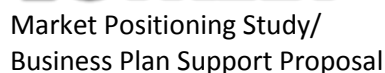


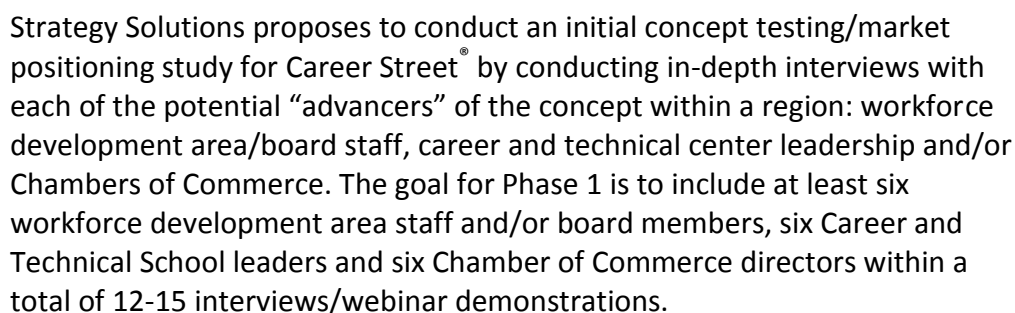


**Market Positioning Study/  
Business Plan Support Proposal**

May 23, 2017



Career Street® is a comprehensive career exploration and planning program offered by the Erie County Vocational-Technical School Foundation. The program links businesses, nonprofit organizations, and schools to create and share experiences for students to job shadow, intern, tour companies, benefit from class speakers, and participate in career workshops and fairs. Career Street®'s goal is to unite employers, schools and nonprofit organizations in the pursuit of a well-prepared workforce, and to help better prepare students for the careers they want. After several years of successful operation in Erie County, other areas of the state and several regions from around the country have expressed interest in offering the program. In response to this interest, Career Street® is seeking to understand the potential market to expand the program by conducting market research with the potential target market(s) and to prepare a business plan that would outline the action steps and costs required to expand the program, along with the expected return on investment.



This could be followed by additional phases of research that could include but not be limited to a survey of the target market(s), depending on the success of the first phase as well as the needs and interests of the client. In addition, Strategy Solutions will provide technical assistance and review of the business plan for the program expansion as it is developed.

The objectives of the concept testing/market positioning study include:

## Phase 1: Exploratory Analysis

**Conduct in-depth interviews.** The feedback gleaned from in-depth interviews would enable the Career Street® leadership to understand the decision-



making process involved in adopting this type of product and to determine how Career Street® would need to market the product. Knowing how potential target market customers think and react to the product offering will help to determine where market opportunities lie, the potential demand for the program and whether any perceived or real competitors exist. The research will also help clarify which marketing strategies will achieve a greater return on investment.

Strategy Solutions recommends a simple, straightforward approach by conducting in-depth qualitative interviews with a minimum of six (6) of each of the prospective “advancers” of the concept within a region, in a total of no more than 12-15 interviews. The approach will be to contact the leadership of workforce development areas (WDAs) and ask them to convene the Career and Technical School leadership and Chamber of Commerce representatives from their local area to participate in a one-hour discussion of the Career Street® product/program. This will include a 20-minute “webinar demonstration” of the product that will be conducted by the Career Street® staff. The “webinar demonstration” will then be immediately followed by a 20-30 minute in-depth interview conducted by Strategy Solutions’ staff.

If the targeted WDA staff expresses that they are either not interested in the concept and/or is unwilling to convene the other possible “advancers” of the concept within their region, Strategy Solutions will outreach to the leadership of those entities (Career and Technical Centers and/or Chambers of Commerce) separately to ask them to participate in the demonstration/interview and/or to convene others to participate. Strategy Solutions will continue to look for prospective target customers until a minimum of six individuals representing each of the potential target audiences participate in interviews.

The webinar/interviews will be conducted over a 6-week period (1-2 per week) starting approximately two weeks after beginning the project. This will allow Career Street® staff time to adequately prepare for each customized interview and allow Strategy Solutions’ staff to schedule webinar/demonstrations with all parties.

