



# Request for Proposals

## Strategic Planning – Board Annual Retreat 2024

### Background

The Metro Atlanta eXchange for Workforce Solutions (MAX) mission is to advance economic competitiveness in the Atlanta region by strengthening connections, collaborations, and practices among workforce developers and organizations engaged in workforce development.

The goals of MAX are to (1) improve alignment between workforce development service providers to better meet the needs of providers, employers, and job seekers, (2) increase awareness and visibility of workforce development system and opportunities, (3) provide opportunities to increase quality, capacity, and effectiveness of the region’s workforce system, and (4) serve as a sustainable, neutral, third party convener for workforce developers, employers, and organizations engaged in workforce development.

The purpose of MAX is to serve as a central convener and connector for individuals associated with any entity engaged in the Atlanta region’s workforce system (e.g., workforce development boards, government agencies, workforce development service providers, k-12 educational entities, institutions of higher learning, human services organizations, intermediaries, funders, and employers). MAX provides a neutral and consistent forum to exchange ideas and experiences on effective programs, processes, and procedures; to allow for discussion of effective solutions to common problems; to enable entities to learn best practices to inform continual improvement; and to foster partnerships among the entities. To carry out this purpose, MAX serves as a vehicle for interface with state, regional and national agencies, organizations, and associations that have impact on workforce development. MAX also serves as a primary communications channel for the aforementioned entities named in this paragraph to communicate to the workforce system as a whole.

### Purpose and Description of this RFP

Since inception in 2014, MAX has evolved from a small group of collaborators to a paid membership organization. In 2024, with a formal vote by the Board of Directors, MAX seeks to become a legal non-profit entity. With that in mind, the Board wishes to embark on a refresh and update of our strategic plan as we look to the future of the organization. The current strategic plan will be provided to finalists prior to a planning call.

This Request for Proposal is to engage a facilitator to lead pre-planning and group discussion activities that lead to the update of the MAX Strategic Plan by the Board of Directors at our Annual Retreat, in-person on June 26, 2024. The outcome will be a formal, written plan to be introduced to the full membership this calendar year.

Activity/Deliverable	Timeline
Last Date to Submit Applications	Monday, May 13, 2024, 8:00 am EST
Notification of Selection	May 20 <sup>th</sup> by 6:00 pm
Planning Meeting with MAX Board Chair	May 22 <sup>nd</sup> 2pm – 4pm or May 24 <sup>th</sup> 3pm to 5pm

Pre-planning Activity Sent to Board Members	By May 28 <sup>th</sup>
MAX Board Meeting via Zoom	June 18 <sup>th</sup> 11:30 am – 10-15 minutes
<p>Annual Retreat at Chateau Elan – facilitate in-person session with group activity and discussion for ~ 20 people.</p> <p>Tentative schedule:            10:00 am – 11:00: setup &amp; prep            11:00 am – Noon: guests arrive, Board chair welcome &amp; turn over to facilitator: working lunch            Noon – 1:00 pm: activity            1:00 – 2:00 pm: discussion            2:00 – 2:20: break            2:20 – 3:30: discussion            3:30 – 4:00: recap, summary, next steps            4:00 – 4:15: closing with Chair, adjourn, information re: dinner with Chair Emeritus            4:15 – 4:30: debrief and clean-up</p>	June 26 <sup>th</sup> 11:00 am to 4:30 pm
Written Summary of Strategic Plan Document: PDF and editable document (e.g., Word, etc.)	Delivered within 30 Days after Annual Retreat – July 27, 2024

## Requirements

MAX seeks proposals for facilitators for strategic planning pre-work, an in-person session, and associated follow up.

Onsite resources at event will include:

- A/V Technology (e.g., projector, internet, microphone, speakers.)
- Supplies to support facilitation (e.g., post-its, pens, poster paper, markers.)

Proposal may include mileage reimbursement at federal cost reimbursement rate to and from the venue, and either flat fee or hourly rate for facilitation of pre-work, two pre-planning meetings via video call, in-person full day facilitation, and delivered written summary. The hourly rate should include all prep work, as well as time spent with MAX board for a total cost proposal.

## Application Questions

1. Please briefly describe your experience with strategic plan facilitation (*limit 500 words*)
2. Please describe your approach to facilitation, your proposed group activity, and format for strategic planning session. (*limit 1,000 words*)
3. Please provide 3 references with contact information.

## Budget

Provide information on your price proposal.

Budget Category	Amount	General Notes
Mileage / Travel to and from Chateau Elan		
Facilitation Fee		
Other (please describe)		

## Submission Deadline and Instructions

Interested partners should **submit responses via email**. *Proposals will be accepted until Monday, May 13, 2024, 8:00 am EST.* Our goal is to make notifications of selection by 6:00 pm on May 20<sup>th</sup>.

