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**West Virginia
Division of Natural Resources**



**Strategic Plan Development and
Facilitation Services**

Solicitation: DNR 1800000033

Submitted: February 12, 2018

Technical Proposal

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EXECUTIVE ADVANTAGE LLC

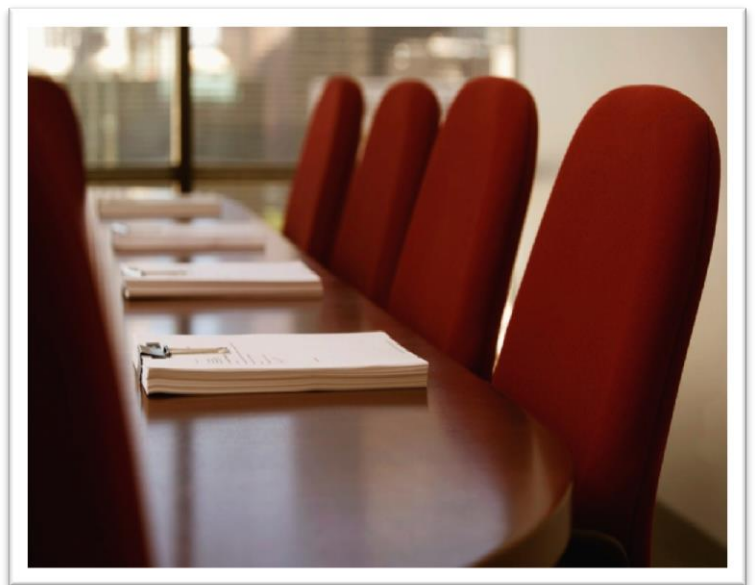


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Introduction

The West Virginia Division of Natural Resources (WVDNR) plays a critical role in stewarding the precious natural resources within the State. For such important and varied work, it is essential that WVDNR develop a relevant direction, a set of targeted strategic goals, clear actions, and measurement criteria to position the agency to function successfully.

The Executive Advantage Difference

We believe that Executive Advantage, LLC is uniquely qualified to partner with WVDNR for this project. The firm's leader (and project lead) June Melvin Mickens, J.D. has a long history of government service and of leading competency-building and cross-disciplinary efforts in a range of settings. Examples of June's background, both prior to and since the launch of Executive Advantage, include:

- Strategic thinking process facilitator for client organizations operating in areas, such as law, technology, youth development, social services, and entertainment. (See e.g., [*Advocates for Justice and Education, 2016 - 2020 Strategic Plan.*](#))
- Former organizational strategic planning workshop facilitator for the U.S. Department of Health and Human Services, Substance Abuse and Mental Health Services Administration (SAMHSA) in SAMHSA's *Changing Communities for the Better Conference* series, guiding nonprofit executives and board leaders through a strategic thinking process framework for use in their organizations.
- Former executive in public-facing arms of the District of Columbia Government—1) Assistant Deputy Attorney General/Deputy Director, Office of the Attorney General, Child Support Enforcement Division and 2) Abuse & Neglect Section Chief, Office of the Corporation Council, Family Services Division.
- Lead consultant to the U.S. Department of Health and Human Services, Office of Child Support Enforcement, 1) in the development of the nation's Family Violence (FV) Indicator policy and process and 2) in the provision of technical assistance to interdisciplinary task forces within all U.S. states and territories in creating their associated FV Indicator programs. (See [*OCSE Action Transmittal AT-98-27, Question 4.*](#))
- Director for a State Justice Institute-funded program to facilitate a workgroup of federal, state, and tribal leaders to develop model intergovernmental agreement terms for the establishment and enforcement of child support for Native American children. (See [*Toward a Common Goal.*](#))
- Lead consultant in an effort by SAMHSA to increase community-based, interdisciplinary prevention and recovery support efforts related to substance abuse and mental health matters.

(See SAMHSA, *One Voice, One Community: Building Strong and Effective Partnerships among Community and Faith Organizations* ([video series](#)) ([book](#)).)

- Lead consultant in a pilot National Black Child Development Institute project, funded by the Annie E. Casey Foundation, to increase the use of social indicators data in grass roots advocacy around child care and child welfare in two sites—New York, NY and Seattle, WA.
- Project director for the American Bar Association Center on Children and the Law, providing technical assistance and training to government agencies, bar associations, judicial education bodies, etc. nationwide in child support, child welfare, and domestic violence program areas.
- Adjunct instructor at the University of Maryland University College's Graduate School, teaching *Leading in the Multicultural Global Environment*—a core course in the MBA program.

June is known for her work around interdisciplinary engagement among government staff and with other community stakeholders. She also is highly respected as an educator in academia and in workforce training settings. This strong background, coupled with her experience with data collection and analysis; program development, management, and evaluation; as well as her current organizational strategy consulting practice through Executive Advantage, make the firm well-positioned to support WVDNR in this strategic planning endeavor.

Scope of Work

At Executive Advantage, we assist clients to think strategically about their operations and, from that thinking, to develop realistic and actionable approaches for advancing organization-wide and program-specific goals. We utilize a process that leads clients from unbiased current-state analysis, to concept development or refinement, to program/process mapping, to stakeholder feedback and buy-in, to implementation, and on to success measurement and continual improvement. We are pleased that our strategy methodology nicely aligns with WVDNR's anticipated approach, and we offer an overview of our plan below.

<i>West Virginia Division of Natural Resources Strategic Plan and Facilitation Services Project Overview</i>		
<i>Task</i>	<i>Potential Dates</i>	<i>Description</i>
Program Administration		
A.1	Week of March 5, 2018	<i>Introductory Meeting</i>
A.2	Week of March 12, 2018	<i>Project Work Plan Finalization</i>
A.3	March - November 2018	<i>Communication Support</i>
A.4	March - November 2018	<i>Project Updates and Check-In Meetings</i>
A.5	November 2018	<i>Administrative Evaluation and Project-End Report</i>
A.6	Week of November 26, 2018	<i>Project Close-Out Meeting</i>
Task 1	Preliminary Research and Analysis (Current State Benchmarking)	
1.1	March - May 2018	<i>Preliminary Research and Analysis</i>
1.2	March - May 2018	<i>Secondary Research and Analysis</i>
1.3	Week of June 11, 2018	<i>Research Summarization and Retreat Planning Meeting</i>
Task 2	Strategic Planning Meeting Facilitation	
2.1	Weeks of June 18 & 25, 2018	<i>Retreat Agenda Preparation</i>
2.2	Weeks of June 25 & July 2, 2018	<i>Retreat Materials Preparation</i>
2.3	Week of July 16, 2018	<i>Strategic Planning Retreat</i>
2.4	Week of July 23, 2018	<i>Retreat Summary Delivery</i>
Task 3	Strategic Plan Development	
3.1	Week of September 10, 2018	<i>Strategic Plan (Draft 1) Presentation and Dissemination</i>
3.2	Week of September 24, 2018	<i>Strategic Plan (Draft 1) Feedback Meeting and Survey</i>
3.3	Week of October 15, 2018	<i>Strategic Plan (Draft 2) Dissemination</i>
3.4	Week of October 22, 2018	<i>Strategic Plan (Draft 2) Feedback Meeting and Survey</i>
3.5	Week of November 12, 2018	<i>Final Strategic Plan Delivery</i>

Project Administration

An effective project launch and productive client-contractor interaction throughout the engagement are essential for carrying out a process that accomplishes program expectations and that operates smoothly and on schedule. Thus, we propose the following Project Administration activities for this strategic planning engagement with WVDNR.

Task A.1: Introductory Meeting

Proposed Timeframe: Week of March 5, 2018



Upon award, Executive Advantage recommends an Introductory Meeting with the WVDNR Director, Mr. McDaniel; the Contract Officer, Ms. Negley; and any others designated. We recommend that this be an onsite meeting.

The Introductory Meeting will serve as an opportunity to begin establishing a solid foundation for the work to come. We expect that meeting topics will include:

- general matters (engagement purpose and expectations, progress reporting, invoicing, etc.);
- program-related administrative issues (logistics, Planning Team composition, project communication planning, etc.); and
- the current WVDNR environment (preliminary discussion of successes and struggles; staff, constituent, and stakeholder perceptions; coordination, improvement, and planning efforts to date; etc.).

