitation support for all or selected parts of the process, based on client need and available budget.

The facilitator serves in the crucial role of objective third party in this process by compiling all relevant and useful information and working diligently to get everyone's perspective. There are many stakeholder groups that would like to have input into this process, yet dozens or hundreds of individuals and/or stakeholder groups participating on the "planning committee" would be unwieldy and impossible to manage.

This process provides an equitable, organized approach to input and participation and allows the broad, diverse community a "voice" in the planning and prioritization process. In addition, although it is vital for "leadership" to have an articulated vision, there also needs to be an opportunity for stakeholders to contribute to the refining and enhancing of the plan. A skilled facilitator ensures participation, information-based recommendations to move forward and continually keeps the group "on target" with their established process and timelines to address the current priority objectives.

Strategy Solutions, Inc. recommends the following process and work plan.

Process and Work Plan

We recommend a four-phased strategic action planning process in order to develop and implement a strategic plan that utilizes a team-based approach and takes the group through all of the steps of identifying, prioritizing and implementing a strategic action plan to achieve the future vision of Erie County Technical School.

- **Phase I**, the **Environmental Assessment**, is the data collection and analysis phase, which includes **strategic dialogues** and answers the question, "Where are we now?"
- **Phase II** is the **Outcomes**-defining portion that includes the **visioning conference** and answers the question, "Where do we want to be?" and includes defining and articulating the "metrics" that will measure the success of the efforts.
- **Phases III** defines an **implementation** process and asks, "How will we get there and who must do what?" This includes creation of **strategy teams** as well as the **drafting and review** of the strategic plan.
- **Phase IV** serves as a quarterly **monitoring and review** of the work done and asks, "How are we doing?"

Phase I: Environmental Assessment

Where Are We Now? Identifying Capacity and Priority Issues

Phase I of the strategic planning process is an environmental assessment process. Strategy Solutions, Inc. recommends that the environmental assessment process include a review of the current vision, mission and core values, identification of market needs and current capabilities, review of industry trends, competitive analysis, identification of current resources and financial capabilities. The process begins with a review of the accomplishments to date related to goals, objectives and initiatives already underway. SSI will work with the Director to review current activities and outcomes. SSI staff will provide Dr. Jackson with an **Assessment Worksheet** at the start of the planning process. This worksheet includes a number of questions regarding information that supports the strategic decision making process that may already be available, such as: needs assessment, community image assessment, customer satisfaction, input from advisory groups, and other “environmental” information. This will be the foundation to draw conclusions about the strategic issues and priorities that are emerging for the future in preparation for the “*State of the Union*” presentation at the board retreat.

In addition, SSI staff will guide the staff and leadership to:

- 1) Incorporate Chapter 4 – Academic Standards and Assessment and Chapter 339 – Vocational Education Standards into the planning process. .
- 2) Review reports and factual information obtained from all available studies conducted on behalf of Erie County Technical School over the last 5 years and create an **information summary** of all findings, including similar and conflicting information as well as new ideas for development. SSI can provide support to develop the summary.
- 3) Conduct **3 in-depth stakeholder meetings** with key community constituents in small group sessions, including, but not limited to school board members, students, staff, parents, the business community and school district staff including superintendents, principals and guidance counselors. These discussions should include a review of current vision, mission and core values, as well as a vision and expectations for the future. SSI will moderate and prepare the report from the focus groups and Erie County Technical School will provide the logistical support of planning, recruitment and implementation. SSI will also train ECTS staff to facilitate additional stakeholder meetings with students and other stakeholders during the data collection process.
- 4) Conduct an internet-based **stakeholder survey**. This survey will be designed to collect information from key stakeholders who are not able to attend the stakeholder sessions. ECTS staff will be responsible for

inviting stakeholders to participate in the survey. SSI will provide the design, technical set up, tabulation and analysis of the survey. In addition, the survey can also be designed as a paper survey, which can be sent and distributed to stakeholders as desired by ECTS. The ECTS staff will provide data entry for any paper surveys collected and returned.

These activities will help to establish an accurate picture of the accomplishments to date based on current goals and objectives and highlight the key strategic issues facing the organization. All information will be compiled into a "Where are we now?" summary and presented to the strategic planning committee at their retreat.

Phase II: Outcomes

Where do we want to be?

After all of the data and input from the Environmental Assessment phase is compiled, the **Strategic Planning Committee** comprised of selected key stakeholders and decision makers, will attend a planning retreat/conference. At the retreat, the participants will discuss the mission of Erie County Technical School, along with the vision and core values that will drive the creation of goals and objectives for the future success of Erie County Technical School.

In preparation for the planning retreat, all board members/planning participants will receive a pre-retreat survey. The survey will be designed to collect input on the "key strategic questions" via the internet and the responses will be used as a basis to begin the discussion at the visioning conference. This is a particularly important step for Planning Committee members who, for whatever reason, may not be able to attend the conference, as it will provide a vehicle for them to provide input into the discussion.

At the planning retreat/conference, The *OptionFinder* audience response polling system will be used throughout the conference and the implementation process to assist in consensus building and shared understanding. The tool helps to facilitate discussion by allowing participants to "vote" according to their attitudes and opinions in the group discussions and prioritization sessions.

During the conference, the planning committee will identify specific goals and objectives that must be accomplished over the next few years to position Erie County Technical School for the future and identify the measures of success in these efforts.

