



*"At Last! A firm that listens."*



# **PROJECT ADMINISTRATION SERVICES FOR COLORADO STRATEGIC ACTION PLANNING GROUP ON AGING**

Prepared for: Jim Riesberg, Chair

Prepared by: At Last Communications

September 30, 2015



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Jim Riesberg, Chair  
Colorado Strategic Action Planning Group on Aging  
Denver, Colorado

Management services for the Colorado Strategic Action Planning Group on Aging requires a team that understands public policy, thoughtful analysis, organizational productivity, public outreach and media relations. It also requires a team that is flexible, understands the importance of deadlines, and has the ability to coordinate with several stakeholder groups—all while engendering confidence in their abilities by the Planning Group.

In this proposal, we offer the services of Gene Rose, president of At Last Communications based in Denver, as the Project Administrator, and Amber Minogue of Minogue Consulting in Denver, as Project Assistant. We're confident you will find our abilities a perfect match for the Planning Group.

As the information on the following pages will illustrate, our combined experience of nearly 50 years of working for government agencies and nonprofits gives us valuable perspective on how to make sure the Planning Group achieves its goals and exceeds its expectations. Our track record in managing projects and groups, both in Colorado and across the nation, gives us a unique ability to lead this project.

Our clients' success is predicated on the important values that we've embraced in our journey. We believe in humility, sincerity and the value of listening. While those characteristics lead our approach, creativity, critical thinking and exploration drive it.

As a core value of every project that we partner on, we focus on building the foundational relationships that strengthen team output and produce outstanding results. Our strength lies in our ability to listen, outreach, and connect with our client, building trust and unity for our common goals.

The advantages to hiring our team for this project include our:



- Experience managing and partnering with similar groups
- Knowledge of state government and cross-sector collaboration
- Understanding of policy and analysis
- Track record in the public relations and outreach arena
- Strength in building relationships
- Commitment to deadlines and attention to details
- Flexibility to meet the needs of the Planning Group

The information that follows explains our approach to project management, an explanation for our budget, our qualifications, and other information sought from this solicitation. We are happy to respond to any questions or clarifications as needed.

As any of our clients will attest, personal service is a hallmark of our firm. We work with nonprofit clients across the country, and we are often told that our process, combined with the ability to listen, identify and harness the key needs and potential of organizations, is our strength.

We hope you agree that we're the right team for the project. Thank you for your consideration.

Sincerely yours,

Gene Rose  
President and Founder  
At Last Communications  
Gene@AtLastCommunications.com  
720-355-2933



## B. Project Approach

Colorado's decision to focus on its aging population represents a rare, proactive approach to addressing long-term issues. The governor, legislature and the plan's proponents are to be commended for taking bold action to address an issue that will result in significant changes in the state's economy and the services it will provide. Developing the nation's first comprehensive state strategy on aging is no small task and will require a team that can trigger inspiration and innovation from day one.

In this type of process, in which a new group of individuals is brought in to intensely analyze an issue and come up with cutting-edge solutions, it's critical to have a management group that understands the types of tools, styles and communications necessary to make the organization's work seamless. We are aware of and sensitive to the changing demands on the stakeholders who will lead this Planning Group, and the innovation that is required to be on the forefront of this type of strategic planning. Fundamental to the success of this project will be the ability of the project manager to assess those changing needs and approach them with nimble flexibility. Blending the qualities of resilience and adaptability, our team excels at designing a process that provides thought leaders with the space they need to spark innovation.

Every good project manager knows that the success of the project lies in the ability to maximize the individual strengths of project team members. We know that foundational to building any strong team is a focus on relationships. Gene and Amber will work closely with the Planning Group to harness the individual strengths of each member and then streamline a process that sets forth the most efficient and effective delegation and collaboration of tasks.

More detailed biographies are available in Section D; however, it's important to note that the team has a strong record of public relations and outreach, with extensive experience working on public policy issues, engaging with state and national organizations to create master plans, and working for state legislatures to achieve public policy outcomes.

In our analysis, we see the requirements for the project management services team can



be broken into three areas of focus: Project Management, Reporting, and Public Outreach.



## Project Management

Logistics / Minutes / Records  
Counsel  
Fiscal and Fundraising  
Assets: Analysis and Documentation  
Contractors / Consultants  
Subcommittees / Advisory Groups  
Coordination with Agencies and Groups  
Data Analysis  
Compliance



## Reporting

Production and Distribution of Reports  
Monthly Progress Reports  
Final Plan




## Public Outreach

Public Relations  
Planning Group Website  
External Distributions  
Public Comment


Our approach to these tasks will be:


### 1. Management


 **Logistics / Minutes / Records / Planning** – From the Colorado Office of Early Childhood to the Commission on Adult Basic Education, Gene and Amber have been responsible for managing large groups and committees, scheduling meetings, making accommodations for members, ensuring proper room setup and





coordinating schedules. Both have extensive experience in planning conferences and know about anticipating needs and attending to detailed logistics.

 **Counsel** – The team understands it's the Planning Group's direction and vision that is responsible for the final recommendations. Both, though, have experience in guiding groups work through difficult scenarios and challenging tension points. Gene has led strategic planning exercises for numerous non-profits and public sector clients, and understands group dynamics. His group facilitation is enhanced by his ability to understand when counsel is needed, and when it is not.

 **Fiscal and Fundraising** – Gene supervised the budget of the National Conference of State Legislatures Communication Division—around \$4 million each year— and works currently with clients to draft and manage their budgets. Both Amber and Gene have a combined 25 years of experience with fundraising. In particular, they are both trained and accomplished grant and proposal writers, with experience in developing projects; identifying and researching funding prospects; researching and writing grant proposals; providing grant oversight and delegation; and completing grant reporting.

 **Assets: Analysis & Documentation** – Keeping track of important documents, analysis, resources and other information collected by the Planning Group is an essential responsibility. At Last Communications will take responsibility for storing all information, converting documents as needed to electronic files, and then making all resources available in a manner that will always be easily accessible for Planning Group members.

 **Contractors / Consultants** – As consultants, both Amber and Gene work closely and often with contractors and other consultants. Their process is similar, they work to understand the specific needs of the project and the dynamics of the stakeholders, and then create, adapt and direct teams accordingly.

 **Subcommittees / Advisory Groups** – Working with public sector initiatives and with non-profits, both Gene and Amber have been afforded extensive opportunity to both participate on, and facilitate the actions of Committees, Subcommittees and Advisory Groups. First and foremost, they understand the commitment to the legislature, governor and the people of Colorado is top priority for the Planning Group. Gene and Amber take care of logistics information gathering, education and



all other details so that the Planning Group can focus on their commitment to the people.