Task A.2: Project Work Plan Finalization

Proposed Timeframe: Week of March 12, 2018

Within one (1) week of the Introductory Meeting, Executive Advantage will submit a final, detailed work plan to WVDNR for this engagement. The work plan will update the approach provided in this proposal and will guide our efforts for the remainder of the project. The work plan also will allow WVDNR to monitor ongoing project progress for use in periodic reporting to State officials, staff, and other stakeholders.

Task A.3: Communication Support

Proposed Timeframe: March - November, 2018

Communication is extremely important in efforts of this nature. Great care and attention must be given to the creation and execution of a communication strategy that will assist everyone involved to understand the initiative's purpose, direction, progress, and results. Information-sharing also is essential to generate enthusiasm and to foster a level of commitment that will convert what easily could

become simply an initiative of the Director's Office into an effort that is understood and embraced agency wide.

Executive Advantage is poised to support WVDNR to develop and implement a communication strategy for use with agency personnel and other critical stakeholders regarding the initiative's purpose and process; staff involvement in data collection; progress reporting; as well as findings, the resulting plan, and other recommendations.



Task A.4: Project Updates and Check-In Meetings

Proposed Timeframe: March - November, 2018

At Executive Advantage, we view strong relationships with our clients as critically important. Accordingly, we build quality control and open communication mechanisms into each engagement.

A.4.1 Update Reports – Throughout the engagement, Executive Advantage will provide WVDNR with periodic project updates. Beginning in April 2018 (Month 2), we will submit a brief progress report to Mr. McDaniel (or his designee) and Ms. Negley by the 10th of the month, or other mutually agreed upon date, regarding prior month program activity.

A.4.2 Check-In Meetings – Besides monthly reports, we also recommend holding monthly check-in meetings with Mr. McDaniel (or his designee) and/or Ms. Negley to discuss project progress and to ensure that our work is meeting, if not exceeding, expectations. We prefer to hold check-ins in person, whenever possible and, thus, will seek to schedule meetings to coincide with our onsite visits; in the other months, check-in meetings will take place via virtual meeting technology. Further, we encourage clients to communicate with us freely, beginning on Project Day 1, in order to keep the lines of communication open for timely and meaningful interaction.

Task A.5: Administrative Evaluation and Project-End Report

Proposed Timeframe: November 2018

Near the end of the engagement, Executive Advantage will seek feedback from Mr. McDaniel (or his designee), Ms. Negley, and others as requested. Our goal will be to gather impressions from key WVDNR contacts regarding their interaction with our firm around project management and other administrative matters.

Executive Advantage will compile a project-end report, which will include an overview of program activities as well as a summary of Planning Team feedback and the client evaluation. We will submit this summary to WVDNR, along with the final strategic plan, in advance of the Project Close-Out Meeting.

Task A.6: Project Close-Out Meeting

Proposed Timeframe: Week of November 26, 2018

During the final month of the engagement, Executive Advantage will meet with Mr. McDaniel, Ms. Negley, and any others designated for a Project Close-Out Meeting. This meeting will provide a final opportunity to discuss the contract experience, client and participant feedback, and any other ending matters related to the project. We propose holding this session as a web conference.

PROJECT ADMINISTRATION ACTIVITIES AND DELIVERABLES

- A.1 Introductory Meeting (*onsite; includes travel for one (1) EA staff member and meeting participation*)
- A.2 Project Work Plan Finalization
Deliverable:
 - Project Work Plan
- A.3 Communication Support
- A.4 Project Updates and Check-In Meetings
Deliverables:
 - 7 Monthly Status Reports
 - 7 Monthly Project Check-In Meetings (*onsite or virtual*)
 - Ad Hoc Client Interaction (*onsite or virtual*)
- A.5 Administrative Evaluation and Project-End Report
Deliverable:
 - Project-End Report
- A.6 Project Close-Out Meeting (*virtual*)

Task 1: Preliminary Research and Analysis (Current State Benchmarking)

Executive Advantage believes that, in many respects, the accurate assessment of an organization's current state is one of the most critical aspects of the strategic planning process. Through our experience, we find that many strategic planning initiatives focus disproportionately on the future, without adequately considering the organization's current position in a realistic, unbiased, and nonjudgmental way. However, we are pleased to see a current state assessment of the WVDNR environment highlighted as a necessary component in this strategic planning effort.

Task 1.1 Preliminary Research and Analysis

Proposed Timeframe: March - May, 2018

Executive Advantage has devised a two-pronged preliminary research and analysis approach for the WVDNR strategic planning project.

1.1.1 Staff-Level Assessment (Where Do We Stand?) – Although many strategic planning efforts occur with little attention to data, those that do evaluate an entity's current status typically do so from an executive perspective. We contend, however, limiting the current-state analysis provides an incomplete picture. We have found that it is equally useful to gather input regarding how staff members see the

organization, its direction, its mission-advancement strategies, and a range of other matters that impact their ability and willingness to do the work at hand.

To perform this type of staff-level assessment, Executive Advantage utilizes the *Where Do We Stand?* diagnostic tool. This is an online instrument that solicits feedback from staff throughout an organization. By using this process, an organization is better able to focus its strategy development, communication, execution, and improvement efforts on areas needing the most attention. Through the data gathered, leaders are able to grasp organizational strength areas to be leveraged for greater success as well as challenge areas that could impede progress.

The *Where Do We Stand?* instrument is an easy-to-complete online tool, written at a general staff level. It focuses on seven areas widely accepted as the keys to an entity's effectiveness:

- Leadership
- Strategic Planning
- Customer Focus
- Measurement, Analysis, and Knowledge Management
- Workforce Focus
- Operations Focus
- Results

We propose inviting all staff (825 full-time and 1,000 temporary) to provide input over a 4-week response window (April 2 - 27, 2018). Based on the feedback provided, Executive Advantage will prepare an assessment summary report to share at the Retreat.

1.1.2 Pre-Retreat Interviews – In the second part of the preliminary research phase, Executive Advantage will connect with Planning Team members in advance of the Retreat. Pre-meeting time with participants allows us engage with them in a bit more depth than permitted through an online survey. We are able to learn their individual perceptions of the organization, its direction, and a range of related matters that impact their ability and willingness to participate actively in the Retreat, to lead the work that lies ahead, and to foster the desired environment both while onsite for the Retreat and thereafter. The interviews also permit the participant and facilitator to begin to develop rapport in advance of the onsite session.

Executive Advantage will conduct telephone interviews with each individual (40 - 50 individuals as noted in WVDNR solicitation documents). These calls will be roughly 30 minutes in length and also will occur during the April 2 - 27, 2018 period. Again, we will prepare a summary of key areas highlighted from these conversations for use by the team during the Retreat.



Task 1.2 Secondary Research and Analysis

Proposed Timeframe: March - May 2018

The Introductory Meeting will provide an excellent opportunity to begin gathering information and materials that will be useful to the secondary research and analysis phase of the strategic planning initiative. We expect to discuss, and possibly secure, reports, program materials, and other documents that will shed light on both the current WVDNR and state natural resources environment.

Further, the research begun onsite with the Introductory Meeting will continue throughout the early months of the engagement. In this phase of work, Executive Advantage will conduct a thorough study related to West Virginia's natural resources and of natural resources stewardship efforts going on across the country. This assessment will include an analysis of information, such as:

- WVDNR stakeholder feedback
- WVDNR progress reports and other documentation
- Sister-state trend/best practice reporting
- Federal trend/best-practice reporting

We will compile this information into a summary to share with the Planning Team.