A summary of the planning retreat proceedings, including the first draft of the strategic plan and potential metrics, will be compiled and distributed by Strategy Solutions, Inc. within one week of the retreat.

Phases III and IV: Implementation

How will we get there and who must do what?

Following the planning retreat, **implementation teams** will be created and will be assigned specific goals and objectives of the strategic plan. These teams will meet within 2 weeks of the planning retreat to review the plan and discuss their specific assignments. Each strategy team will be given 4-6 weeks to develop a “high level” action plan and expected budget for their objective(s). Each group will be expected to hold a number of action planning meetings during this phase to identify the key implementation steps along with human, capital and operating resources required to implement the objective(s). At this point in the planning process, it is not expected that the individual(s) and/or team(s) assigned the action planning will be the one(s) required to implement the initiative. The effort of these teams will be to identify what it will take to implement the goal and/or objective and to assess the capability/capacity of the college's current resources to implement it.

At the end of these phases, a full-day planning meeting will be held to present the action plans and associated costs for implementation. Total operating and capital budget requirements will be identified as part of the discussion/collation of information. The group will use that information to prioritize the objectives and determine implementation phases (and sequencing) if necessary, based on available resources. From the discussion and conclusions of the session, a final strategic plan by April 30, 2007.

Over the next several months, assignments will then be given to Individuals and teams to carry out the plan. The group will also discuss and identify methods for ongoing measurement of the outcomes of the process. An ongoing monitoring and review process will be established.

Phase V: Monitoring and Review

How are we doing?

A series of quarterly follow-up meetings will be scheduled with “Implementation Teams” to continue moving forward with the strategic plan through collaborative efforts of individuals and teams throughout the implementation process. An individual will be designated to coordinate periodic status reports for administration and the board.

SSI can continue to serve as a resource during this process by providing training and support for the person/group that will have ongoing responsibility for implementation coordination.

Timeline, Project Plan and Costs

The timeline, recommended project plan and costs for SSI to facilitate/manage the process is as follows:

Timeframe	Activity	Cost	Subtotal
January	Overall Project Management/Project Plan		
	Project Kickoff Meeting and creation of a project management calendar	\$ 500	
	Assist with identification of appropriate planning committee members and stakeholder sessions and process		
	Facilitate initial planning committee / board meeting to review process/timeline	\$ 200	
			\$ 700
January	Design Stakeholder Survey		
	Develop survey tool	\$ 100	
	Project Management, technical design and analysis of survey data	\$ 2,000	
	Create Summary Report of survey information	\$ 500	
			\$ 2,600
by Feb. 28	Create an information summary of all available data		
	(DT to provide approach/outline format)	\$ 200	\$ 200
January through February	Conduct 3 Stakeholder Sessions/Focus Groups		
	ECTS to schedule, recruit, provide room and refreshments		
	Design of Focus Group Topic Guide and approach	\$ 500	
	Facilitation of 3 focus groups (@\$800 per group)	\$ 2,400	
	Focus Group Project Management and Report Development	\$ 1,600	
			\$ 4,500
Early March			
	Board/Planning Committee Pre-Retreat Survey	\$ 500	
	Facilitate Planning Retreat	\$ 2,000	
			\$ 2,500
	Prepare Conference Summary and Draft Strategic Plan		
March	Meeting with ECTS leadership to identify strategy teams and members	\$ 300	
	Provide research/support/assistance to	\$ 1,000	

Timeframe	Activity	Cost	Subtotal
January	Overall Project Management/Project Plan		
	develop strategies and funding streams for action planning teams		
March	Strategy Team Instruction Meeting	\$ 300	
April	Strategy Team Compilation Meeting	\$ 1,000	
	Update strategic plan	\$ 100	
April	Identify Metrics; provide implementation and budget "compilation and connection support"	\$ 500	
	Write and finalize final plan narrative for presentation to the Joint Operating Committee/Community	\$ 500	
			\$ 3,700
	Total	\$ 14,200	\$ 14,200

A complete project management plan will be created within one week of the acceptance of this proposal.

Terms

One-fourth (25%) of the total selected contract price is due and payable on January 1, 2007, with the signing of this proposal. The remaining amount is due and payable according to the following schedule. Other arrangements can be made to fit the needs of the client if requested.

Payment Schedule	
Initial Payment - January 1, 2007	\$ 3,550
Payment February 1, 2007	\$ 2,660
Payment March 1, 2007	\$ 2,660
Payment April 1, 2007	\$ 2,665
Final Payment Upon Completion	\$ 2,665
Total	\$ 14,200

Cancellation

This agreement may be canceled at any time upon ten (10) days written notice. In the event of cancellation, Erie County Technical School will promptly reimburse Strategy Solutions, Inc. for work completed and actual expenses incurred to date of cancellation. Such payment will be due and payable immediately upon the effective date of cancellation.

Warranty and Indemnity

Strategy Solutions, Inc. will execute its responsibilities under this proposal in a professional manner consistent with common trade practices. Strategy Solutions, Inc. adheres strictly to the Code of Ethics of the Marketing Research Association, the American Marketing Association, and the International Association of Facilitators.