- ④ **Coordination with Agencies & Groups** – In collaboration with each community and collective, Gene and Amber work to develop common goals in each community that address their system need by getting to know the individual stakeholders, surveying the community, and then working directly with the stakeholders to come up with tailored approaches to collaboration and coordination.
- ④ **Data Analysis** – With specific expertise in analyzing data and research, Gene and Amber can use their training in understanding and performing data analysis to inform and support the tasks of the Planning Group. Their fundamental understanding of systems building and their experience with supporting policy that informs program implementation has crossed sectors, and will provide the Planning Group a critical understanding of successful strategies within the public policy and government spheres that address the intersections of the complex issues in this innovative strategic planning process.
- ④ **Compliance** – Transparency is at the heart of any successful public initiative, and is achieved through an articulated process with a commitment to outcomes that demonstrate progress towards defined goals. The ability to report on progress and produce outcomes that demonstrate compliance to a contract, a client, a piece of legislation, or any other guiding source, is crucial to maintaining public and client trust. Utilizing process evaluation, our team will establish a timeline and benchmarks that will help inform the process and continually adapt to the changing Planning Group needs, ensuring progress towards the priorities outlined in the legislation.

## 2. Reporting

- ④ **Production and Distribution of Reports** – The team has produced several reports to guide an agency or organization's pathway. Both Amber and Gene have a background working with a diversity of stakeholders. We work to understand our audience and then produce publications that suit the needs of the group. From drafting speaking points, to presenting in front of a legislative committee, to creating white papers that provide evidence and history for understanding complex policy questions, our team has a background in communication across different written and digital media.



- ④ **Monthly Progress Reports** – In their work for clients, reports are a routine part of Gene and Amber's operations. They can be formatted in any manner to best meet the needs of the working group.
- ④ **Final Plan** – The team has prepared numerous plans for clients, in various formats. In their work at the NCSL, they regularly produced reports that were distributed to legislative bodies for use. Often, they are asked to write a final report, as well as produce content for reports that can be condensed for public brochures or highlighted in web content. They will be flexible, taking the committee's direction on what the final product(s) should look like.

### 3. Public Outreach

- ④ **Public Relations** – Gene is a former journalist, former director of communications for both the Missouri House of Representatives and the Denver-based National Conference of State Legislatures. He understands how the media works and knows how to contact reporters, write and distribute news releases, and develop message and talking points. He served as a spokesperson for NCSL, appearing on numerous interview programs, and he wrote op-eds that appeared in *The New York Times*, *Philadelphia Inquirer*, *Denver Post* and other publications. His colleagues from around the country elected him to serve a two-year term as president of the National Association of Government Communicators.
- ④ **Planning Group Website** – Gene has managed web pages for NCSL, the America's WETLAND Foundation, and for his own company, At Last Communications. He's advised organizations, including the State Legislative Leaders Foundation, on redesigning their websites.
- ④ **External Distributions** – Launching reports, using traditional, social media and electronic resources, are tasks Gene has excelled at for more than 30 years. He knows how to orchestrate a campaign using available (and free) tools to make sure reports or communications hit the highest number of people.
- ④ **Public Comment** – When working for the Missouri House of Representatives, Gene was responsible for coordinating public comment, particularly on events held by the Speaker of the House. He's advised several clients on how to hold public gatherings and provide strategies to ensure voices were heard but not disruptive to events.





## C. Project Management and Coordination

The Planning Group's work must be completed by November 2016, which is an ambitious, but achievable, timeline to produce a final report. This requires the management team to set and meet deadlines, keep activities on track and make sure the status of the project is clear to everyone.

We believe in the power of transparency, and thus will set up various mechanisms so that the Planning Group, the chair and all stakeholders always have the information they need to keep the process moving forward. This high level of transparency, combined with our flexible and adaptable approach to project management, are the hallmarks to ensuring an adherence to budgets and deadlines. We employ a feedback process that establishes goals and benchmarks early on and then participate in ongoing dialogue and analysis that keeps the project on time and within budget. Simply put, we will be on budget and on time.

The team will provide the planning group some options and tools regarding project management and coordination. Our project team has experience in a suite of software and tools to support this project and will work closely with the Planning Group to accommodate all of their storage, management and virtual meeting needs. In the past, we have utilized Basecamp and Evernote software to show exactly what the management team has on its plates, as well as the deadlines it is working under. The Planning Group may also be interested in an online dashboard, where they can see the progress of its work in graphic form.

It will be important to utilize a tool that can be accessed by the multiple partners across the state, which can be used both to coordinate activities and to provide a level of ease for even the most unpracticed user. Working with the virtual project management platform Basecamp, Gene and Amber will provide a user-friendly and transparent system that allows for virtual connection, while also providing ongoing tracking of progress toward deliverables within the project. Amber has a background in training partners on the use of new digital tools and can work with all the planning committee members to get them up to speed with Basecamp and other project management tools.



## D. Experience and Expertise

In response to the specific information sought in the solicitation, here are just some examples that demonstrate the depth and breath our team will bring to this planning process.

### Working with a task force or similar

As the head of the Coalition for Girls, Amber was responsible for coordinating and providing oversight to all of the Metro Denver Coalition committees, as well as to the community-level satellite coalitions that grew around the state. More recently, she has worked extensively serving on several advisory committees in the early childhood arena. She currently provides counsel to and serves as a member on the Denver County SEED (Social Emotional Early Development) Leadership Team. She also recently completed a project with the New Teacher Program of Denver Public Schools, where she created, recruited, and helped to staff a program advisory committee composed of teachers, district representatives and school administrators and leaders. Prior to directing the Colorado Coalition for Girls, Amber provided staffing for the Colorado Commission for High School Improvement with the Colorado Children's Campaign, and staffed several state legislative task forces with the National Conference of State Legislatures.

Gene has been very involved in working with several task forces and special committees during his tenure with the Missouri House of Representatives and the bipartisan National Conference of State Legislatures. Most recently, he worked with special task forces created by the America's WETLAND Foundation, which held two separate slates of meetings. The first targeted sustainable energy efforts along the Gulf Coast, where leadership forums were held in 11 communities from Florida to Texas. That effort resulted in a report, "Beyond Unintended Consequences: Adaptation for Gulf Coast Resiliency and Sustainability." The second, called the "Big River Works," concentrated on the Mississippi River and held six meetings along the river from Minnesota to Louisiana, as well as Washington, D.C.