TASK 1 (PRELIMINARY RESEARCH AND ANALYSIS) ACTIVITIES AND DELIVERABLES

- 1.1 Preliminary Research and Analysis
Deliverables:
 - *Where Do We Stand?* Assessment and Summary (approx. 1,825 staff)
 - Pre-Retreat Interviews and Summary (approx. 50 interviews)
- 1.2 Secondary Research and Analysis
Deliverables:
 - Document Review and Summary Report
- 1.3 Research Summarization and Retreat Planning Meeting (onsite; includes travel for one (1) EA staff member, meeting set-up, facilitation, and tear-down)
Deliverables:
 - Meeting Agenda, Presentation, and Materials
 - Proposed Retreat Session Map

Task 1.3 Research Summarization and Retreat Planning Meeting

Proposed Timeframe: Week of June 11, 2018

Using the information gleaned through the all-staff survey, the Planning Team interviews, and the secondary research, Executive Advantage will prepare both a research summary as well as an initial session map for the Retreat. We propose holding an onsite meeting with Mr. McDaniel (or his designee) to discuss and analyze the research on organizational health, WVDNR strengths and challenges, as well as potential focus areas for Planning Team discussion. We also will explain the initial version of the Retreat session map as well as consider Retreat logistics.

Task 2: Strategic Planning Meeting Facilitation

To facilitate the WVDNR Strategic Planning Retreat, Executive Advantage envisions the following approach.

Task 2.1 Retreat Agenda Preparation

Proposed Timeframe: Weeks of June 18 & 25, 2018

Based on the feedback received at the Research Summarization and Retreat Planning Meeting, we will complete preparation of the Retreat agenda. We will present the final document to Mr. McDaniel for review and request approval within three (3) business days of submission.

Task 2.2 Retreat Materials Preparation

Proposed Timeframe: Weeks of June 25 & July 2, 2018

With Mr. McDaniel's approval of the Retreat agenda, we will finalize our Retreat presentation and the participant materials. We also will coordinate with the WVDNR points-of-contact to finalize Retreat logistics.

Task 2.3 Strategic Planning Retreat

Proposed Timeframe: Week of July 16, 2018

Executive Advantage proposes conducting a two (2)-day Retreat with the Planning Team. As the initial meeting for the group, the Retreat has several purposes.

2.3.1 Process Introduction – At the start of the Retreat, a number of preliminary matters will be addressed.

- This meeting segment will allow Mr. McDaniel to relay to participants, as a group, his expectations for the process and to outline the commitment needed from each of them, and from the functional areas they represent, for a successful effort.
- The meeting will provide the first face-to-face engagement with the facilitator and allows her to overview the strategic planning process formally, to guide the team in establishing ground rules for their work together, and to distribute participant materials.
- Participants are able to ask questions and to clarify their understanding about the engagement, the strategic planning process, and their roles as individuals and/or as functional area representatives.
- Finally, the meeting provides an opportunity for teambuilding, which is of critical importance to the ongoing work of the



group—both during the planning process and the implementation period—in order to achieve plan outcomes.

2.3.2 Foundation Check – A second focus will be re-examination of WVDNR’s foundational principles—the agency’s mission, vision, and values. Revisiting these organizational essentials helps to establish or reinforce a common, fundamental view of WVDNR. This initial approach also is effective for focusing the group’s attention and energy as it prepares for the work ahead.

2.3.3 Data Examination and Application – Another Retreat segment will be dedicated to examining the WVDNR current state summary. Executive Advantage will present the preliminary research results to assist the team in grasping the big-picture of the agency’s operations and environment. Through this examination, the group will begin drawing conclusions about the agency’s current positioning and the focus areas for the long-term accomplishment of its mission.

2.3.4 Organizational Planning – Having completed its earlier work, the Planning Team will move into the last Retreat segment, which features the development of a high-level direction for WVDNR. We find it helpful, at this point, to have groups grapple with four long-term critical success decisions that establish a solid direction for the entity:

1. Goals – the specific organization-level targets to be accomplished in order to advance the mission
2. Priority – the level of importance to be accorded to each goal
3. Strategies – consensus around the high-level approaches to be used in order to accomplish the identified goals
4. Measures – the criteria for determining successful progress and completion of each goal
5. Accountability – the owner and necessary contributors to each goal.

While the group will engage in these discussions at the full-team level, we also find it useful for participants to begin considering the ramifications of the possible direction on their functional areas and on their cross-organizational work as well. Thus, we also will seek to build in time for this level of collaboration to begin to occur at the Retreat.

TASK 2 (STRATEGIC PLANNING MEETING FACILITATION) ACTIVITIES AND DELIVERABLES

- 2.1 Retreat Agenda Preparation
Deliverable:
 - Final WVDNR Strategic Planning Retreat Agenda
- 2.2 Retreat Materials Preparation
Deliverable:
 - Final WVDNR Strategic Planning Retreat Materials
- 2.3 Retreat Facilitation (2-Day Program; 50 participants)
Deliverables:
 - Participant Binders with Retreat Materials
 - Site Logistics Coordination
 - Session Facilitation (onsite; includes travel for two (2) EA staff members, meeting set-up, facilitation, and tear-down)
 - Session-Specific Facilitation Supplies
 - Session Evaluation Process Administration
- 2.4 Retreat Summary
Deliverable:
 - Session Proceedings Summary Report

Task 2.4 Retreat Summary Delivery

Proposed Timeframe: Week of July 23, 2018

Within seven (7) days of the Retreat, Executive Advantage will prepare a summary of Retreat proceedings and Planning Team evaluation results. We will submit this document to WVDNR for final review and approval.

Task 3: Strategic Plan Development

With the initial work of the Planning Team in hand, the final project phase involves incorporating the group's consensus regarding the current-state findings as well as the initial decisions about direction into a plan to guide WVDNR efforts over the next three (3) years. To accomplish these goals, Executive Advantage proposes the following approach for Task 3.



Task 3.1 Strategic Plan (Draft 1) Presentation and Dissemination

Proposed Timeframe: Week of September 10, 2018

Following the Retreat, Executive Advantage will produce Draft 1 of the strategic plan. We believe that it is important to present the first version of any such plan to the client. Thus, we propose delivering the Draft 1 plan at an onsite meeting that will allow us to outline the plan's content and to engage in conversation with Mr. McDaniel and other invited WVDNR representatives around initial impressions, areas needing clarification, etc.

Task 3.2 Strategic Plan (Draft 1) Feedback Meeting and Survey

Proposed Timeframe: Week of September 24, 2018

In our work with clients, we find that the period following release of the first draft of a strategic plan or redesigned process is an exciting time. Actually seeing the revised strategy on paper tends to spark a wave of additional ideas and refinement recommendations from those who have been involved in the planning process.

Accordingly, following dissemination of the Draft 1 plan, Executive Advantage will reconvene the Planning Team for a virtual meeting (approximately 2 hours) to discuss the draft plan. We also will distribute an online feedback form to group members after this meeting so that they can log additional reactions to the plan's first draft and to new ideas that arose during the meeting.

Task 3.3 Strategic Plan (Draft 2) Dissemination

Proposed Timeframe: Week of October 15, 2018

From the Planning Team's live and electronic input, Executive Advantage will generate Draft 2 of the strategic plan. This updated draft will be distributed to team members, with a copy to Mr. McDaniel.

Task 3.4 Strategic Plan (Draft 2) Feedback Meeting and Survey

Proposed Timeframe: Week of October 22, 2018

The Planning Team will meet once more (virtual) during the Week of October 22, 2018. The meeting's intent will be to solicit any new thinking about the strategic plan so that adjustments can be made before the plan's finalization. As with the earlier feedback session, we will expect a two (2)-hour session and also distribute an online feedback form after the meeting to enable group members to provide comments using that methodology as well.

Task 3.5 Final Strategic Plan Delivery

Proposed Timeframe: Week of November 12, 2018

Following the feedback on Draft 2, Executive Advantage will prepare the final WVDNR strategic plan document for delivery to Mr. McDaniel, Ms. Negley, and Planning Team members.

We note that, while not a part of this engagement, Executive Advantage also is available as a facilitator to support WVDNR in its efforts to execute the resulting plan; to support appropriate adjustments; and to monitor, capture, and communicate progress throughout the implementation period.