The conclusions and recommendations rendered under this proposal are the professional opinions of Strategy Solutions, Inc. based upon information derived from the data collected. **Erie County Technical School** agrees to indemnify and hold Strategy Solutions, Inc. harmless from any liability whatsoever with respect to such conclusions and recommendations.

Acceptance

Please sign and date the original and enclosed copy of this proposal and return the signed original to Strategy Solutions, Inc. The above proposal has been read, acknowledged and agreed to this ____ day of _____, 2006.

Erie County Technical School

Aldo R. Jackson, Ph.D., Director

STRATEGY SOLUTIONS, INC.

Debra A. Thompson, President

Company Profile

Strategy Solutions, Inc. (SSI) is a business development firm that provides strategic planning and market research services to organizations and communities and has extensive experience in both the economic development and workforce development systems. SSI offers a number of “core” services including strategic planning, market research and program development. SSI staff has more than 100 years combined experience in providing solutions and enhancing growth for health care, government, manufacturing and non-profit community organizations. SSI is certified in Pennsylvania as a Women’s Business Enterprise (WBE).

Because there are special needs for each of these industries, SSI has tailored programs such as the Regional Economic Development Planning for communities and regions, Community Resources for Growth for non-profit organizations, the Community Health Assessment program for health care organizations and Environmental Assessments for business and industry. Our projects and clients have been recognized as “best practices” by the International Economic Development Council, the International Association of Facilitators, PA Partners (the state workforce association) The Pennsylvania Departments of Public Welfare, Public Health and Education, the US Department of Health and Human Services and US News and World Report.

Founded in 1998, the corporate office of SSI, located at 2402 West 8th Street, Erie, PA 16505, currently houses 8 full and part time employees and has 2000 square feet of office/conference space. SSI has a second location in Pittsburgh at 3612 McKnight Road East.

Strategy Solutions has extensive workforce and economic development experience and has worked with over 150 organizations in support of their market research, strategic planning and business development goals.

Relevant Client Experience

Project Description	Contact Person(s)
Northwest Healthcare- Industry Partnership SSI is currently working as the facilitator for this partnership. In this role, SSI is a collaboration/communication medium for strategic planning and resource development for healthcare providers. Project outcomes include: Facilitate a planning retreat for the HIP in order to establish a vision for the HIP and a one year project plan; Provide one year of overall project management, support and direction	Michele Zieziula 764 Bessemer Street Suite 102 Meadville, PA 16335 michelez@nwpaawib.org

Project Description	Contact Person(s)
to the HIP and develop a process to measure the outcomes of the HIP; Determine the skill, competency and training needs of participating employers to guide the research process and assist in the design of data collection approaches/surveys; Complete research of the standard knowledge, skills, and abilities of the 15 industry occupations identified by the Industry partnership; Complete workforce industry research and quantify a forecast of job availability and growth of the 15 target occupations over the next three to five years; Complete an employer survey to identify current issues facing the employers in terms of training, recruiting and growing their workforce for the 15 target occupations; Complete a training provider survey to identify programs and curriculum currently available in the region and assess the ability of the content to meet the employers' needs around the 15 target occupations; Conduct a gap analysis of the data compiled from employers and training providers to note which areas of job training are not being met; Measure the outcomes of the industry partnership; Complete a final report of all information, separated by occupation that identifies areas of concern; Develop an educational needs recommendation that includes next steps; Present the report and recommendations to the HIP in order that they may better match people to training and ultimately jobs and identify a marketing plan to recruit additional candidates into training programs.	
Electronic Manufacturing Service Providers- Industry Partnership SSI is currently working as a collaboration/communication medium for strategic planning and resource development for electronic service providers. Project outcomes include establishing a vision for the EMS IP and a six month project plan that meets the partnership goals & objectives. Plan elements include: Facilitate monthly meetings (6) of the EMS IP. Provide six months of overall project management, support and direction to the EMS IP. Create a "one page" marketing/communications piece to create awareness of RoHS and WEEE issues and invite Industry Partnership participation Conduct initial RoHS "Risk Assessment" surveys with EMS-related companies to identify awareness and readiness, invite participation in	Mike Lawrence Deputy Director Workforce Development North Central WIB 651 Montmorenci Road Ridgeway, PA 15853 mike@ncwib.org Michele Zieziula 764 Bessemer Street Suite 102 Meadville, PA 16335 michelez@nwpawib.org Sam Gianetti 44 South beaver Street New Castle, PA 16101

Project Description	Contact Person(s)
Industry Partnership workshops and recruit Industry Partnership membership Conduct 4-5 regional employer workshops (Erie, Sharon, Oil City, Ridgway and possibly Bradford) to educate regional EMS and related supply chain companies regarding RoHS and its requirements and implications, educate companies regarding resources available and invite participation in the IP In preparation for the workshops complete (3) cluster activities to assist the partners possibly including development of a web site for the purpose of communicating information regarding RoHS and EMS resources and activities, compilation of a cluster resource guide including an inventory of all of the resources and assistance available through the Pennsylvania state service providers (with emphasis on determining the available resources through the Pollution Prevention Fund, DCED and the manufacturing ombudsman as well as other local and regional resources) and Identify a case management and implementation support process through the economic development system for follow up on action plans to provide resource assistance to partner companies (to ensure that individual company's needs are met). Analyze and compile primary and secondary research related to the occupational ladder and lattice in the electronics sub cluster. Complete research of the standard knowledge, skills, and abilities of the 10 largest growth occupations identified in the career ladder/lattice by the Industry partnership. Determine the skill, competency and training needs of participating employers to guide the research process and assist in the design of data collection approaches/surveys. Complete workforce industry research and quantify a forecast of job availability and growth of the 10 target occupations over the next three to five years. Conduct follow up research with identified companies to identify issues and capital funding and training needs relative to RoHS as well as general needs for incumbent worker training, recruiting and growing their workforce for the 10 target occupations and demand for those occupations Complete in-depth training assessments of 18 selected employers Complete a training provider survey to identify programs and curriculum currently available in the region and assess the ability of the content to meet the employers' needs around the 10 target occupations Conduct a gap analysis of the data compiled from employers and	samg@wcjp.org