### Managing and communicating with a variety of stakeholders

Creating processes that allows the voices of stakeholders to be heard is essential in the success of any outreach effort. Gene certainly has learned this based on several initiatives taken on by the Missouri House of Representatives and the NCSL. He has been trained on facilitation techniques and, as a former journalist and communications professional, he knows where to seek out opportunities for input.

A project with Texas A&M University serves as an example of a system he designed to work with several stakeholders to create a strategic plan for adult basic education in the state of Texas. Meetings were held with an appointed strategic planning team to identify issues and areas of concern. Gene and a colleague then conducted phone interviews with users advocates, and employees from across the state; spent several days watching class operations in three major Texas cities; and interviewed users on-site, holding meetings at community colleges and other locations to allow teachers and site administrators to voice their concerns about processes being used. The resulting plan was used as guidance overseeing those services as they were transferred to a new state agency.

Amber has committed her consulting practice and her participation in many of her projects to promoting collaborations and partnerships that already exist. Managing the Kid Connects State Technical Assistant Initiative, Amber convened local stakeholders from government, nonprofit and county agencies in three Colorado communities. She spent time with individual stakeholders in each community to help craft goals that addressed their system need by getting to know the individual stakeholders, surveying the community, and then working directly with the stakeholders to come up with tailored approaches to technical assistance based on individual community needs.

### Developing actionable plans

In addition to the above example of Texas adult basic education, in the past year Gene has created comprehensive strategic communication plans for the national Commission on Adult Basic Education and the Women's Legislative Network of the National



Conference of State Legislatures, as well as a communications plan for the Eisenhower Presidential Library and Museum.

At Last Communications prides itself in being adaptable to every organization's needs. In the three examples listed above, each client had a separate, major issue to address. For the Commission on Adult Basic Education, they had recently adopted a new membership system that saw their membership increase from about 3,000 to 13,000 in a single year. Developing an actionable plan to meet the needs of all those new members was critical. For the Women's Legislative Network, the organization found it was becoming harder to engage members, and other groups with similar missions were aggressively stepping up their outreach. The model that had worked for the organization about 20 years ago was no longer appropriate, and the Network needed an actionable plan to become more relevant in this space. Similar to the Women's Legislative Network, the Eisenhower Presidential Library and Museum knew it needed to make several changes to appeal to younger generations and ensure that they learn and know about the work of the president and general. In response, they are proactively launching a rare capital campaign to refresh the library and museum—an action that will shut down the two buildings for an entire year. Gene worked directly with senior staff to create a communications plan that is serving as a pathway to continued communications during the shutdown, and will guide the marketing and successful relaunch of the improved Presidential Library, ensuring its relevancy and engendering it to younger generations for their enjoyment.

#### Working independently yet collaboratively with partners

Our approach to working with partners is to immediately begin building relationships and establishing a level of trust. In nearly every client example mentioned in this document, we have worked with groups who want to assist in policy development, who need support donating funds, who will implement the action plan, or who have had to answer to umbrella organizations. We see our role as consultants to lay out a transparent process, communicate at appropriate times to stakeholders and partners, and establish ourselves as managers — and not dictators — of the process. This collaborative approach has served us well in our work.



Both Amber and Gene specialize in serving nonprofits, government agencies and public institutions. We've have chosen this field because we enjoy using our skill sets and expertise to assist those who are trying to make a positive change in the lives of people who need that help. We are always aware that there are people who want to influence the process. One challenge is to take the best of what those groups have to offer and help to incorporate that into the work. The other challenge is to make sure they don't unjustly influence the process. We have learned where that fine line is, and we know how to walk it.

With this project, the Planning Group has several state agencies, a growing constituency and a long list of people and organizations who will want to attach themselves to the effort. Based on our body of work, we have established a track record of working independently and collaboratively.

#### Working on issues related to the work of the Planning Group

In his work for the NCSL and for the Missouri House of Representatives, Gene coordinated public relations work with several task forces that touched a variety of issues, including issues relating to senior citizens. He understands how to generate publicity for special groups, whether it's publicizing its work, or recruiting the general public or special stakeholders to engage in the process.

Trained in research methodology, Amber specializes in public policy analysis that is informed by data analysis. She works with partners to build and improve systems and service delivery using data and policy analysis and implementation science principles. Systems building, whether it is in a simple system like a school-based health center or a complex system like early childhood or aging populations, must pull its partners from all stakeholders, crossing sectors and disciplines, in order truly effect change.

Amber has produced several important reports focused on systems building and collaboration, including her most recent report to the Denver County SEED (Social Emotional Early Development) Leadership Team. To complete this report she designed and conducted a survey, performed informant interviews and provided analysis on the data collected to create recommendations that are informing their community



application for the state LAUNCH Together initiative. In 2013, Amber was responsible for developing metrics for measuring and evaluating community collaboration for a statewide collective impact initiative focused on poverty reduction programs. Her report—*Changing the Landscape: An Evaluation of Poverty Reduction Efforts in Colorado*—was presented to the Colorado State Legislature in July, 2013.

### **Biography: Gene Rose, President, At Last Communications**

Gene Rose, the founder of At Last Communications, is an award-winning advocacy campaign strategist, video producer, speechwriter and journalist. He created the national strategic communications firm to provide needed services for North American nonprofits, associations, foundations, governments and athletic entities. He is a skilled facilitator with a specialty in getting groups to reach consensus and setting achievable and accountable goals.

Prior to creating his firm, he served as director of communications for the National Conference of State Legislatures (NCSL). There he launched the organization's entry into social media, provided media relations training to legislators and staff across the country, and was responsible for the organization's annual meeting, an event that annually drew up to 9,000 attendees. He wrote communication plans and earned media in *The New York Times*, NPR, *USA Today*, CNN, *The Wall Street Journal*, the *Chicago Tribune*, *Los Angeles Times* and other national, regional and state media.

His colleagues across the country elected him president of the National Association of Government Communicators, where he directed the strategic-planning process, wrote new position descriptions for officers, produced a report on government communicators pay and benefits, and laid the foundation for social media outreach. As communications director for the Missouri House of Representatives, Gene advised Speakers of the House on media strategies, coordinated media tours of the state and worked closely with the Capitol press corps.

He has been recognized for his writing, video and speech writing skills with awards from the National Newspaper Association, the Missouri Press Association, the National



Association of Government Communicators and the Telly Awards.