TASK 3 (STRATEGIC PLAN DEVELOPMENT) ACTIVITIES AND DELIVERABLES

3.1 Strategic Plan (Draft 1) Presentation and Dissemination

Deliverables:

- Strategic Plan (Draft 1)
- Meeting Preparation – Agenda, Presentation, and Materials
- Strategic Plan Presentation Meeting *(onsite; includes travel for one (1) EA staff member, meeting set-up, facilitation, and tear-down)*

3.2 Strategic Plan (Draft 1) Feedback Meeting and Survey

Deliverables:

- Meeting Preparation – Agenda, Presentation, and Materials
- Virtual Meeting Hosting, Facilitation, and Notetaking
- Post-Session Draft 1 Online Feedback Form

3.3 Strategic Plan (Draft 2) Dissemination

3.4 Strategic Plan (Draft 2) Feedback Meeting and Survey

Deliverables:

- Meeting Preparation – Agenda, Presentation, and Materials
- Virtual Meeting Hosting, Facilitation, and Notetaking
- Post-Session Draft 2 Online Feedback Form

3.5 Final Strategic Plan Delivery

Background & Experience

Executive Advantage, LLC is a management consulting and professional development firm, based in Bethesda, Maryland (www.execadvantagellc.com). We are a disadvantaged minority-owned and operated firm. Executive Advantage is registered in the U.S. federal government's System for Award Management (SAM). We also participate in the Maryland Small Business Reserve Program as well as the Montgomery County (Maryland) Local and Small Business Reserve Program.

At Executive Advantage, we focus on maximizing the success both of organizations and individual professionals. We partner with leaders in government, business, and education to build or reinforce healthy, well-functioning organizations, where goals are met and people thrive.

Client Services – Executive Advantage assists clients in three key areas:

- **Strategy** – The firm provides strategic planning support for organizations. We help clients to develop business and/or program strategies and to set priorities. We also provide thought partnership and accountability support as clients implement their plans. In addition to our work on an organization-wide basis, the firm offers support to ensure consistency with the planning for departments or sub-units so that everyone throughout an organization is moving in the same direction, although carrying out different functions.
- **Process** – Executive Advantage helps organizational clients to enhance their administrative operations so that they can function more efficiently and effectively. We teach clients approaches for examining *how* they function so that they are able to carry out their operations in ways that maximize efficiency—speeding up processes and/or eliminating steps that carry a cost but do not add value. We also help clients to build quality management into their processes from start to finish, so that assuring quality becomes everyone's job and not just an oversight responsibility relegated to the end of a process, where the cost of correction increases exponentially.

A SNAPSHOT OF EXECUTIVE ADVANTAGE

Key NAICS Codes:

611430, 611710, 541611, 541612,
541614, 541618, 541990

Key Consulting Areas Include:

Strategic Support

- Organization Foundation Development (Mission, Vision, & Values)
- Organization Assessment and Analysis
- Organization-Wide Strategic Thinking and Plan Development
- Department- and Team-Level Planning
- Plan Implementation & Tracking
- Retreat & Meeting Facilitation

Business Process Support

- Process Development & Improvement
- Cycle-Time Reduction
- Quality & Efficiency Enhancement

Professional Development Support

- Leadership Development & Coaching
- Supervisor Development & Coaching
- Team Enhancement
- Workshop Facilitation
 - Goal Setting
 - Communication Skills
 - Decision Making
 - Customer Loyalty
 - Time Management
 - Culture Building
 - And MORE...

- **People** – Clients engage Executive Advantage for assistance to improve the human dimensions of their operations—those people-related matters that often impede the ability to meet organizational or professional goals or that simply continue people’s professional development. In this area, the firm partners with clients on a one-on-one basis or with teams of executives, managers, or staff to help them improve skills, continue growth, and/or address performance and attitude-based obstacles. Often the focus is in areas, such as leadership, communication, collaboration, goal setting, decision making, talent management and peak performance, culture analysis and enhancement, customer/service-recipient loyalty, and time management. We also support individuals through executive, leadership, and other coaching engagements as they seek to know themselves better, build on their strengths, overcome challenges, improve planning, and increase their ability to achieve results as individuals and in leadership roles.

Information Sharing – Additionally, Executive Advantage is dedicated to building the knowledge base within the marketplace and in the community at large. For instance, the firm has launched a complimentary, monthly electronic newsletter and an online video series. Both products include short informational offerings on topics, such as leadership, management, process improvement, professional and personal growth, and other areas critical to leaders’ personal success and that of the organizations they lead. (Feel free to view past [EA Insights](#) editions or the firm’s [Straight Talk!](#) video sessions on our website.)

Project Staffing

Executive Advantage will dedicate a three-person team to the WVDNR project. In addition to an Administrative Assistant, who will take notes at the Retreat, the following key staff will support our work.

June Melvin Mickens: An Overview

June Melvin Mickens is the President & CEO of Executive Advantage. For the WVDNR engagement, June will serve as:

- Project Manager (progress reporting; client support)
- Researcher
- Retreat Facilitator

June is the President & CEO of Executive Advantage. She brings to the WVDNR engagement a 30+-year capacity building and consulting background, as well as senior-level and executive experience in a range of organizational environments. In brief, June is certified by Resource Associates Corporation (RAC) in its International Network of Senior-Level Business and Executive Development Affiliates. She also has earned RAC's Certified Quality Facilitator designation, which equips her to partner with organizations to help them solve business challenges and achieve higher levels of functional success.

Immediately before launching Executive Advantage, June was Chief Administrative Officer and Director of Organizational Communication at Social & Scientific Systems, Inc.—a global public health firm. There, in addition to holding corporate responsibility as a part of the company's Executive Officers team, she had the Senior Vice Presidents or Directors of the company's communications, facilities, human resources, and information technology business units as her direct reports.

Previously, June served as President of JMM Consulting, and she has held executive or senior leadership positions with the District of Columbia Office of the Attorney General (formerly, the Office of the Corporation Counsel), the National Association of Black Accountants, Service Design Associates/Tier Technologies, and the American Bar Association Center on Children and the Law. She was an adjunct professor for several years at the Howard University School of Social Work, teaching a popular graduate-level class on *Child Welfare & the Law*, and now is a member of the MBA-program faculty at the University of Maryland University College to teach *Leading in the Multicultural Global Environment*.

Over the years, June has provided high-quality consulting, coaching, and training support to the U.S. Department of Health and Human Services, the Broadcasting Board of Governors, the District of Columbia Government, the National Black Child Development Institute, National 4-H Council, and many others. Through staff positions or consultancies, she has developed curricula; has provided research, evaluation, and other technical assistance to staff-, member-, government-, and volunteer-based organizations; has managed projects; and has been responsible for membership relations, grass-roots advocacy, and multi-disciplinary collaboration within the government, across governments, and between the government and private sector. June has authored numerous articles and texts and has spoken to audiences nationwide on topics related to capacity-building for government agencies and family law practitioners, originally specializing in matters related to child support, abuse and neglect, and family violence. Following key executive and senior management roles, however, she now is an active partner, speaker, and coach on matters concerning leadership, strategic and business planning, organizational communication, customer service, change management, and process improvement.

June earned a Bachelor of Arts degree in English from Wellesley College and Juris Doctorate degree from the University of Pennsylvania. Though currently inactive, she is a member of the District of Columbia, New Jersey, and Pennsylvania bars. She also has been invited to serve on the Chief Learning Officer Business Intelligence Board and on the Human Capital Executive Research Board.

Lawrence Mickens: An Overview

Lawrence Mickens will serve as:

- Accounting Manager
- Media Manager
- Graphics Designer
- Operations Manager

In brief, Lawrence brings a two-pronged skillset to Executive Advantage work. As Operations Director, he is responsible for all administrative functions within the firm, including accounting and billing matters. Lawrence's more than 20 years with direct and staff oversight of accounts, collections, and claims in the insurance industry, before joining Executive Advantage, prepared him well for the accounting, client relations, and other directorial aspects of this current operations role.

Additionally, Lawrence offers a unique passion that is of tremendous value to Executive Advantage and its clients. He is a gifted technical artist—skills honed over the years through experience in recording engineering, stage lighting, and graphic design endeavors and roles. He currently uses those skills as Assistant Technical Director, as well as lead Lighting and Stage Graphics Designer, at Bridgeway Community Church in Columbia, Maryland. To our benefit, though, he also is the primary architect of the visual and technology-related aspects of all Executive Advantage media, presentations, materials, and other products, which serves to make our offerings as engaging in appearance as in content.