Project Description	Contact Person(s)
training providers to note which areas of job training are not being met. Complete a final report of all information, separated by occupation that identifies areas of concern, training and development needs. Develop an educational needs recommendation and incumbent worker training plan that includes next steps. Recruit and orient appropriate new employers and training providers into the partnership. Present the report and recommendations to the EMS IP in order that they may better match people to training and ultimately jobs. Identify a process by which CareerLink staff recruit and assess candidates suitable for entry to the industry or appropriate training programs. Develop a system by which to measure the desired outcomes of the EMS IP.	
Great Lakes Building Trades Industry partnership The primary goal of the this initiative is to increase the GLBCT market share of major development scheduled to occur in Northwest, PA that the trades within the partnership are preparing to bid on. In addition, the partnership seeks to better prepare entry level and incumbent workers for Building and Construction occupations, armed with enhanced technical and knowledge based skills to enable positive movement throughout the industry's career paths. The specific objectives of the project include: Complete a research study of local architects, end-users, and general contractors regarding their purchasing and decision-making process when selecting workers for construction projects. The study will include measuring perceptions of the strengths and weakness of union labor in the local/regional construction industry, sub-contractor selection criteria, past experience and satisfaction with union labor, assessment of the requirements for union labor to procure additional work in their projects and other areas identified by the GLBCT Industry Partnership Present the findings to up to 10 GLBCT Industry Partnership individual trade groups and facilitate discussion and action planning regarding willingness to meet contractor/decision maker requirements and refine (if necessary) the "product" (or the process) to sell more "work hours" Design a "get sales" process to assist the unions target qualified prospects and sell more "work hours" to their current customers Procure a marketing firm to design a logo, website and create a plan for a public awareness campaign promoting the positives of career	Michele Zieziula 764 Bessemer Street Suite 102 Meadville, PA 16335 michelez@nwpawib.org

Project Description	Contact Person(s)
opportunities within the building and construction cluster. Develop strategies to attract women and minorities into the construction cluster careers Measure the outcomes of the industry partnership.	
Westmoreland/Fayette Workforce Investment Board CareerLink Performance Measures Technical Assistance For Westmoreland-Fayette, “developing and utilizing performance measures” has been identified as the targeted area for improvement. To this end, the technical assistance process seeks to achieve the following outcomes: Facilitate a meeting with the Operator Consortium of the Westmoreland-Fayette CareerLink system to review current performance measures and the processes used to collect, report, interpret and utilize data and information for performance management and system improvements. Conduct research from around the state and country to identify “best practices” in developing and utilizing measures for performance management and improvements. Facilitate a meeting with the Operator Consortium and selected program staff to review the best practice research and determine an action plan and next steps to implement identified changes.	William Thompson Executive Director Westmoreland/Fayette Workforce Investment Board 145 Pavilion Lane Youngwood, PA 15697
North Central Workforce Investment Board Strategic Plan <u>Strategic Plan Update</u> The NCWIB is dedicated to be one of the nation’s premier workforce development systems. They are committed to serve as the major catalyst for local business expansion in the region and educate and retain local residents to exceed the workforce needs of local businesses. To accomplish this, the NCWIB retained Strategy Solutions in 2003 to facilitate the review of past strategic plan accomplishments, discuss the future direction of the NCWIB, discuss and determine if any changes were needed for the strategic direction, and identify action steps to get there. The group drafted a new strategic plan as an outcome of this effort.	Mike Lawrence Deputy Director Workforce Development North Central WIB 651 Montmorenci Road Ridgeway, PA 15853 mike@ncwib.org
Regional Center for Workforce Excellence Northwest PA Workforce Investment Board <u>CareerLink Site Analysis</u>	Michele Zieziula 764 Bessemer Street Suite 102