### **Biography: Amber Minogue, MA**

Amber is dedicated to advancing social justice, education and community development through allied engagement. She is a skilled researcher on public policy issues ranging from P-20 education and health and human services, to workforce development, economic self-sufficiency and other social policies. She has a diverse background working in public policy and nonprofit settings, with a focus on building community collaborations and coalitions. Her experience has given her a critical understanding of successful strategies within public policy and government that address the intersections of race, gender, social class and culture in order to effect change within the broader community context.

Building on a background working in community development and then running a start-up nonprofit, her consulting practice seeks to help build capacity for organizations to achieve their missions and grow their organization. She achieves this goal by partnering with her clients to perform strategic project management, conduct research and evaluation, and provide policy analysis and consultation. Recognizing that the strength of collaboration lies with how partners build together what any one organization could not build alone, she seeks to work with stakeholders from across sectors to achieve the common goals and outcomes for successful project completion.

Her community development and project management expertise has led to a series of accomplishments, most recently with the creation of Early Childhood Social Emotion and Mental Health Navigation Guide, a virtual community assessment tool designed to support collaborative decision-making in local community settings. Her leadership on this and other projects in the early childhood arena includes serving on the State Early Childhood Mental Health Consultation Infrastructure Committee, the NICU Consortium Executive Committee, and the Denver Early Childhood Council SEED Leadership Team. She also volunteers her expertise serving on the Early Childhood Committee for the New Legacy Charter School, a start-up school in Aurora for pregnant and parenting teens and their young children.



## E. Budget

While the proposal has some guidelines on expected hours and tasks, our experience in working with groups tells us that there will be unexpected developments that will cause adjustments to be made in expectations of the management team. In many cases, more meetings are held than are expected, and political and public influences can often create changes in the scope of work.



The solicitation asks for hourly rates, but we believe the state is best served by paying a retainer rate that will result in a lower hourly rate for the contractors.

Our budget proposal provides a guaranteed average of 80 hours per month at a billable blended rate of \$90, from November 1, 2015, through December 1, 2016, for a total cost of \$7,200 per month. For any work done in October 2015 and/or December 2016, the state will be billed an actual hourly rate of \$90, not to exceed \$6,400.

Our team agrees that the state will not be charged in the November 1 through December 1 time period for any hours the management team works beyond 80 hours. While we fully expect that this is likely to occur in each month, our interest in the project is such that we are willing and pleased to do what it takes to make the project successful.




The offer also includes any time that will be needed to produce reports, including basic general design. The offer does not include printing costs. The proposal assumes the state will provide meeting space facilities and reimburse any required expenses.

### Agreement

-  At Last Communications will perform all tasks required by the statute, solicitation and directions from the Chair.
-  At Last Communications will guarantee 80 hours of work from November 1, 2015 through December 1, 2015 at a rate of \$7,200 per month, for a total contract cost of \$93,600. The state will not be charged for hours beyond the project, though they are expected each month.





-  If At Last Communications' services are required in October of 2015 and/or December 2016, the state will be charged \$90 per hour, not to exceed a total cost of \$6,400. This would make the maximum contract bid \$100,000 if that amount is reached.
-  At Last Communications will be reimbursed for any hard costs as directed by the Planning Group.
-  At Last Communications will bill the state in accordance to contract guidelines.



## F. References

**Early Childhood Mental Health Director  
Founder and Director of Kid Connects  
Colorado Office of Early Childhood  
Department of Human Services  
Jordana Ash, LCSW  
[jordana.ash@state.co.us](mailto:jordana.ash@state.co.us)  
(720) 350-0777**



*Responsibilities: systems building; project management; cross-sector collaboration; state and local community development; technical assistance; strategic planning; data analysis; report writing.*

Minogue Consulting was hired as the Project Manager for the *Kid Connects Community Training and Technical Assistance Project*, a project designed to build knowledge and capacity regionally for early childhood mental health consultation that in turn, would increase the use and consistency of effective consultation strategies across Colorado and create sustainable community practices that would promote and support the mental health consultation system in each community. Kid Connects—an evidence-informed approach which provides integrated health and mental health consultation to licensed child care centers, family child care homes and in Head Start/Early Head Start settings—served as the mechanism for developing provider capacity while partner analysis was employed to help build community capacity.

Each regional TA included participation by a variety of stakeholders who both provide mental health services to children at the early childhood level, and who help build a system of support for service delivery at the community level. Collecting data from each community, Amber analyzed community data, performed partner analysis and solicited community collaborative input in order to design and conduct localized community-level technical assistance plans for each of the three communities. This year long capacity building effort required Amber to balance project timelines in order to achieve project deliverables while supporting needs of individual communities in expanding systems infrastructure of early childhood social-emotional and mental health



initiatives. Focusing on local relationships, she included stakeholders from across public and private sectors, representing early childhood health, mental health, child care, child welfare and business, in order to ensure a cohesive approach to systems infrastructure development and individual professional development.

### **JFK Partners**

**University of Colorado**

**Sarah Davidon, Director of Policy  
and Community Education**

**[sarah.davidon@ucdenver.edu](mailto:sarah.davidon@ucdenver.edu)**

**303.724.7635**



*Responsibilities: Project management; resource development; cross-sector stakeholder collaboration, indicator development; process evaluation; report writing; systems building; community assessment.*

Over Colorado has successfully developed a number of resources, programs and initiatives that address the needs of providers of care, parents and children related to children's social-emotional development and mental health (SE/MH). To help increase access to resources and information and to compile information in a uniform and assessable fashion, JFK Partners hired Minogue Consulting to manage the design and development of the Early Childhood Social-Emotional and Mental Health Navigation Guide—an early childhood web-based tool to aid communities in decision making processes for needs assessment and program development about early childhood social-emotional and mental health programming at the community level.

Working with JFK Partners, Amber convened state-level stakeholders to develop indicators that assessed capacity and quality of social-emotional initiatives that could then be used to improve local level delivery of social-emotional programming in early childhood. Leading a process of information gathering, data was collected on community needs, goal and priorities, and then a mapping and analysis of state and local initiatives was performed along with an identification of gaps and barriers to services in local communities. Data collected was then culled and used to develop the navigation guide. Once the tool was developed, Amber worked with Sarah Davidon,



project principal, to disseminate information and training on usage of the virtual tool. Data analysis and project lessons learned were also used in final policy recommendations on policy, practice and funding strategies that could best support community need in Colorado.