Executive Advantage: Recent Related Experience

Over the years, the work of June Mickens, and now Executive Advantage, has supported a range of entities to develop staff capacity and to improve functioning. Below are examples of recent work with government entities, national organizations, universities, and others around organizational mission, vision, and values setting; strategy development; organizational strengthening; and similar support.

SAMPLE #1 (Executive Consulting Support/National Nonprofit)	
DATE	2012 - 2015; 2016 - present
ENTITY	National 4-H Council
SITUATION	<p>Affiliated with the U.S. Department of Agriculture, 4-H is the nation's largest youth development organization and has a presence in more than 70 countries. National 4-H Council is the nonprofit partner of 4-H. Council supports international, national, and state 4-H programs with a focus on fundraising, brand management, communication, and legal/fiduciary services.</p> <p>In 2012, Council was preparing for significant growth and recognized the importance of thinking strategically about the human aspects of the upcoming changes. That need prompted the initial call to Executive Advantage.</p>
EXECUTIVE ADVANTAGE INVOLVEMENT (DESCRIPTION OF WORK PERFORMED)	<p><i>Executive Human Resource Consulting (2012 - 2013)</i></p> <p>Executive Advantage was selected to work with Council's senior leadership team and its Human Resources (HR) unit. Support during the period included crafting an HR strategic plan, creation of a multi-faceted employee engagement philosophy, development and launch of a quarterly associate engagement survey, update of executive recruitment and selection processes (and the successful hire of an HR Director), preparation of 360° evaluation summary reports for the Chief Executive Officer and Chief Operating Officer, administration of a Board of Trustees climate survey, leadership coaching and strategic thinking support for responsibility-area leaders, and assistance with the navigation of several critical employee relations matters.</p> <p><i>Supervisor Development Program (2013 - 2015)</i></p> <p>During the initial engagement, Executive Advantage developed a framework for Council around healthy organizational culture and associate engagement. Leaders understood that, for the organization to advance according to plan, its infrastructure and workforce needed to be prepared and engaged. To that end, efforts to develop and build employee competencies, to train and support supervisors, and to focus leaders around results were recommended. Executive Advantage was invited to lead the supervisory component of the employee development undertaking, and we launched a 2-year, three-phased effort for the organization's 40+ supervisors.</p> <ul style="list-style-type: none"> • Phase I: <i>Quick Start: The Basics of Supervision at Council</i> (computer-based course) • Phase II: <i>The Supervisor's Role in Culture and Engagement</i> (2-day small-group sessions) • Phase III: <i>Building Supervisor Competencies</i> (360° assessments, bimonthly classes on core supervisory competencies, and scheduled bimonthly and on-call individual coaching) <p><i>Individual Leadership Development Coaching Programs (2013 - Present)</i></p> <p>Council continues to request leadership and staff development support from Executive Advantage for individual personnel. Those engagements include: <i>Comprehensive Leadership Coaching Program</i> (senior staff member, 2013); <i>Team Leadership Coaching/Basic Program</i> (new supervisor, 2016); <i>Career Conversation</i> (mid-level, non-manager, 2016); <i>Managerial Leadership Coaching/Comprehensive Programs</i> (two (2) mid-level managers, 2016-2017); <i>Career Transitions/Basic Program</i> (executive, 2016-2017); <i>Executive Leadership Coaching/Comprehensive Program</i> (newly promoted organization executive, 2017-2018)</p> <p><i>Marketing Team Retreat Facilitation (2014)</i></p> <p>Executive Advantage led Day 1 of a 2-day retreat for Council's Marketing Team. The program was designed to assist the team to think strategically across functions, stakeholder groups, and locations; to develop a general operating plan; and to set communication and</p>

	<p>socialization strategies to advance plan implementation.</p> <p><i>Customer Service Workshop Overview (2015)</i></p> <p>Executive Advantage provided customer service support for Council's Supply/e-Commerce unit. In preparing for a staff workshop, we worked closely with managers, assessed current customer feedback, engaged in online and telephone "secret shopper" activities, and disseminated a pre-session assessment to staff. We then delivered the <i>Beyond Customer Service</i> workshop (full-day format), covering issues relating to employer expectations, customer needs and wants, the stress involved in performing customer service roles, and the creation of powerful and positive customer connections in a specialty service environment.</p> <p><i>Individual Giving Team Retreat Facilitation (2017)</i></p> <p>Executive Advantage facilitated Day 1 of a 2-day retreat for Council's Individual Giving Team. With several new members, this integral component of Council's Resource Development arm sought support to assist with team formation and collaboration, to create a solid foundation regarding organizational and team mission and values, and to reach consensus regarding current and ongoing work priorities and approaches before engaging in fundraising-specific planning on Day 2.</p>
<p>SAMPLE FEEDBACK</p>	<ul style="list-style-type: none"> • "The [HR strategic] plan is very encompassing and addresses many complex and relevant needs. Thanks for helping to create [it] and for keeping us on this very aggressive track to completion." Senior Leader (08/12) • "June has built a customized management training program for us that is having a great impact on leadership and management competencies. Our strategic focus is an investment in all of our Associates and through this program we are also assigning accountability for what managers can/should do as it relates to engagement, building a positive culture, etc. June has done a great job with this as well as a number of other projects over the course of a few years prior to my arrival here. I definitely encourage you to see the quality of the work she produces!" D. Lehman, Council HR Director (03/14) • "[Most valuable is] the discussion and interactions with other members of the organization. People are feeling empowered and hopeful. I think all this time is being well spent." <i>The Supervisor's Role in Culture & Engagement</i> participant (08/06-08/13) • "[I appreciate] having a chance to share experiences...with others, discuss potential solutions. *** [W]e rarely have the opportunity to get together to discuss real issues in an open and collaborative (non-judgmental) way." <i>The Supervisor's Role in Culture & Engagement</i> participant (08/06-08/13) • "June built a very warm, frank, trusting environment[.] The conversation about ownership got into some really interesting areas that I hadn't thought about very much. [There was] open conversation and collaboration. I enjoyed working with colleagues that I don't see or work with very often. <i>The Supervisor's Role in Culture & Engagement</i> participant (08/06-08/13) • "[This helped in] setting expectations around kindness, conduct, communication with staff and other skills that can be put into practice immediately with the teams we work with.*** June was very engaging and made a long day move quickly." <i>The Supervisor's Role in Culture & Engagement</i> participant (08/20-22/13) • "I found getting to know and interact with others, especially in the role play sessions, the most valuable. I actually found all the modules valuable. [O]ne of my managers [is] in the session, and it will be beneficial for both of us to move our department forward using the tools we cover[.] I am looking forward to more" <i>The Supervisor's Role in Culture & Engagement</i> participant, (08/20-22/13) • "Collaborating with other supervisors [is so valuable]. *** [June is] very good at drawing everyone into [the] discussion, acknowledging those that participated to further motivate