Project Description	Contact Person(s)
The NWPA WIB retained Strategy Solutions, Inc. to analyze and report on the various functional and cost factors involved the operations, to research best practices and comparative costs of operating the CareerLinks in the various areas, to compare that information to an “ideal” functional model for service at both the local and regional level, and report the information so that good fact-based management decisions could be made regarding the future operations of the CareerLinks.	Meadville, PA 16335 michelez@nwpawib.org
Manufacturers Education and Economic Network (MEEN) – Industry Partnership The Manufacturers Education and Economic Network (MEEN) was a collaborative effort of the North Central and Northwest Workforce Investment boards to develop and implement a process to better meet the needs of regional manufacturers. To support this effort, SSI conducted a needs assessment of regional employers, completed an inventory of regional resources available to manufacturers and facilitated the work of the steering committee during the planning and initial implementation phases.	Mike Lawrence Deputy Director Workforce Development North Central WIB 651 Montmorenci Road Ridgeway, PA 15853 mike@ncwib.org Michele Zieziula 764 Bessemer Street Suite 102 Meadville, PA 16335 michelez@nwpawib.org
Transportation Education and Economic Network (TEEN) – Industry Partnership The Transportation Education and Economic Network is a collaborative effort of the North Central, Northwest, and West Central Workforce Investment Boards to improve the image, address the driver shortage, and improve the professional training of the over the road trucking industry. To support this effort, SSI designed, conducted and analyzed a needs assessment survey of national and regional employers, and compiled and analyzed primary and secondary research related to the occupational lattice in the transportation and logistics cluster.	Mike Lawrence Deputy Director Workforce Development North Central WIB 651 Montmorenci Road Ridgeway, PA 15853 mike@ncwib.org Michele Zieziula 764 Bessemer Street Suite 102 Meadville, PA 16335 michelez@nwpawib.org Sam Gianetti 44 South beaver Street New Castle, PA 16101 samg@wcjp.org
Regional Center for Workforce Excellence, Northwest PA Workforce Investment Board – Employer Needs Assessment/Gap Analysis The NWPA WIB retained Strategy Solutions, Inc. to identify the training and employment needs of regional employers in 7 industry clusters and to identify “gaps” in regional training offerings to meet employer needs. The project encompassed information at the occupation level, analyzing the	Michele Zieziula 764 Bessemer Street Suite 102 Meadville, PA 16335 michelez@nwpawib.org

Project Description	Contact Person(s)
specific knowledge, skills and abilities (KSAs) required by workers in the top 5-7 occupations within each industry cluster, measured employer demand for the individual occupations, satisfaction with training available and analyzed the curriculum of available training programs for “fit” with the KSAs required by employers. This research became the foundation for the creation of industry partnerships in NW PA.	
Pittsburgh Allegheny CareerLink – Program Planning Sessions for Employer Service Unit, Youth Services and Job Seeker Services The Pittsburgh CareerLink has retained Strategy Solutions for multiple one-day program planning sessions to improve workforce operations. During these sessions, existing programs were evaluated in terms of workflow process efficiency, customer needs and satisfaction, program components, methods, and objectives. Action plans with specific accountability and timeframes were created.	Judy Hill-Finegan City of Pittsburgh 414 Grant Street Room 406 City County Building Pittsburgh, PA 15219 jhill@pqhccareerlink.org
Corry Area Visioning/ Strategic Planning Process In 1998, the Corry Vision steering committee began the process of identifying key community groups with whom to hold input meeting, and other processes for developing a community strategic plan. The first component of the project included a series of twenty (20) “Visioning Forums,” that is, public meetings with various groups of community residents in which participants had the opportunity to brainstorm ideas toward the future vision for the Corry area. The selected area included the communities of Corry, Columbus, Clymer NY, Concord Township, Wayne Township, Spartansburg, Sparta Township, Spring Creek Township, and Elgin Borough. Over 200 people participated in the visioning sessions. The input was then prioritized by each group through a multi-voting exercise. The second component of the process was a comprehensive community survey that returned 1,262 surveys. The objectives of the survey were to determine residents’ attitudes toward several components of community quality of life; to measure residents’ satisfaction with existing infrastructure and services in the Corry area; to assess attitudes toward a variety of land use alternatives for the vacant land in the Corry area; and to measure the priority of future projects for the area. After analysis and review of the data, the steering committee developed goals and objectives for the future of the Corry area and identifying accountability for project implementation. These efforts have resulted in significant development and job creation in the area. The development model has been expanded to other areas of Erie County.	P.C. “Hoop” Roche, Chairman & CEO Erie Plastics (814) 663-8800 rocheh@erieplastics.com

Project Description	Contact Person(s)
Economic Development Strategic Plan for the Civic Coordinating Committee of Erie County In June of 2000, the consultant team of Regional Technology Strategies (RTS) of Chapel Hill, North Carolina, and The FutureWorks Company of Cambridge, Massachusetts were hired by the Economic Development Corporation of Erie County (EDCEC), the Erie Conference on Community and Economic Development, the City of Erie and Erie County, to perform a comprehensive analysis of Northwestern Pennsylvania's regional economy. Of the several recommendations and action steps revolving around a long-term strategic process, the FutureWorks consultant group recommended a first step of organizing a Civic Coordinating Committee comprised of local civic, business and non-profit leaders in the region to begin the planning and implementation of an economic development strategic plan for the region. Strategy Solutions, Inc. (SSI) was asked by the co-chairs of C³, to propose a strategic process that would define a community action agenda, for which C³ would ensure its implementation. The process included a group of 35 decision makers, input from 39 agencies, 18 stakeholder forums, and a community wide survey with over 600 responses, a CEO survey, and best practice research. The process resulted in the creation of a long-term strategy and plan that has achieved over 95% consensus among community leaders and it on its way to implementation success. The process was highlighted by the International Economic Development Council at the 2003 conference and the International Association of Facilitators in 2005. The Downtown Improvement District was one of the many initiatives and outcomes successfully supported through the C³ process.	Jacob Rouch, Executive Director Erie Regional Chamber & Growth Partnership (814) 454-7191
United Way of Erie County Strategy Solutions has facilitated a number of organizational development and capacity building projects and processes for United Way including the Community Needs Assessment and strategic planning processes that resulted in the strategic "shift" of the United Way from a "charity of charities" to "community solutions provider." In addition, when the Early Care and Education Planning process for Erie County was formalized in January, 2002, Strategy Solutions was retained in order to facilitate the six-month planning process. A total of 12 stakeholder forums (focus groups) were conducted to obtain input from parents, child care providers, employers, health care workers, and citizens regarding the issues facing early care and education. Secondary research was conducted to compile relevant information and statistics regarding the current early care and education system. A data committee reviewed the	Bill Jackson Vice President/COO United Way of Erie County 110 West 10th Street Erie, PA 16501 (814) 456-2937 bill@unitedwayerie.org