### **Commission on Adult Basic Education**

**Sharon Bonney, COABE Manager**

**888-442-6223**

**[sharonbonney@coabe.org](mailto:sharonbonney@coabe.org)**



*Responsibilities: Project management; strategic planning; facilitation; report writing; data analysis; national membership survey; stakeholder analysis; focus groups; interviews; environmental scan of related reports and industry trends.*

COABE serves more than 13,000 members to provide adult basic education services, primarily to those who need to raise their reading, writing and comprehensive skills to obtain jobs and provide for their families. The group serves as the leading voice on adult basic education issues, holds an annual meeting, and provides professional development for teachers, administrators and others that work in the industry.

At Last Communications was hired to produce a strategic plan for the Commission. The firm produced, distributed and analyzed a national survey, interviewed key stakeholders, and conducted facilitation exercises with the organization's officers and stakeholders to create a plan that contained short- and long-term goals, objectives and strategies. Even though the plan has only been in place since April, the organization has already taken significant steps by hiring its first executive director and taken other actions to implement the plan.



**Women's Legislative Network**  
**Katie Ziegler, Program Manager**  
**303-856-1514**  
**[katie.ziegler@ncsl.org](mailto:katie.ziegler@ncsl.org)**



*Responsibilities: Project management; strategic planning; facilitation; report writing; data analysis; national membership survey; stakeholder analysis; focus groups; interviews; environmental scan of related reports and industry trends.*

The Women's Legislative Network is the professional development organization that includes every female state legislator in the 50 states, United States territories, and the District of Columbia. The mission of the Women's Legislative Network is to promote the participation, empowerment, and leadership of women legislators. The Network also sponsors skill-building workshops, and hosts meetings to allow women legislators to interact and learn from each other.

With the Network's 30th anniversary scheduled to take place in Seattle in August of 2015, At Last Communications was asked to produce a strategic plan for the organization, which included surveys, focus groups and facilitated conversations that informed the creation of a blueprint to guide its future growth. The report provides recommendations and strategies focused on membership and benefits, communications, meetings, and ways to promote the 30th anniversary celebration.



## G. Conflict of Interest

Gene Rose's wife works for Christian Living Communities, a local not-for-profit senior living organization in the Denver metro area. The group does not accept any state funds, but senior living likely will be a topic of discussion for the Planning Group. He will ensure there will be no conflict of interest in working on these issues.



# NEW PATHWAYS

COABE STRATEGIC PLAN



*Inspiring educators so adults succeed  
and communities thrive*





# NEW ERA: WORKING WITH WIOA

CAREER PATHWAYS SUPPORTING TRANSITIONS FROM  
EDUCATION INTO WORKFORCE



## OUR MISSION

To inspire educators so adults succeed  
and communities thrive.

## OUR GOALS

- Be a strong, dynamic voice for adult education
  - Elevate the profession of adult education
- Facilitate the ongoing development of adult education leaders and organizations
- Evaluate COABE's structure to improve member services



# GOAL #1

*Be a strong, dynamic voice for adult education*

## RAISE AWARENESS AND UNDERSTANDING OF ADULT EDUCATION AND ITS IMPACT

- Establish a PR / Communications Committee
- Create a communications toolkit/plan
  - Include consistent messaging, compelling data and stories, and content/collateral
  - Include student voice, articles, video, etc.
  - Include third-party endorsers and cross-promote COABE via like-minded organizations' channels and publications
- Develop metrics to guide a campaign and effective delivery methods
- Create a media strategy and cultivate relationships
- Identify and reach new target audiences via social media, leveraging existing research
- Explore fundraising / sponsor opportunities for a broader marketing campaign

## DEVELOP AND MAINTAIN RELATIONSHIPS THAT HELP TO PROMOTE THE VALUE AND DIVERSITY OF ADULT EDUCATION

- Identify a list of potential partners
- Develop a matrix of opportunities, goals and priorities related to potential partners
- Encourage COABE representatives to reach related audiences
- Encourage representatives from related organizations to participate in COABE events
- Expand COABE's network of affiliates (e.g., business and government associations, focusing on connections related to adult education's impact)

## ADVOCATE FOR ADULT EDUCATION PRIORITIES WITHIN POLICY DISCUSSIONS

- Spearhead high-level communications with congress and the administration
- Maintain policy awareness to inform and interpret for the adult education field
- Communicate opportunities and value of COABE involvement
- Develop grassroots advocacy training network and tools, focusing on in-person mentoring

# GOAL #2

## *Elevate the profession of adult education*

### DEVELOP CAREER ADVANCEMENT OPPORTUNITIES AND TRACKS FOR ADULT EDUCATION PROFESSIONALS

- Conduct an environmental scan of career advancement tracks in related fields
- Develop and advance standards to provide practitioners better pay opportunities, benefits, tools and access to professional development
- Explore development of a national credential
- Seek leadership partnership opportunities

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### PROVIDE COMPREHENSIVE PROFESSIONAL DEVELOPMENT OPPORTUNITIES FOR ADULT EDUCATION STAKEHOLDERS

- Explore professional development gaps and determine effective methods to bridge those gaps
- Create a COABE community of practice that gathers research, data, analysis and professional development opportunities
- Explore development of a national credential
- Continue to host the nation's premier conference on adult education and explore additional member meeting opportunities

### ELEVATE THE ROLE OF RESEARCH, DATA AND ANALYSIS IN ADULT EDUCATION

- Prioritize and incentivize adult education research topics
- Analyze data and topics so COABE becomes an educated consumer of research
- Provide practitioners with methods to translate research to practice
- Market the organization's Research Agenda and Journal
- Create an indexed, socially reviewed repository for practitioner-based research

# GOAL #3

*Facilitate the ongoing development of adult education leaders and organizations*

## STRENGTHEN DIVERSE INVOLVEMENT WITHIN COABE

- Work with regional representatives to identify and encourage new leaders to disseminate COABE opportunities
- Better articulate COABE roles and needs, including committee memberships, task forces, etc.
- Explore broader networks for ancillary leaders and/or members (e.g. invite a member of the business community to join the board)

## FACILITATE THE EXCHANGE OF IDEAS AND BEST PRACTICES AMONG STATES

- Continue to expand national and regional conference opportunities for leader-to-leader interactions
- Expand virtual opportunities for interaction, including web workshops, teleconferences, online forums, mentor/buddy networks, etc.