	<p>them to participate.” <i>The Supervisor’s Role in Culture & Engagement</i> participant (08/20-22/13)</p> <ul style="list-style-type: none"> • “I found summarizing the program into the three action items as the most valuable. I came back to work and started immediately on #1. *** Thank you for a very worthwhile 2.5 days of Supervisory Training. I look forward to the Cohort returning to you for more!” <i>The Supervisor’s Role in Culture & Engagement</i> participant (08/20-22/13) • “[The] speaker was very informative, kept the training on time. I’ve probably completed 10 or more personality profiles in my life, including several DISC profiles, but the content in this training was extremely relevant and insightful for understanding, applying the profiles in everyday management, without being too theoretical.” <i>Supervisor Development: Interpersonal Relationships & Dealing with Conflict Effectively</i> participant (01/14/14) • “Thanks again for going through this great information with me[.] I truly enjoyed our time together and have learned so much from you thank you, thank you, thank you!” <i>Management Leadership Process</i> coaching participant (01/24/14) • “[I really liked] the open discussion as we walked through the behavior scenarios, [especially] the loading dock and the new employee.” <i>Supervisor Development: Interpersonal Relationships & Dealing with Conflict Effectively</i> participant (01/29/14) • “[The] 8 step process to addressing interpersonal conflict was excellent!” <i>Supervisor Development: Interpersonal Relationships & Dealing with Conflict Effectively</i> participant (01/29/14) • “[I appreciate] the ability to pause and reflect on real world application. It’s [also] clear that June cares about the individuals participating in the training.” <i>The Supervisor’s Role in Culture & Engagement</i> participant, Chevy Chase, MD (04/04-05/14) • “The material presented was a great tool for communication. I was impressed with the presenter and the examples used were great. Thanks.” <i>Supervisor Development: Communicating for Success</i> participant (10/23/14) • “Having the department participate together and [making] the content relevant to our needs was most valuable. Module 3, “It’s All about Attitude”, was enlightening for many of us. <i>Beyond Customer Service</i> participant (03/05/15) • I do not have one part of the session that I would rate as least valuable. I found all four modules important to the success of the program. <i>Beyond Customer Service</i> participant (03/05/15) • “Excellent. [Most valuable were] all the materials and the Council part too. [I became better at] communication and solving problems in a timely manner.” <i>Team Leadership Process</i> coaching participant (12/19/16) • “Mission & value statement(s) development; mapping (internal) – excellent.” <i>Individual Giving Team Retreat</i> participant (02/13/17) • “I enjoyed learning about the team’s work styles and practical, concrete examples.” <i>Individual Giving Team Retreat</i> participant (02/13/17) • “June is fantastic! Such a clear communicator.” <i>Individual Giving Team Retreat</i> participant (02/13/17)
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SAMPLE #2 (Organizational Strategic Planning Support/Regional Nonprofit)	
DATE	2015 - 2016
ENTITY	Advocates for Justice and Education
SITUATION	<p>AJE is a nonprofit organization, founded in 1996 and located in the District of Columbia. AJE is dedicated to “educat[ing] parents, youth, and the community about the laws governing public education, specifically for children with special needs.”</p> <p>In late 2014, AJE’s Founder/Executive Director stepped down and the organization’s Deputy was chosen to lead the organization. Recognizing the significant transition required to move from a largely operational role into the primary organizational leadership seat, AJE secured a grant from the Meyer Foundation to secure executive coaching support for the newly named Executive Director. With the approval of Meyer, AJE selected Executive Advantage for the 2015 - 2016 executive coaching engagement. Thereafter, AJE’s Board approved the engagement of Executive Advantage to support the 2015 strategic planning efforts.</p>
EXECUTIVE ADVANTAGE INVOLVEMENT (DESCRIPTION OF WORK PERFORMED)	<p><i>Organizational Strategic Planning (2015)</i></p> <p>As AJE leaders prepared for the organization’s 20th anniversary, they recognized the opportunity to engage in strategic thinking about the future. With this in mind, AJE reached out to Executive Advantage to assist with the development of a 5-year strategic plan. We launched a multi-phased approach with AJE that combined work with the Board, managers, and the full staff. It included the following:</p> <ul style="list-style-type: none"> • <i>Task I – Project Launch:</i> We met with the client to solidify the work plan, engagement expectations, and logistics. • <i>Task II – Organizational Assessments:</i> AJE completed both Executive Advantage’s <i>Executive Organizational Assessment</i> and our <i>Where Do We Stand?</i> staff assessment tools in order to gather important background information about the organization’s current state. • <i>Task III – Board Retreat:</i> Executive Advantage facilitated a full-day meeting of AJE’s Board of Directors to refine mission, examine current-state data, set internal and external vision, revisit values, and set high-level direction for the organization. • <i>Task IV – Organization-Level Strategy Development:</i> This phase of the work began with a full-day session with the entire AJE staff to acquaint them with the foundation set by the Board. AJE’s management team then developed organization-level goals for the initial plan year, critical goal categories for subsequent plan years, and performance metrics. • <i>Task V – Departmental Planning and Inter-Departmental Coordination:</i> Management team members worked independently and collectively to develop both department goals and action plans to support the overarching direction and to finalize performance metrics. <p><i>Task VI – Plan Finalization and Communication:</i> Executive Advantage prepared a summary of the AJE strategic plan and supported its presentation to the Board and to the full staff.</p>
SAMPLE FEEDBACK	<ul style="list-style-type: none"> • “The team brainstorming to reconstruct the agency’s mission [was best].” • “[Most valuable for me was] reviewing ‘where we are now’ since I didn’t know any of that information before. Also, reviewing the mission statement.” • “[June was] very positive, well-informed, made me laugh, [and was a] good fit for our team.”

SAMPLE #3 (Organizational Strategic Planning Support/Regional Nonprofit)	
PERIOD	2015
ENTITY	Art Enables
SITUATION	<p>Art Enables is a Washington, DC nonprofit organization that is dedicated to supporting the efforts of adult artists with intellectual and developmental disabilities. At any given time, the organization provides a studio home to roughly 30 artists. Additionally, Art Enables serves as a gallery—curating, exhibiting, marketing, and selling pieces on behalf of the artists.</p> <p>In 2015, Art Enables began its relationship with Executive Advantage by retaining the firm to facilitate its Board of Directors Retreat. The Board’s intention was to engage in strengths-based team building, to reach consensus on a shared organizational vision, and to develop a clearly-defined implementation plan related to the organization’s priorities through 2017.</p>
EXECUTIVE ADVANTAGE INVOLVEMENT (DESCRIPTION OF WORK PERFORMED)	<p><i>Board of Directors’ Strategy Retreat (March 2015)</i></p> <p>Executive Advantage led a 2-day Board Retreat for Art Enables. The firm held pre-retreat interviews with the Board and Executive Director and had each person complete a DISC Index to support the onsite work around team building. Following the pre-session work, June facilitated an interactive and very well-received retreat that exceeded leaders’ expectations.</p> <p><i>Internal Organization Operations Mapping (April - June 2015)</i></p> <p>One retreat revelation for Board members was that they lacked sufficient knowledge about the organization’s infrastructure to set a realistic direction. Accordingly, Executive Advantage was engaged to provide continued consulting support. The firm worked with staff and Board leaders to 1) examine and map out current internal functioning and 2) determine where opportunities existed to improve operations through greater efficiencies, human capital adjustments, and/or changes to the current complement of services, events, and/or initiatives. A final report was submitted to the organization in June 2015.</p>
SAMPLE FEEDBACK	<ul style="list-style-type: none"> • “[Thank you for] helping us move from mission to vision to goals to actions.” (03/15) • “Thank you for the whole board retreat. It went REALLY well. I am so pleased to see the feedback from everyone. It also highlighted a few things to incorporate into board meetings.” (04/15) • “I was incredibly surprised with how well the meeting went. ***It all went smoothly. The interviews were very important. People were happy that the interviews actually resulted in some program changes that helped us. They also began to realize that the interpersonal elements were important.” (04/15)

SAMPLE #4 (Strategy & Process Mapping Support/Regional Nonprofit)	
DATE	2011 - 2012
ENTITY	Bridgeway Community Church
SITUATION	Bridgeway is a constantly expanding body that, at the time of the first engagement, hosted roughly 3,000 people weekly in three Sunday services. However, the church recognized missed opportunities with the operation and the customer service components of its welcome and lobby environment.
EXECUTIVE ADVANTAGE INVOLVEMENT (DESCRIPTION OF WORK PERFORMED)	<p><i>Lobby/Welcome Function Process Improvement</i></p> <p>Bridgeway realized that, given the multiple uses of its main building's lobby space, it needed consulting support to maximize space usage and to assess the variety of functions carried out there and in adjoining spaces.</p> <p>After an earlier customer-service training engagement, the church re-enlisted Executive Advantage to provide two-fold assistance. We facilitated a process improvement initiative with a diverse workgroup to develop and launch a new, integrated approach 1) for welcoming people on Sundays and during special events and 2) for helping attenders to make connections with the church's various ministries, resources, and activities. We also provided consulting support for the year following the launch of the new initiative. During the follow-on support, we served as a strategic thought partner for leaders regarding outcome measurement, continued benchmarking, and process adjustment; we also provided in-service customer service training for the volunteer staff and process implementation team.</p>
SAMPLE FEEDBACK	<ul style="list-style-type: none"> • "June Mickens is an outstanding facilitator and consultant. We used her for a staff training on customer service and got rave reviews. We've seen attitudes greatly affected as a result." Executive Pastor, re <i>Beyond Customer Loyalty Workshop</i> (05/11) • "June and Executive Advantage partnered with Bridgeway [a second time] to facilitate the building of a process from A-Z that would offer excellent customer care to the 3,000 people that attend services on Sunday. June didn't miss a detail while keeping the team motivated and on task. I highly recommend June for any strategic planning or executive coaching assignment." Lobby Workgroup Lead, Director of In-Reach Ministries (06/12)