Project Description	Contact Person(s)
data and prepared recommendations. A model committee identified the elements of the ideal model for early care and education in Erie County. The steering committee created their strategic plan in May, 2002 and the final report was submitted to the State Department of Public Welfare (DPW) in July, 2002. The planning model was recognized as a “best practice” by DPW. SSI was also retained to assist with and coordinate implementation of the plan, which became the foundation of the United Way’s “Success by Six” initiative. SSI completed a review, evaluation and updated of the strategic plan in 2004.	

Debra A. Thompson, BS, MBA**President**

The project manager will be Debra Thompson is President of Strategy Solutions, Inc. Among services to both for-profit and non-profit organizations, her major accomplishments include facilitating local and regional economic development strategic planning and system redesign initiatives, visioning & planning processes for government consolidations, health care systems and joint ventures, as well as business turnarounds. Prior to this position she served as Director of Planning for Hamot Health Foundation and Corry Regional Health Systems where she was responsible for strategic planning, market research, marketing information systems, as well as affiliate and community planning support. She also held positions of Manager, Market and Product Planning and Coordinator, Marketing Information Systems.

Throughout her tenure at Hamot, Debra had the opportunity to work with Health Care Outlook, a consortium operated by Dr. Robert Blendon, Director of the Harvard School of Public Health; Humphrey Taylor, Chairman of Lou Harris & Associates; and Ian Morrison, President of the Institute for the Future. From this and other strategic planning experiences, Debra created a unique approach to data collection, analysis and facilitation that is successful for individual organizations, systems and communities that has been recognized both in the state of Pennsylvania and nationally.

Before joining Hamot and while completing graduate studies at Gannon University, Debbie worked as a Business Analyst in the Small Business Development Center. She has also taught Marketing, Research and Strategic Planning courses and is an adjunct faculty member at Gannon University. For the past two years, she has served as the Strategic Planning faculty for the Penn State Economic Development Course coordinated through the Governor’s Action Team. Earlier in her professional career, as a partner in DiVecchio’s Restaurant and Catering, she developed and managed both a full service family restaurant and off-premise catering service where she directly supervised a staff of 45 full and part-time employees.

A graduate of Villa Maria College with a B.S. in Marketing, Debbie received her Master of Business Administration from Gannon University. She has also completed advanced training in Strategic Planning, Quantitative and Qualitative Market Research, Total Quality Management and Leadership Development, Systems Thinking & Facilitation (through affiliates of MIT) and is a 1993 graduate of Leadership Erie. She was a member of the 2003 inaugural class of the Coro Center for Civic Leadership “Women in Leadership” program in Pittsburgh, and has recently completed its Trainer Certification Program. Debra has completed the BoardSource Board Governance Training program. National presentations have included the OptionFinder User’s Group Conference in 1996 and 2000, the International Association of Facilitator’s Conference in 1998, the Development District Association of Appalachia, and the National Communicators Network of Women Religious in 2003. She has conducted numerous local and regional training sessions and conferences.

Chosen as one of Pennsylvania’s Best 50 Women in Business 2001, she was honored as one of Erie’s “Dynamic Dozen” of Women Making History in 2003.

Nick Schultz, BA - Director of Workforce and Community Services

As Director of Workforce and Community Services for SSI, Nick is responsible to provide leadership, project management, and client support for training, research, planning, facilitation, organizational and program development projects for workforce and other non-profit clients.

Nick has also been President and Chief Executive Officer of the Transportation Employment Network (TEN). In partnership with five of the largest privately held freight hauling corporations in the United States, TEN serves as an employer intermediary. Charged with addressing the shortage of employees in the Transportation and Logistics Cluster, TEN is responsible for connecting these national companies to local workforce development supply systems. Through a collaborative marketing, education and assessment process TEN facilitates improved attraction, preparedness, retention and advancement potential within the field of Transportation and Logistics. Nick brought to his position over ten years of workforce development experience. Under the direction of the Erie Operators Consortium, he served as the Site Administrator for the Erie Careerlink. Nick was responsible for oversight of the daily operation, internal and external coordination and linkage of service delivery and the development of strategic initiatives that met local labor market demands. He served as WIB Director and Fiscal Agent for the Northern Tier Area of Pennsylvania. His duties included strategic and fiscal management for the enhancement of a rural five-county area, leading to the development of a comprehensive workforce development system. During his tenure, he was responsible for fiscal and strategic planning, board leadership and development,

and industry sector initiatives. Prior to that, Nick served as a JTPA Program Operator in a three-county Service Delivery area in the Southern Tier of New York State.