The interviews will be designed to gauge:

- Current approaches undertaken by regions to link business and education to support student career exploration





- Top of mind awareness of Career Street® and/or other similar products or programs along with reactions to the features and benefits of the product
- Importance of various factors when making a decision to invest in a product or program of this nature
- The purchase decision making process itself, including the timing and individuals that would be involved in making the decision and/or taking responsibility for implementation of the product/program
- Satisfaction with current vendor or approach (if the interviewee is using any similar type of current product/program)
- Sources of information when seeking tools and services of this nature to determine which marketing communication channels are best to capture attention and share information
- Reactions to new product and/or service features and/or enhancement ideas (reactions to new features and/or services that you may be considering that you want to test with them to see what their reactions are to the ideas)
- Decision making criteria and process of considering a product like this to gauge possible adoption rates
- Input on the type(s) of training and support needed to implement the product/program within a local area
- Feedback on pricing of the product/program to determine the likeliness of purchase/investment at various price points
- Determine the extent to which the interviewee(s) may be interested in the product/program that they could become an actual prospect for the product/program

## **Phase 2A: Market Size and Forecast**

The methodology for Phase 2 would be designed after Phase 1 is completed and could include additional webinar/demonstrations, surveys or both, as well as a demand analysis based on the results. This phase might include surveys of up to 100 individuals within a target market segment, selecting those who are either decision makers or who would be influencing decision makers for products of this nature. This phase would be designed to actually quantify the size of the demand for Career Street®, based on the expansion/rollout that it expects to conduct over the next two to three years.



If completed during this phase, surveys would be designed to gauge interest in the Career Street® product/program, quantify the percentage of the market very likely to consider their products and services over the next three years, and generate specific leads that Career Street® could then follow up on to cultivate as clients. The specific approach for Phase 2 (if desired) as well as the costs associated with this phase would be determined after the successful completion of Phase 1.

Even without additional interviews or surveys, Strategy Solutions will help Career Street® leadership estimate and quantify the size of the target market and/or potential demand to support the business plan development.

### **Phase 2B: Business Plan Support**

Strategy Solutions will then provide technical assistance along with review of the draft and final business plans developed by Career Street® leadership. During this phase, Strategy Solutions' staff will provide feedback, input, comments and suggestions to improve the business plan.





### Description of Deliverables

The expected outcomes for Phase 1 of this engagement will include (but not be limited to):

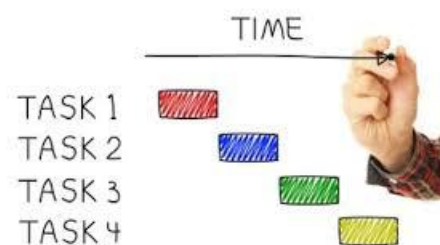
- A complete summary of the results of the research completed by the agreed upon due date
- Recommendations for product/service enhancements, product/market positioning strategies and marketing/communication channels and messaging based on the results of the interviews.

The expected outcomes for Phase 2 will include:

- Estimate of the market size and potential demand for the Career Street® product/program
- Technical assistance to complete the final business plan.

### Our Approach

| Date   | Activity                                                                                                                                                                                                                                                                                                                                                          |
|--------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Week 1 | Project start: meet with Career Street® leadership/management to discuss project objectives, target participants and finalize the interview/webinar approach. In preparation for this meeting, Strategy Solutions will draft an interview guide and ask Career Street® leadership to develop a one page outline of the program description, features and benefits |
|        | Review initial data, finalize interview approach and guide                                                                                                                                                                                                                                                                                                        |
|        | Identify and gather contact information for selected interviewees and start to schedule interviews                                                                                                                                                                                                                                                                |
|        | Career Street® will start to develop a customized approach for the webinar demonstration for the first target contact                                                                                                                                                                                                                                             |
| Week 2 | Prepare for interviews #1 and #2                                                                                                                                                                                                                                                                                                                                  |
| Week 3 | Conduct interviews #1 and #2                                                                                                                                                                                                                                                                                                                                      |
|        | Finalize preparation for interview #3 and start prep for #4                                                                                                                                                                                                                                                                                                       |
| Week 4 | Conduct interviews #3 and #4                                                                                                                                                                                                                                                                                                                                      |
|        | Finalize preparation for interview #5 and start prep for #6 & #7                                                                                                                                                                                                                                                                                                  |
| Week 5 | Conduct interviews #5, #6 and #7                                                                                                                                                                                                                                                                                                                                  |
|        | Finalize preparation for interview #8 and start prep for #9 & #10                                                                                                                                                                                                                                                                                                 |
| Week 6 | Conduct interviews #8, #9 and #10                                                                                                                                                                                                                                                                                                                                 |