## PROVIDE ORGANIZATIONAL AND TECHNICAL ASSISTANCE TO STATES

- Develop COABE liaisons / representatives in each state
  - Articulate benefits/roles
  - Assign state representatives to their regional representative
  - Focus on this network to create a pipeline for leadership
- Develop a matrix of state needs, strengths and phases of organizational development

# GOAL #4

## *Evaluate COABE's structure to improve member services*

### ADJUST ORGANIZATIONAL STRUCTURE AND OPERATIONS MODEL

- Thoroughly review and revise vis-à-vis mission and goals
- Create an organizational chart
- Outline board member duties and responsibilities
- Review other association organizational models
- Review the elections process to ensure transparency for members
- Identify a funding source to revamp structure and increase capacity

### DEVELOP DIVERSE AND SUSTAINABLE FUNDING STREAMS

- Seek large and sustainable grant opportunities
- Identify and attract corporate supporters

- Set operating budget targets through 2020
- Partner with vendors to create royalty products
- Develop a cadre of COABE-endorsed speakers by area of expertise (possibly a large group member benefit)
- Create online donation opportunities
- Explore offering fee-for-service professional development opportunities, products, technologies and other member add-ons

### ACTIVELY ENGAGE, RECRUIT AND RETAIN MEMBERS

- Review membership levels
- Develop a more ethnically diverse leadership group
- Communicate opportunities and value of COABE involvement
- Articulate and communicate COABE membership benefits
- Leverage partnerships to promote membership
- Review & revise website
- Develop feedback mechanisms to better understand member attitudes toward COABE products and services
- Survey COABE membership annually
- Create badges and other profession-related items for members (e.g. business cards)

### DETERMINE AND REVISE COABE'S BRAND

COABE's strategic planning process  
has been generously underwritten  
with support provided in part by  
McGraw Hill Education



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# TEXAS ADULT BASIC EDUCATION

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Strategic Plan  
2013-2018



## MISSION STATEMENT

Deliver educational opportunities for underprepared adults that lead to career pathways and a more prosperous Texas for generations to come.

## GOAL STATEMENT

Increase the number of Texans prepared to enter the workforce or post-secondary education and earn family sustaining wages.

## OBJECTIVES

- ★ Set clear definitions for success by expanding data collection, analyzing trends, and identifying policy decisions that support ABE's mission and raise awareness of its broader impacts.
- ★ Develop and support funding & investment strategies that lead to long-term ABE sustainability and success.
- ★ Meet demand by achieving excellent client services that motivate learners through innovative program design, and by providing research- or evidence-based professional development to qualified staff and volunteers.
- ★ Form networks and partnerships that further ABE's goals and related Texas priorities.
- ★ Implement and support marketing, branding and advocacy initiatives that raise public awareness of ABE's mission, the population it serves, and the return on investment benefitting the state of Texas.

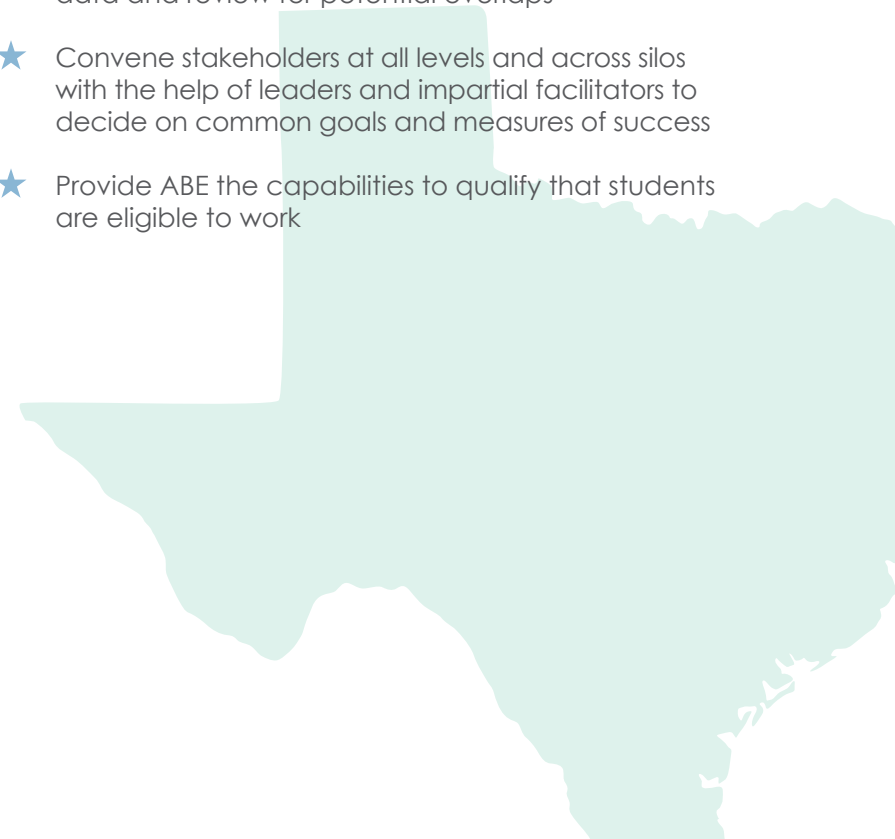
## STRATEGIES & TACTICS

### Objective 1

Set clear definitions for success by expanding data collection, analyzing trends, and identifying policy decisions that support ABE's mission and raise awareness of its broader impacts

#### DEVELOP RELATIONSHIPS WITH POLICYMAKERS AND THE BUSINESS COMMUNITY TO IDENTIFY SUCCESSFUL OUTCOMES AND DEFINE AREAS OF NEED

- ★ Work with policymakers and administrators to establish goals and funding to meet targeted outcomes
- ★ Identify stakeholders who need employees, collect data and review for potential overlaps
- ★ Convene stakeholders at all levels and across silos with the help of leaders and impartial facilitators to decide on common goals and measures of success
- ★ Provide ABE the capabilities to qualify that students are eligible to work



## **PRIORITIZE GOALS AND ALIGN POLICY EXPECTATIONS - THROUGH THE USE OF DATA COLLECTION AT ALL LEVELS - TO OUTLINE A CLEAR AND LOGICAL DIRECTIVE THAT DEFINES SERVICE AND SUCCESS**

- ★ Determine the cost of a successful student outcome, rather than calculating the cost per student
- ★ Set goals based on increasing meaningful outcomes, rather than the number of students served
- ★ Ascertain data criteria needed to identify trends and assure long-term performance
- ★ Establish measurable business goals, such as the rate of transition in the continuing education program, by certificate or degree
- ★ Map pathways for students, driven by workforce needs
- ★ Define what it means to be “prepared” for entry into the ABE system and enrolling students likely to achieve an outcome
- ★ Meet and exceed state and federal reporting requirements, understanding that “most in need” federal definition may be at odds with “outcomes”