JT Rehill, BA

Director of Business Development Services

As Director of Business Development Services with Strategy Solutions, JT Rehill is responsible for executing business development projects to help SSI's clients grow their businesses. In this role, JT also supports community and economic development by facilitating public involvement and creating linkages between private industry and economic development. His focus is on strategic sales and market planning, as well as business process improvement. As a trained focus group facilitator through RIVA, JT conducts and manages qualitative research projects for clients. Prior to joining SSI, JT worked in the advertising industry where he created and implemented a project management system, and developed a comprehensive sales and marketing process.

JT's previous experience also includes managing the production department of a litigation consulting firm in Manhattan, where he helped attorneys organize complex evidence into understandable demonstrative exhibits for use in trials. In this role he also coordinated primary research using focus groups to help establish and refine the strategic direction of ongoing trials. Prior to that experience, JT worked with one of New York City's leading management consulting firms, Right Management Consultants, both as a Project Manager and as their Creative Director. In addition to project management and internal training and development, JT managed and refined the multi-rater feedback survey process for all client projects, in which he collected data through paper and electronic surveys and supervised the reporting process.

Kelsey Fitch, BS

Project Coordinator

Kelsey is a project coordinator at Strategy Solutions, Inc. In this capacity she completes primary and secondary research projects, compiles research data into report summaries and assists with strategic plan creation and updates. Kelsey is a graduate of Penn State University, where she earned a degree in Marketing with a minor in Communications. While attending the university, she completed internships in market research, advertising and event planning, where her project experience included primary and secondary research, statistical analysis and reporting, presentation development and group facilitation and training. Her experience also includes business and product development as well as researching and writing comprehensive business plans.

Kelsey's experience also includes serving as the Keystone STARS Representative for the Eastside YMCA. Keystone STARS is Pennsylvania's system of continuous quality improvement for child care through standards, training, assistance, resources and support (STARS).

Strategy Solutions' Client List Includes:

Academic Success Center, Erie, PA
Achievement Center, Erie, PA
Advanced Finishing, Fairview, PA
Allegheny County Library Association, Pittsburgh, PA
Allegheny Land Trust, Pittsburgh, PA
Appalachian Regional Commission, Washington, DC
Area Health Education Center, Erie, PA
Ashtabula County Medical Center, Ashtabula, OH
Associated Clinical Laboratories, Erie, PA
Association of Fundraising Professionals, NW PA Chapter
Alliance for Nonprofit Management, Washington, DC
Bayfront East Side Task Force, Erie, PA
Believer's International Worship Center, Erie, PA
Bradford Hospital Foundation, Bradford, PA
Bridgeville Library, Bridgeville, PA
Business Buffet, Toronto, Ontario, CA
Cable Access Television, Erie, PA
CALL, Erie PA
Carlisle Health and Wellness Foundation, Carlisle, PA
Carnegie Library, Tarentum, PA
Cleveland Clinic Health System, Cleveland, OH
Comfort Care and Resources, Erie, PA
Community Fund Drives Committee, Erie, PA
Community Health Net, Erie, PA
Community Shelter Services, Erie, PA
Community Lutheran Network, Cranberry, PA
Corry Area Vision, Corry, PA
Corry Community Development Corporation, Corry, PA
Corry Higher Education Council, Corry, PA
Corry Industrial Benefit Association, Corry, PA
Corry Regional Health Systems, Corry, PA
Crawford County, PA
Development District Association of Appalachia, Washington, DC
Duquesne University Nonprofit Leadership Institute, Pittsburgh, PA
Early Connections, Erie, PA (formerly the YWCA of Erie)
Edinboro University
Elizabeth Hunt & Associates, Toronto, Ontario, CA

Elk Regional Health Center, St. Mary's PA
Emergycare, Erie, PA
Erie Center for Health and Aging, Erie, PA
Erie Community Foundation, Erie, PA
Erie Community Fund Drives Committee, Erie, PA
Erie Conference on Community Development, Erie, PA
Erie County Civic Coordinating Committee (C-Cubed), Erie, PA
Erie County Convention and Visitor's Bureau, Erie, PA
Erie County Department of Planning and Economic Development, Erie, PA
Erie County Health Department, Erie, PA
Erie County Human Relations Commission, Erie, PA
Erie Cursillo, Erie, PA
Erie Dawn, Erie, PA
Erie Health Care Cost Summit, Erie, PA
Erie Neighborhood Watch Council, Erie, PA
Erie Homes for Children and Adults, Erie, PA
Erie Insurance, Erie, PA
Erie Plastics, Corry, PA
Erie Regional Chamber and Growth Partnership, Erie, PA
Erie Saints Basketball, Erie, PA
Erie United Methodist Alliance, Erie, PA
Experience Erie Children's Museum, Erie, PA
Faith-Based Network, Pittsburgh, PA
Family Services, Erie, PA
Findlay Lake Nature Center, Findlay Lake, NY
Fishtank Creative, Erie, PA
Flexible Thinker, Toronto, Ontario, CA
Gannett Fleming, Inc., Harrisburg, PA (as a subcontractor for PennDOT)
Gannon University Alumni Association, Erie, PA
Gannon University Small Business Development Center, Erie, PA
Gladiator Helmet, Edinboro, PA
Great Lakes Health Network, Erie, PA
Greater Erie Community Action Committee (GECAC), Erie, PA
Greater Erie Youth Symphony Orchestra, Erie, PA
Greene County, PA
Hamot Health Foundation, Erie, PA
Hamot Wellness Center, Erie, PA
HANDS, Erie, PA
Harborcreek Youth Services, Harborcreek, PA