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| Date                                                         | Activity                                                                      |
|--------------------------------------------------------------|-------------------------------------------------------------------------------|
|                                                              | Finalize preparation for interview #11 and start prep for #12 & #13           |
| Week 7                                                       | Conduct interviews #11, #12 and #13                                           |
|                                                              | Finalize preparation for interview #14 and start prep for #15                 |
| Week 8                                                       | Conduct interviews #14 and #15                                                |
| Week 9                                                       | Summarize Results                                                             |
|                                                              | Present findings and recommendations to Career Street®                        |
|                                                              | Determine interest in proceeding with any additional Phase 2 research         |
| Weeks 10 – 12 (or later if additional research is conducted) | Provide technical assistance, input and support to complete the business plan |

### Cost

| Activity                                                                                                                                 | Cost           |
|------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| Management Team meetings to discuss approach/progress and to identify answers to questions that are likely to be asked during interviews | \$ 500         |
| 12 (up to 15) in-depth interviews @ \$300 each (includes prospect identification, outreach, scheduling, interviews and data summary)     | \$3,600        |
| Summarize and present research results*                                                                                                  | \$ 600         |
| Business Plan review and technical assistance                                                                                            | \$ 500         |
| <b>TOTAL</b>                                                                                                                             | <b>\$5,200</b> |

\*It is anticipated that the results would be shared in person.



## **Contract Terms**

### **Security and Data Retention**

Project data, findings and materials are the sole property of the client, and will not be released by Strategy Solutions, Inc. (SSI) to any third party or parties whatsoever without the prior written consent of the client. SSI will exercise reasonable diligence to safeguard project data, findings and materials.



### **Terms**

This agreement is designed as a project-based contract. One half (50%) of the project fee is due with the signing of this proposal, with the remainder due upon completion of the final report.

### **Warranty and Indemnity**

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

The conclusions and recommendations rendered under this proposal are the professional opinions of SSI based upon information derived from the data collected.

### **Contact Person**

Questions regarding this proposal can be directed to:

Debra Thompson, President  
Strategy Solutions, Inc.  
8425 Peach Street  
Erie, PA 16509  
(814) 480-8000  
[debbie@getstrategy.com](mailto:debbie@getstrategy.com)



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### 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 \_\_\_\_\_, 2017.

**Career Street®**

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**Strategy Solutions, Inc.**

A handwritten signature in black ink that reads "Debra A. Thompson".

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Debra A. Thompson, President



## Our Team

**Strategy Solutions** has a rich history supporting business planning and system redesign initiatives in community, workforce and economic development, as well as implementing industry partnership programs in Western PA. Our unique approach to stakeholder engagement using the OptionFinder audience polling system and other on-line data gathering and analysis technologies allows us to proficiently manage and achieve consensus with large groups of varied stakeholders that often have different (and sometimes competing) interests.

As a research and strategy development firm, we also have experience working directly with economic and community development agencies and frequently have brought multiple and varied stakeholders together to support initiatives. Experience working with individual healthcare (across the full continuum of acute and post-acute care including public health), manufacturing (plastics, metals, electronics, and food production) and technology (both “total IT solution provider” and other technology niche/software development) companies gives their team members a unique understanding of the strategic imperatives within each of these industries as well as the workforce development and training needs from the employer’s point of view. Our existing relationships with key employers and stakeholders throughout Pennsylvania and across the country can be helpful to the data collection and business planning process.