## **EXPLORE THE CREATION OF A DATA SYSTEM THAT ALLOWS FOR ACCURATE SHARING ACROSS KEY AGENCIES**

- ★ Anticipate the needs and requests for data reporting from internal and external forces
- ★ Identify the databases/data points that all agencies need from each other and make them available for sharing
- ★ Identify and address the barriers to data sharing (TEAMS, TWIST, THECB, TOLD)
- ★ Determine resources needed to create shared data system
- ★ Keep confidentiality issues at the forefront for identity protection and FERPA compliance, creating systems that allow for measurable tracking



## **CONTINUE TO USE, MAINTAIN AND ENHANCE TEAMS STATEWIDE DATA MANAGEMENT SYSTEM FOR ADULT LEARNERS**

- ★ Review and analyze all current reports and systems, using data to recommend program improvements
- ★ Structure metrics to weigh needs vs. outcomes
- ★ Create short- and long-term reports for program and classroom improvement
- ★ Maintain and promote TEAMS users listserv
- ★ Revamp TEAMS training at all levels, considering on-demand training opportunities
- ★ Continue technical workgroups to improve data integrity, collection and analysis
- ★ Elevate the data analysis skills and training of GREAT Center staff and local program staff



## Objective 2

Develop and support funding & investment strategies that lead to long-term ABE sustainability and success

### DEVELOP A 10-YEAR STATE FUNDING PLAN

- ★ Develop a comprehensive state funding target with milestones for implementation, formulated by a credible authority with input from business, government and grassroots organizations
- ★ Ensure a dedicated statutory funding source such as a state funding formula or a percentage of the permanent school fund
- ★ Explore additional funding sources, including those that could fund those not covered by the federal Adult Education and Family Literacy Act

### INVENTORY RESOURCES AVAILABLE AT REGIONAL AND LOCAL LEVEL TO IDENTIFY BENEFICIAL BUDGETARY OPPORTUNITIES

- ★ Identify essential elements of the system and conduct a gap analysis vis-à-vis common definitions of success
- ★ Assess the system's components by taking an inventory of existing capabilities, purview and best practices
- ★ Create a map/flowchart of the landscape, including funding sources and their destinations
- ★ Integrate related efforts physically, i.e. people and facilities
- ★ Achieve local input and buy-in by convening a dialogue, perhaps regionally, through leaders and existing structures that is facilitated by impartial parties
- ★ Work with employers and workforce partners to establish business on-site classes
- ★ Open and maintain a dialogue w/the K-12 system



## Objective 3

Meet demand by achieving excellent client services that motivate learners through innovative program design, and by providing research- or evidence-based professional development to qualified staff and volunteers.

### INCREASE THE MENU OF OPPORTUNITIES FOR STUDENTS ENTERING AND PROGRESSING THROUGH THE SYSTEM, BETTER MATCHING CLIENT REALITY

- ★ Continue to expand and develop expertise in career pathways, such as transition classes, integrating career awareness and goal setting (to improve motivation and orientation), curricula contextualization, counseling to careers and transition specialists
- ★ Set goals for transition and provide greater awareness of services
- ★ Continue to expand and develop instructional expertise for special learning needs
- ★ Provide flexible delivery options, including distance learning
- ★ Facilitate community partnerships to provide access to childcare support
- ★ Revisit, evaluate and implement content standards revisions recommended by Technical Work Group

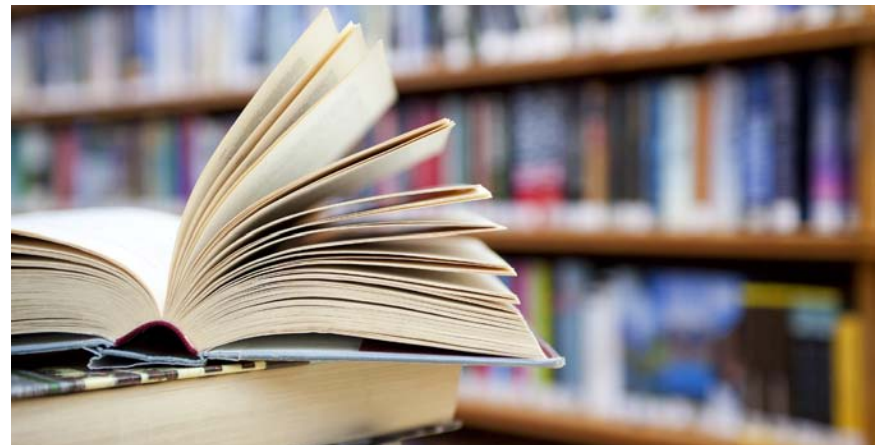
### INTEGRATE UP-TO-DATE TECHNOLOGY ACROSS ALL CURRICULUM AND PROGRAM MANAGEMENT

- ★ Determine methods to expand delivery of online and distant learning in an affordable and usable manner
- ★ Make access to technology a requirement of the RFP process
- ★ Explore partnerships to provide technology and make it more accessible for teachers and students

- ★ Create opportunities for teachers and students to acquire computer skills, particularly as it relates to the 2014 GED® test
- ★ Explore incorporating the use of smartphones, tablets, and laptops as a tool in the education process
- ★ Develop partnerships with libraries

### CREATE OPPORTUNITIES FOR INSTRUCTORS, STAFF AND ADMINISTRATORS TO DEVELOP/IMPROVE SKILL SETS

- ★ Consider the creation of a statewide professional development plan
- ★ Work with local and regional program leadership to strengthen their ability to support and oversee the application of professional development in practice
- ★ Promote administrative and teacher participation in credentialing and in the Leadership Excellence Academy
- ★ Establish an on-line training portal to provide additional professional development opportunities
- ★ Create time and personnel for counseling services
- ★ Improve communications to build awareness of professional development opportunities
- ★ Publicize resources and support services available from TCALL





#### RECRUIT AND RETAIN HIGH-QUALITY AND MOTIVATED STAFF AND ADMINISTRATORS

- ★ Develop sample/template staff job descriptions
- ★ Raise awareness of opportunities for qualified teachers
- ★ Provide wage system benchmarking information and identify additional resources
- ★ Create an inviting and supportive environment for staff that encourages feedback and interaction
- ★ Prioritize providing teachers with more tangible classroom resources and paid time for professional development and class preparation
- ★ Create career counseling “events” for teachers to share professional development experiences