Healthcare Financial Management Association, Western PA Chapter, Pittsburgh, PA
Healthcare Ventures Alliance, Erie, PA
HERO (Heath Education and Resource Opportunities, Erie, PA
Hospice of Metropolitan Erie, Erie, PA
House of Healing, Erie, PA
Human Resource Management Association of NW Pennsylvania
Institute for a Healthy Community, Erie, PA
International Institute, Erie PA
L'Arche, Erie, PA
Lake Area Health Education Center, Erie, PA
Lawrence County, PA
Leadership Corry Area, Corry, PA
Leadership Shenango, Mercer, PA
League of Champions, Youngstown, OH
Lehigh Valley Business Conference on Health Care, Bethlehem, PA
Loyal Christian Benefit Association, Erie, PA
Maryland Workforce Development Association, Baltimore, MD
Martin Luther King Center, Erie, PA
McKeesport Library, McKeesport, PA
Mercer County Planning Commission, Mercer, PA
Mercy Center for Women, Erie, PA
Mercyhurst College, Erie, PA
Mt. Macrina Manor, Uniontown, PA
Western Pennsylvania Annual Conference of the United Methodist Church, Cranberry, PA
National Alliance for the Mentally Ill, Erie County, PA
National Communicators Network of Women Religious, Pittsburgh, PA
Nonprofit Partnership, Erie, PA
North Central Workforce Investment Board, Ridgway, PA
North Central Regional Planning and Development Commission, Ridgway, PA
Northeast Ohio Areawide Coordinating Agency (NOACA), Cleveland, OH
Northwest Behavioral Healthnet, Erie, PA, Erie, PA
Northwest Industrial Resource Center, Erie, PA
Northwest Pennsylvania Industrial Resource Center, Erie, PA
Northwest Pennsylvania Workforce Investment Board, Meadville, PA
Northwest Regional Planning and Development Commission, Oil City, PA
Oil Heritage Region, Oil City, PA
Olszak Management Consulting, Pittsburgh, PA; faculty for Nonprofit Social Enterprise Course
Oil Region Alliance of Business, Industry and Tourism, Oil City, PA
Ophelia Project, Erie, PA

Pittsburgh/Allegheny County CareerLink, Pittsburgh, PA
Pittsburgh Parks Conservancy, Pittsburgh, PA
Pittsburgh Partnership for Neighborhood Development, Pittsburgh, PA
Penn Northwest Development Corporation, Mercer, PA
Penn State Harrisburg (Economic Development Course), Harrisburg, PA
Pennsylvania College of Internal Medicine, Harrisburg, PA
Pennsylvania Department of Transportation, Statewide Mobility Plan
Pennsylvania Department of Public Welfare, Autism Task Force
Pennsylvania Economic Development Association, Harrisburg, PA
Pennsylvania Housing Finance Agency, Pittsburgh, PA
Pennsylvania Partners, Harrisburg, PA
Presbyterian Homes, Erie, PA
Presentation Sisters of Dubuque, IA
Presentation Sisters of New Windsor, NY
Presentation Sisters of South Dakota, Fargo, SD
Preservation League of New York State, Albany, NY
Printing Concepts, Erie, PA
Provider Resources, Erie, PA
Reason for Our Hope Foundation, Erie, PA
Redstone Presbyterian Senior Care, Greensburg, PA
Regional Cancer Center, Erie, PA
Regional Center for Workforce Excellence, Meadville, PA
Rouse Estate, Youngsville, PA
Safe Horizons, Erie, PA
SafeNet, Erie, PA
Saint Vincent Health Center, Erie, PA
Signature Mortgage, Erie, PA
Sisters of Saint Joseph of Northwestern Pennsylvania, Erie, PA
Southwest Corner Workforce Investment Board, Washington, PA
SSJ Neighborhood Network, Erie, PA
St. Paul's Neighborhood Free Clinic, Erie, PA
Struther's Library Theater, Warren, PA
TCI Cable Television, Erie, PA
Tri-County Workforce Investment Board, Butler, PA
Technology Council of Northwest Pennsylvania, Erie, PA
Temple Anshe Hesed, Erie, PA
Township of Fairview, PA
Tungsten Creative, Erie, PA
United Way of Erie County, Erie, PA

Venango County Economic Development Corporation, Oil City, PA
Veterans Administration Medical Center, Erie, PA
Villa Maria Academy, Erie, PA
Villa Maria Center, Erie, PA
Villa Maria Elementary, Erie, PA
Voluntary Hospitals of America (VHA) of Pennsylvania, Pittsburgh, PA
Walking In Black History, Erie, PA
West Central Job Partnership, Sharon, PA
Westfield Hospital, Westfield, NY
Widows and Widowers International, Erie, PA
Women's Economic Development Outreach Tour, Erie, PA
YMCA of Greater Erie, Erie, PA
Young Erie Professionals, Erie, PA
YWCA, Erie, PA