## DEBRA THOMPSON



Debra Thompson is President of Strategy Solutions. In this position, she provides strategic planning facilitation, training and planning, and research project management services to organizations and communities. 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.

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. Her project work and clients have been recognized as best practice by the International Economic Development Council, the International Association of Facilitators, the PA and MD Workforce Development Associations, US News and World Report, US Department of Health and Human Services and by the Pennsylvania Departments of Health, Welfare and Education.

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 is also a Coro Certified Trainer.

Debra is on the adjunct faculty of Duquesne University where she teaches organizational development and program development/evaluation in the Masters of Organizational Leadership program. She was also an adjunct professor at Gannon University for 10 years where she taught Strategic Planning, Research Methods and Program Development. She is a certified trainer, consultant and peer reviewer for both the PA and National ***Standards for Excellence:® An Ethics and Accountability Code for the Nonprofit Sector***. Debra also services on the ***National Standards Ethics Committee***.

## JACQUI CATRABONE



As Director, Nonprofit and Community Services, Jacquie is responsible for providing leadership, facilitation, organization, project management and client coordination support for training, research, planning, facilitation, organizational and program development and evaluation projects for nonprofit and community/government clients. She is a certified trainer and consultant for the PA ***Standards for Excellence:® An Ethics and Accountability Code for the Nonprofit Sector.***

With an undergraduate degree in Psychology from the Pennsylvania State University and a Master of Social Work degree from Edinboro University of Pennsylvania, Jacquie brings a depth and breadth of project management and program development experience to SSI clients. Earlier in her career, Jacquie was a Research Project Manager at SSI where she was responsible for developing, implementing, analyzing and reporting primary and secondary research projects in all industry sectors and facilitating program development initiatives.

Her significant accomplishments include the facilitation of the Northwest PA Regional Economic Development “Roles and Players” Analysis for the Northwest Commission, that resulted in better working relationships between the county-level economic development & planning agencies and the commission. She was also instrumental in the establishment of the Success by Six program in Erie County and work on the development of the program outcomes measurement and evaluation process for GECAC’s Even Start Program, which was recognized by the PA Department of Education as a best practice. Jacquie is a trained facilitator for the development of program logic and outcomes measurement models utilizing the United Way methodology. She has worked with numerous faith-based organizations, sponsored ministries of religious orders and long term care organizations.

Prior to returning to SSI, Jacquie held the position of Early Childhood Mental Health Consultant for the Northwest Regional Key in Pennsylvania. In that role, she facilitated training programs for early care and education providers in addition to coordinating services for children and families. Jacquie also held progressively responsible positions for the Achievement Center, first as Therapeutic Staff Support, team leader assistant, team leader and behavioral specialist consultant, where she was responsible for developing and overseeing the Summer Autism Program.

She has also been a Research Analyst with the Mercyhurst Civic Institute in Erie, where she provided the primary research management including data entry, analysis in SPSS or Excel, graphing results, report drafting, and preparing presentations,

conducted secondary research via web and journal searches and compiled reports on topics relevant to local community organizations.

## **ROBIN MCALEER**



As SSI's Project Coordinator, Robin is responsible for supporting the project managers by utilizing her expertise in project editing and proofing, assisting with research and data collection, setting up and conducting interviews, and using her organizational and forward-thinking skills to assist with any and all other office projects. Robin was instrumental in assisting with meeting all 15 2013 Community Health Needs Assessment project deadlines.

Prior to working at SSI, Robin worked as a shift leader at a local cooperative in Erie, lived in Hawaii for three years, and worked at a nonprofit museum in Upstate New York as their Curatorial Assistant, where she helped design exhibits, gave tours, helped with set-up and coordination for yearly events, organized, and analyzed data to help with marketing, as well as help run the museum gift shop.

Robin received her undergraduate degree in World History from the University at Albany. She enjoys being outdoors and rescuing animals.