For any additional questions about this RFP, contact:

1. Jenny Taylor, MAX Board Chair 2024-2025, [jtaylor@ging.org](mailto:jtaylor@ging.org); and
2. Joy Wilkins, MAX Facilitator, [joy@servingcommunities.net](mailto:joy@servingcommunities.net).

Submit proposals to Alicia Berry, [aberry@ging.org](mailto:aberry@ging.org), 678-213-3575.



## MAX AT-A-GLANCE

<https://metroatlantaexchange.org/>

### CURATED RESOURCES

#### BUILDING VISIBILITY AND KNOWLEDGE THROUGH INFORMATION BROKERAGE

- **MAX Mondays**: Weekly email updates on workforce happenings for 2,000+ list members.
- **MAX Website**: Access to WorkSource Metro Atlanta; a centralized calendar of events; reports, data tools, and more.
- **MAX Job Board + RFP Board**: Posting career and project opportunities to MAX website.
- **MAX Resource Library**: Central clearinghouse for reports and studies, data tools, websites and online portals, and other sources of information related to workforce development.

### PROFESSIONAL DEVELOPMENT

#### INCREASING QUALITY, CAPACITY, AND EFFECTIVENESS IN THE PROFESSION

- **MAX Academy**: Workshops to build knowledge and skills among workforce developers and connect them to helpful resources for serving job seekers and employers.
- **MAX Minutes**: Webinars to provide timely insights from key experts on workforce trends, opportunities, and hot topics.
- **MAX Talks**: Lunch-n-learns to hear from business and other employers about their perspectives on workforce needs and industry trends.

### CONNECTIONS

#### FOSTERING ALIGNMENT AND PARTNERSHIPS AS A NEUTRAL CONVENER

- **MAX Leadership Network**: Senior-level leaders in workforce who meet every other month to discuss key issues and opportunities of significant and mutual interest, and work through best practices.
- **MAX Provider Council**: Advisory council to inform the work of MAX and provide a platform for information sharing and collaboration among nonprofit and community-based organization workforce leaders.
- **MAX Data Council**: Advisory council to inform the work of MAX and provide a platform for information sharing and collaboration among workforce data experts and researchers.
- **MAX Member Engagement Council**: Advisory council to advise, review, and advocate for strategies and actions that contribute positively to the MAX member experience.
- **MAX Annual Meeting**: Signature event that brings all MAX members together.
- **Other Convenings**: Meetings that bring MAX members together for member value.

### AWARENESS

#### RAISING UNDERSTANDING ABOUT WHO IS DOING WHAT, WHERE, AND FOR WHOM

- **MAX Provider Portal**: One place to learn about the services of workforce providers, intermediaries, and other partners serving in the Atlanta region.
- **MAX Blog**: Articles posted to website and socialized in MAX Mondays.
- **MAX Member Portal**: One place to find and share information with fellow members.
- **MAX Member Spotlight**: Insights, impact, and trends from fellow members.



## **MAX PROSPECTUS**

[www.metroatlantaexchange.org](http://www.metroatlantaexchange.org)

### **ABOUT MAX**

The Metro Atlanta eXchange for Workforce Solutions (MAX) was launched in December 2014 by a team of regional leaders who recognized that increased collaboration across the Atlanta region’s workforce development arena empowers all stakeholders to positively influence each other’s efforts and realize greater collective impacts through stronger cohesiveness. MAX has since served as a convener and connector for the Atlanta region’s workforce development community, pulling together all the players across the broad workforce system together in one place and on a regular basis. Indeed, MAX has developed into a dynamic network to serve and connect workforce developers.

The MAX network includes more than 2,000 workforce developers representing service providers, educational entities, intermediaries, employers, and funders. MAX is a catalyst for empowering and aligning workforce development efforts to meet the needs that employers have for a ready workforce. In January 2021, MAX began an exciting transformation to become metro Atlanta’s premiere professional membership association for workforce developers. Today, MAX is nearly 400 members strong.

### **MISSION**

The mission of MAX is to advance economic competitiveness in the Atlanta region by strengthening connections, collaborations, and practices among workforce developers and organizations engaged in workforce development.

### **GOALS**

#### **ONE**

Improve alignment within the workforce ecosystem to better meet the needs of providers, employers, and jobseekers.

#### **TWO**

Increase awareness and visibility of workforce development system assets and opportunities.