SAMPLE #5 (Strategy Support; Program & Curriculum Development; Program Monitoring/U.S. Government)	
DATE	2009 - 2012
ENTITY	U.S. Department of Health & Human Services Substance Abuse & Mental Health Services Administration (SAMHSA)
SITUATION	SAMHSA has provided significant levels of technical assistance to state and local governments as well as to community- and faith-based organizations for many years to equip them to build sustainable organizations.
EXECUTIVE ADVANTAGE INVOLVEMENT (DESCRIPTION OF WORK PERFORMED)	<p><i>Changing Communities for the Better Conference Series (2009 - 2010)</i> This was a series of 3-day workshops for community- and faith-based organization leaders. They were offered at the state level and targeted issues of critical importance for developing strong organizational infrastructures. June presented organizational strategic planning workshops in the series. Her highly rated sessions familiarized executive- and board-level leaders with the components of strategic thinking and provided them with a process framework for undertaking realistic planning initiatives within their own organizations that were designed to yield successful implementation results. June led workshops in Arkansas, Delaware, Hawaii, Massachusetts, Tennessee, and Texas. Sessions averaged 60 leaders per site.</p> <p><i>Community Leaders and Interfaith Partnership Summits (2010 - 2012)</i> The onsite <i>Changing Communities</i> workshops, noted above, offered many engagement and capacity-building opportunities; yet SAMHSA recognized drawbacks in that approach and desired to make more deep-rooted inroads into U.S. communities. Thus, in 2010, the Agency began bringing cross-disciplinary teams of local leaders to the Washington, D.C. area for initial meetings that would launch an intensive partnership with each community. Each “summit” involved roughly 15 communities and focused on the development of local, inter-organizational collaborative strategies to support substance abuse/mental health recovery. June served as a primary strategic thought partner for the SAMHSA Project Officer in planning and convening the 2010, 2011, and 2012 <i>Community Leaders & Interfaith Partnership Summits</i>. Besides her strategic support in program planning and agenda development, June also created the community team approach for each meeting. That work entailed producing the facilitator and participant curricula for each summit; the provision of pre-summit training and onsite guidance to the team facilitators; and oversight of the 7+ hours of onsite community-team facilitated activities during each 3-day summit.</p> <p><i>Technical Assistance and Training for Grassroots Faith and Community Based Organizations Project (2010 - 2012)</i> The 2010 Summit’s success encouraged SAMHSA to continue its strategic work with the original communities and with those added following the 2011 and 2012 Summits. June’s success in her strategic support roles with SAMHSA and the community leaders in connection with the 2010 Summit led to her being invited to assume the pivotal role of Community Team Strategy Coordinator for the follow-on effort. Thus, she served as the point person for the team leads and the community-based facilitators, providing organizational strategy coaching, onsite and remote facilitation assistance, other technical support, and progress monitoring as these inter-disciplinary community groups continued to develop and/or advance their local collaborative efforts. June stepped aside after the 2012 Summit.</p>

<p>SAMPLE FEEDBACK</p>	<ul style="list-style-type: none"> • “June's presentation was very informative. She took questions and answered them in an informed & professional manner. She has an excellent delivery that is focused and attention-getting.” <i>Strategic Planning</i> workshop participant, Memphis, TN (04/10) • “Very detailed, concise, & clear, which makes it ...‘doable.’ We'll be able to implement!” <i>Strategic Planning</i> workshop participant, Dallas, TX (05/10) • “June, [j]ust wanted to say, you have done us proud. Thank you for the well thought out work.” SAMHSA Government Project Officer re <i>2010 Community Leaders & Interfaith Partnership Summit</i> (03/10) • “June, [j]ust wanted to thank you for all your hard work.... I have been involved in too many conferences to know that the work isn’t easy but you made it look that way.” Summit Facilitator, <i>2010 Community Leaders & Interfaith Partnership Summit</i> (05/10) • “June, [y]ou are a consummate professional whose leadership efforts established a new standard for effectively engaging community partnership networks. Excellent Job!” Summit Facilitator, <i>2010 Community Leaders & Interfaith Partnership Summit</i> (05/10) • “We had our project team check-in with June Mickens. This allowed the group that went to Maryland to connect with those who were unable to attend. June did a phenomenal job of 1) helping people understand what is required by SAMHSA and 2) ironing out some clarifying concerns...about choosing a [local facilitator].” Boston Coalition Leader (12/11) • “Thank you! Your wisdom and support is always timely and precise; I am truly grateful. *** Everyone has a tremendous amount of respect for you. [Also,] thank you for taking the time to coach me today. I am blessed and honored to have you in my life. You know how to ask the right questions and I deeply appreciate it. *** Thank you for helping me to prepare for the meeting and for helping me begin clarifying what [comes next]. Again, I am so grateful for your support....” Houston Coalition Facilitator (06/12)
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ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.:

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

(Check the box next to each addendum received)

- ☒ Addendum No. 1
- ☐ Addendum No. 2
- ☐ Addendum No. 3
- ☐ Addendum No. 4
- ☐ Addendum No. 5

- ☐ Addendum No. 6
- ☐ Addendum No. 7
- ☐ Addendum No. 8
- ☐ Addendum No. 9
- ☐ Addendum No. 10

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

Executive Advantage, LLC

Company

Authorized Signature

02/12/18

Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.

REQUEST FOR QUOTATION
West Virginia Division of Natural Resources-Director's Office
Strategic Plan Development and Facilitation Services

11. MISCELLANEOUS:

- 11.1. Contract Manager:** During its performance of this Contract, Vendor must designate and maintain a primary contract manager responsible for overseeing Vendor's responsibilities under this Contract. The Contract Manager must be available during normal business hours to address any customer service or other issues related to this Contract. Vendor should list its Contract Manager and his or her contact information below.

Contract Manager:	<u>June Melvin Mickens</u>
Telephone Number:	<u>(301) 280-5950</u>
Fax Number:	<u>(301) 657-9776</u>
Email Address:	<u>jmickens@execadvantagellc.com</u>
Mailing Address:	<u>3 Bethesda Metro Center</u>
	<u>Suite 700</u>
	<u>Bethesda, MD 20814</u>

REQUEST FOR QUOTATION
West Virginia Division of Natural Resources
Strategic Plan Development and Facilitation Services
Exhibit A - Pricing Page

Item No.	DESCRIPTION	Unit of Measure	Quantity	Amount
4.1.1	Task I: Preliminary Research and Analysis	Job	1	\$ 18,741.50
4.1.2	Task II: Strategic Planning Meeting Facilitation	Job	1	\$ 10,354.50
4.1.3	Task III: Strategic Plan Development	Job	1	\$ 16,584.00
TOTAL:				\$ 45,680.00

Executive Advantage, LLC

Company Name

Authorized Signature

June Melvin Mickens, President & CEO

02/12/18

Date

STATE OF WEST VIRGINIA
Purchasing Division

PURCHASING AFFIDAVIT

CONSTRUCTION CONTRACTS: Under W. Va. Code § 5-22-1(i), the contracting public entity shall not award a construction contract to any bidder that is known to be in default on any monetary obligation owed to the state or a political subdivision of the state, including, but not limited to, obligations related to payroll taxes, property taxes, sales and use taxes, fire service fees, or other fines or fees.

ALL CONTRACTS: Under W. Va. Code §5A-3-10a, no contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and: (1) the debt owed is an amount greater than one thousand dollars in the aggregate; or (2) the debtor is in employer default.