#### Objective 4

Form networks and partnerships that further ABE’s goals and related Texas priorities

#### ACHIEVE TEXAS WORKFORCE INVESTMENT COUNCIL ADOPTION AND TRI-AGENCY COLLABORATION

- ★ Engage in a statewide campaign to promote need for and availability of services to involve state leadership to facilitate more integration at the local and regional levels
- ★ Develop the case for cooperation and specific needs of agencies and individuals
- ★ Identify and cultivate champions to support a new framework and facilitate connections, including business, NGOs, industry leaders and others
- ★ Build a core network of key legislative aides and staff, including the legislative budget board, finding where state agencies are dependent upon each other to meet their mission or performance target
- ★ Take inventory of stakeholders who need to be at the table
- ★ Encourage development of a routine working relationship among Tri-Agency partners to strengthen and accelerate collaboration

#### DEVELOP A PROCESS TO BETTER IDENTIFY AND FOSTER PARTNERSHIPS WITH VOLUNTEERS AND VOLUNTEER ORGANIZATIONS

- ★ Communicate with statewide, regional and local volunteer leaders to identify appropriate organizations
- ★ Include volunteer organization representative(s) on ABE Advisory Board

- ★ Continue to provide community based organizations access to listservs, conferences, and other networking opportunities
- ★ Expand and develop training for volunteers
- ★ Intensify participation in Literacy Volunteer Training Initiative to build instructional capacity for volunteers

#### ENGAGE THE BUSINESS COMMUNITY IN DISCUSSIONS OF PROGRAMS AND BENEFITS

- ★ Explain costs to state and taxpayers of uneducated citizens and the benefits of a better educated workforce
- ★ Demonstrate solutions by setting up site visits for employers to see how business benefits from ABE programs
- ★ Identify business leaders to champion ABE issues, form a coalition and promote common goals
- ★ Incorporate feedback from the business community
- ★ Reach out to chambers of commerce

#### FORMALIZE THE RELATIONSHIP BETWEEN COMMUNITY BASED ORGANIZATIONS AND ABE

- ★ Identify key leadership
- ★ Make the case and market it
- ★ Achieve provider-level buy-in and support among peers

## Objective 5

Implement and support marketing, branding and advocacy initiatives that raise public awareness of ABE's mission, the population it serves, and the return on investment benefitting the state of Texas

#### INCREASE AWARENESS AMONG POLICYMAKERS OF PROGRAM SUCCESSES AND RESULTING COMMUNITY AND STATEWIDE BENEFITS

- ★ Develop programs involving key policymakers to connect to students, teachers and administrators
- ★ Create educational/promotional materials targeted for distribution to leaders and policymakers
- ★ Improve legislative district reports to include more useful and timely information
- ★ Design reports and other materials with media in mind
- ★ Assign responsibility/develop a capacity for media relations and monitoring

#### EXECUTE A BROAD BASED PROMOTIONAL CAMPAIGN TO REACH CLIENTS AND STAKEHOLDERS

- ★ Articulate the value proposition to business, individuals and society
- ★ Engage a strategic coalition of support, leadership and champions
- ★ Share success stories
- ★ Engage the grassroots
- ★ Reframe the debate/create a new narrative

$$\sqrt[3]{a^2 + \frac{3}{4}b^2} \cdot c^4$$



## **ESTABLISH A BRAND IDENTITY THAT CONVEYS THE MISSION AND BROAD BENEFITS OF ADULT EDUCATION**

- ★ Create a communications strategic plan
- ★ Adopt a logo, tagline and graphic identity
- ★ Take advantage of product placement opportunities
- ★ Analyze website's effectiveness vis-à-vis different audiences and improve or upgrade clarity and impact
- ★ Develop messaging and talking points
- ★ Tell stories and highlight students
- ★ Use social media creatively and effectively

## **ESTABLISH RELATIONSHIPS WITH COOPERATING ORGANIZATIONS AT STATE AND LOCAL LEVEL TO INCREASE PUBLIC AWARENESS OF ABE BENEFITS**

- ★ Identify potential cooperating organizations (all statewide and local stakeholders that have an interest in promoting and supporting adult education)
- ★ Develop an engagement plan and campaign

## **CREATE MARKETING VEHICLES TO BRING NEEDED PERSONNEL SUPPORT TO THE SYSTEM**

- ★ Increase the number of volunteers working in the system
- ★ Attract more teachers into the system



## Arriving at a Strategic Plan: An Inclusive, In-Depth Process

Adult education will be key to meeting increasingly high demand from employers and citizens who understand that a more educated work force is the key to real and lasting economic growth. In its participation with a federal effort to address key national adult basic education issues, Texas initiated a strategic planning process to build on its successes over the past decade.

Marmillion + Company, a national strategic communications firm, entered into a contract with Texas A&M University to facilitate a strategic planning process for the Texas adult education and family literacy system, in collaboration with Texas LEARNs and the Texas Center for the Advancement of Literacy and Learning. The firm conducted an environmental scan, identifying key national and state issues, and prepared a detailed, comprehensive report of its findings.

The firm then facilitated three, full-day, intensive planning sessions with the Texas Adult Education Strategic Planning Committee to identify goals, objectives and strategies for a strategic plan. Prior to these facilitation sessions, Marmillion & Company conducted more than one dozen interviews with key stakeholders and conducted a number of site visits to get a first-hand look at the diverse challenges and opportunities facing Adult Education students, teacher and support staff.

The resulting strategic plan reflects an analysis of the input received from all of the various parties involved in the planning process.

### TEXAS ADULT EDUCATION STRATEGIC PLANNING TEAM

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Nancy Dunlap, Adult Ed. South Central Region  
Jon Engel, Adult Ed. Central Region  
Olga Escamilla, Texas Association for Literacy and Adult Education (TALAE)  
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For more than 20 years, Marmillion + Company (MCo) has provided strategic planning, communications consulting, branding services and public awareness campaigns to a wide range of non-profits, governmental organizations and associations. MCo's past and present roster of nearly 100 clients includes: The U.S. Department of Education, University of California Los Angeles (UCLA), J. Paul Getty Trust, National Endowment for the Arts, National Conference of State Legislatures, The Nature Conservancy, National League of Cities, U.S. Conference of Mayors and many more. For more information, visit [www.marmillion.com](http://www.marmillion.com).