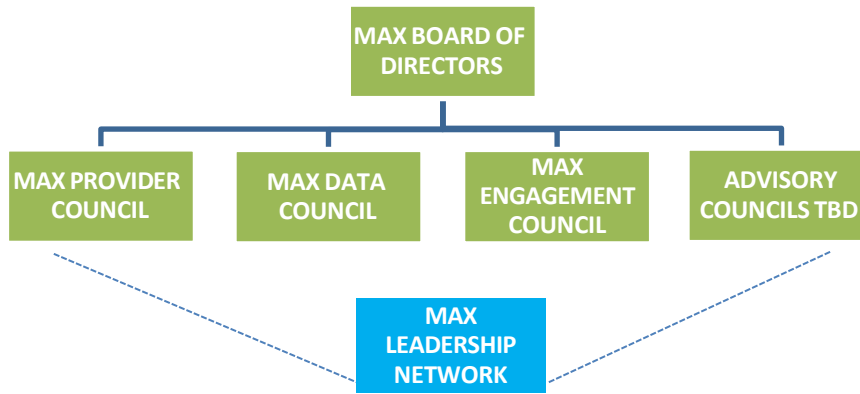
#### **THREE**

Provide opportunities to increase quality, capacity, and effectiveness of Atlanta’s workforce system.

#### **FOUR**

Serve as a sustainable, neutral, third-party convener for workforce developers, employers, and organizations engaged in workforce development.

## MAX ORGANIZATIONAL FRAMEWORK



## MAX LEADERSHIP NETWORK

The MAX Leadership Network is comprised of senior workforce leaders who convene regularly to strengthen our collective capacity as workforce developers to meet the needs that employers have for a ready workforce. The Leadership Network works to help network members: learn more about who is doing what, where, and for whom; explore common issues and opportunities, share ideas and best practices for building solutions; make new connections and catalyze partnerships; and keep each other updated and informed on ways we can help each other.

## MAX PROVIDER COUNCIL

The MAX Provider Council is an advisory council – comprised of nonprofit and community-based organization workforce leaders – that works to help align MAX strategies and actions with the needs and operations of workforce service providers. The Provider Council’s work is essential in helping MAX achieve its mission of strengthening connections, collaborations, and practices among workforce developers. The council also provides a platform for information sharing and collaboration.

## MAX DATA COUNCIL

The MAX Data Council is an advisory council – comprised of workforce data experts and researchers – that works to better inform local and state policy makers and practitioners through MAX. The Data Council works to: amalgamate various data sources into a more comprehensive picture of the region with the intention of leading to better outcomes for job seekers and employers; create a peer learning network to empower and enhance the skill sets of research/data staff within entities; and identify opportunities for the more efficient use of data among providers. The council also provides a platform for information sharing and collaboration.

## MAX MEMBER ENGAGEMENT COUNCIL

The MAX Member Engagement Council is an advisory council – comprised of MAX members – that works to provide thought leadership regarding how MAX can best serve and engage our members. The Engagement Council’s work is critical for enabling MAX to meet its mission of strengthening



Metro Atlanta eXchange for Workforce Solutions

connections, collaborations, and practices among our members and other workforce development organizations – and fuels the ongoing retention and recruitment of MAX members. The Engagement Council advises, reviews, and advocates for strategies and actions that contribute positively to the MAX member experience.

## MAX BOARD OF DIRECTORS

MAX is governed by a board of directors comprised of leaders in the public workforce system, voices for business, nonprofit workforce training and human services providers, funders, intermediaries, and employers.

**Jenny Taylor** (Chair)

Vice President of Career Services Goodwill of North Georgia

**Dana Inman** (Vice Chair)

President & CEO  
Atlanta Center for Self Sufficiency

**Tim Cairl** (Treasurer)

Senior Director, Educated Workforce Metro Atlanta Chamber

**Daniela Perry** (Secretary, MAX Minutes Lead)

Vice President, Georgia Chamber Foundation  
Georgia Chamber of Commerce

**John Helton** (Past Chair)

Executive Director CareerRise

**Wendell Dallas** (Board Member Emeritus)

Executive Vice President  
Southern Company Gas

**David Dietrichs**

Attorney  
Utility, Inc.

**John Hallman**

Deputy Commissioner  
Georgia Department of Human Services

**Chris Kidd**

Director of Economic Development  
University System of Georgia

**Kristin Laarhoven**

Executive Director, Office of Workforce Development  
Technical College System of Georgia

**Brett Lacy** (WorkSource Metro Atlanta Liaison)

Deputy Director, Select Fulton  
WorkSource Fulton

**Amy Lancaster-King**

President & CEO  
Long Game Solutions

**Karen Leone de Nie**

Vice President of Community & Economic Development  
Federal Reserve Bank of Atlanta

**Amelia Nickerson**

President & CEO  
First Step Staffing

**Joe Paolini** (MAX Talks Lead)

Vice President  
Bobby Dodd Institute (BDI)

**Dr. Ray Perren** (MAX Academy Lead)

Deputy Commissioner  
Technical College System of Georgia

**Marion Phillips** (Chair, Data Council)

Research Supervisor  
Georgia Power

**Jeannie Ross** (Chair, MAX Provider Council)

Director of Workforce Development  
City of Refuge

**Dr. Victoria Seals**

President  
Atlanta Technical College

**Breezy Straton** (Chair, Engagement Council)

Vice President  
Elevate Douglas

**Dr. Barbara Wall**

Deputy Superintendent  
Georgia Department of Education