EXCEPTION: The prohibition listed above does not apply where a vendor has contested any tax administered pursuant to chapter eleven of the W. Va. Code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

DEFINITIONS:

"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

"Employer default" means having an outstanding balance or liability to the old fund or to the uninsured employers' fund or being in policy default, as defined in W. Va. Code § 23-2c-2, failure to maintain mandatory workers' compensation coverage, or failure to fully meet its obligations as a workers' compensation self-insured employer. An employer is not in employer default if it has entered into a repayment agreement with the Insurance Commissioner and remains in compliance with the obligations under the repayment agreement.

"Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceeds five percent of the total contract amount.

AFFIRMATION: By signing this form, the vendor's authorized signer affirms and acknowledges under penalty of law for false swearing (W. Va. Code §61-5-3) that: (1) for construction contracts, the vendor is not in default on any monetary obligation owed to the state or a political subdivision of the state, and (2) for all other contracts, that neither vendor nor any related party owe a debt as defined above and that neither vendor nor any related party are in employer default as defined above, unless the debt or employer default is permitted under the exception above.

WITNESS THE FOLLOWING SIGNATURE:

Vendor's Name: Executive Advantage, LLC

Authorized Signature: [Signature]

Date: 02/12/18

State of MD

County of Montgomery, to-wit:

Taken, subscribed, and sworn to before me this 12th day of February, 2018.

My Commission expires _____, 20____.

AFFIX SEAL HERE

PRAVEENA A RAHMAN
NOTARY PUBLIC
MONTGOMERY COUNTY, MARYLAND
My Commission Expires 04-25-2021

[Signature]
Purchasing Affidavit (Revised 01/19/2018)



State of West Virginia
Request For Quotation
Consulting

Procurement Folder : 415527

Document Description : Strategic Plan Development and Facilitation Services

Procurement Type : Agency Purchase Order

Date Issued	Solicitation Closes	Solicitation No			Version	Phase
2018-01-23	2018-02-12 13:30:00	ARFQ	0310	DNR1800000033	1	Final

SUBMIT RESPONSES TO:				VENDOR
BID RESPONSE DIVISION OF NATURAL RESOURCES PROPERTY & PROCUREMENT OFFICE 324 4TH AVE SOUTH CHARLESTON US				Vendor Name, Address and Telephone Executive Advantage, LLC 3 Bethesda Metro Center Suite 700 Bethesda, MD 20814 (301) 280-5950
		WV	25303-1228	

FOR INFORMATION CONTACT THE

Angela W Negley
(304) 558-3397
angela.w.negley@wv.gov

Signature X

FEIN # 61-1574129

DATE 02/12/18

All offers subject to all terms and conditions contained in this solicitation

INVOICE TO		SHIP TO	
DIVISION OF NATURAL RESOURCES ADMINISTRATION -PROPERTY & PROCUREMENT OFFICE 324 4TH AVE SOUTH CHARLESTON WV25303-9730 US		DIVISION OF NATURAL RESOURCES ADMINISTRATION SECTION 324 4TH AVE SOUTH CHARLESTON WV 25303 US	

Line	Commodity Line Description	Qty	Unit Issue	Unit Price	Total Price
3	Strategic Plan Development	1			\$16,584.00

Commodity Code	Manufacturer	Model #	Specification
80101504			

Extended Description
Item No. 4.1.3

SCHEDULE OF EVENTS		
Line	Event	Event Date
1	Technical Question Deadline 9:00 a.m.	2018-01-29

ADDITIONAL INFORMATION:

To establish a contract for strategic planning facilitation and preparation of a multi-year strategic plan that includes preliminary research and analysis, strategic planning meeting facilitation.

INVOICE TO		SHIP TO	
DIVISION OF NATURAL RESOURCES ADMINISTRATION -PROPERTY & PROCUREMENT OFFICE 324 4TH AVE SOUTH CHARLESTON WV25303-9730 US		DIVISION OF NATURAL RESOURCES ADMINISTRATION SECTION 324 4TH AVE SOUTH CHARLESTON WV 25303 US	

Line	Commodity Line Description	Qty	Unit Issue	Unit Price	Total Price
1	Preliminary Research and Analysis	1			\$18,741.50

Commodity Code	Manufacturer	Model #	Specification
80101504			

Extended Description

Item No. 4.1.1

INVOICE TO		SHIP TO	
DIVISION OF NATURAL RESOURCES ADMINISTRATION -PROPERTY & PROCUREMENT OFFICE 324 4TH AVE SOUTH CHARLESTON WV25303-9730 US		DIVISION OF NATURAL RESOURCES ADMINISTRATION SECTION 324 4TH AVE SOUTH CHARLESTON WV 25303 US	

Line	Commodity Line Description	Qty	Unit Issue	Unit Price	Total Price
2	Strategic Planning Meeting Facilitation	1			\$10,354.50

Commodity Code	Manufacturer	Model #	Specification
80101504			

Extended Description

Item No. 4.1.2

DNR1800000033	Document Phase Final	Document Description Strategic Plan Development and Facilitation Services	Page 4 of 4
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ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions



State of West Virginia
Request For Quotation
Consulting

Procurement Folder : 415527

Document Description : Addendum No.1 WVDNR Agency Strategic Plan

Procurement Type : Agency Purchase Order

Date Issued	Solicitation Closes	Solicitation No			Version	Phase
2018-01-31	2018-02-12 13:30:00	ARFQ	0310	DNR1800000033	2	Final

SUBMIT RESPONSES TO:		VENDOR	
BID RESPONSE		Vendor Name, Address and Telephone	
DIVISION OF NATURAL RESOURCES		Executive Advantage, LLC	
PROPERTY & PROCUREMENT OFFICE		3 Bethesda Metro Center	
324 4TH AVE		Suite 700	
SOUTH CHARLESTON		Bethesda, MD 20814	
US		(301) 280-5950	
	WV	25303-1228	

FOR INFORMATION CONTACT THE

Angela W Negley
(304) 558-3397
angela.w.negley@wv.gov

Signature X

FEIN # 61-1574129

DATE 20/12/18

All offers subject to all terms and conditions contained in this solicitation

ADDITIONAL INFORMATION:

Addendum No.01 is issued to publish and distribute the attached information to the Vendor Community.

INVOICE TO		SHIP TO	
DIVISION OF NATURAL RESOURCES ADMINISTRATION -PROPERTY & PROCUREMENT OFFICE 324 4TH AVE SOUTH CHARLESTON WV25303-9730 US		DIVISION OF NATURAL RESOURCES ADMINISTRATION SECTION 324 4TH AVE SOUTH CHARLESTON WV 25303 US	

Line	Commodity Line Description	Qty	Unit Issue	Unit Price	Total Price
1	Preliminary Research and Analysis	1			\$18,741.50

Commodity Code	Manufacturer	Model #	Specification
80101504			

Extended Description

Item No. 4.1.1

INVOICE TO		SHIP TO	
DIVISION OF NATURAL RESOURCES ADMINISTRATION -PROPERTY & PROCUREMENT OFFICE 324 4TH AVE SOUTH CHARLESTON WV25303-9730 US		DIVISION OF NATURAL RESOURCES ADMINISTRATION SECTION 324 4TH AVE SOUTH CHARLESTON WV 25303 US	

Line	Commodity Line Description	Qty	Unit Issue	Unit Price	Total Price
2	Strategic Planning Meeting Facilitation	1			\$10,354.50

Commodity Code	Manufacturer	Model #	Specification
80101504			

Extended Description

Item No. 4.1.2

INVOICE TO		SHIP TO	
DIVISION OF NATURAL RESOURCES ADMINISTRATION -PROPERTY & PROCUREMENT OFFICE 324 4TH AVE SOUTH CHARLESTON WV25303-9730 US		DIVISION OF NATURAL RESOURCES ADMINISTRATION SECTION 324 4TH AVE SOUTH CHARLESTON WV 25303 US	

Line	Commodity Line Description	Qty	Unit Issue	Unit Price	Total Price
3	Strategic Plan Development	1			\$16,584.00

Commodity Code	Manufacturer	Model #	Specification
80101504			

Extended Description

Item No. 4.1.3

SCHEDULE OF EVENTS

Line	Event	Event Date
1	Technical Question Deadline 9:00 a.m.	2018-01-29

DNR1800000033	Document Phase Final	Document Description Addendum No.1 WWDNR Agency Strategic Plan	Page 4 of 4
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ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions