



BURGES & BURGES

STRATEGISTS

April 13, 2011

Deborah A. Feldman
Montgomery County Administrator
451 West Third Street
Dayton, Ohio 45422

Dear Debbie:

We are pleased to respond to the request for consulting services to support a community dialogue on the issues regarding regionalism for Montgomery County, Ohio. Our proposal brings together a team of talented professionals with relevant expertise from Wright State University, Sinclair Community College, University of Dayton, Central State University and Burges & Burges Strategists. Sinclair Community College will serve as the fiscal agent. Our joint proposal is attached.

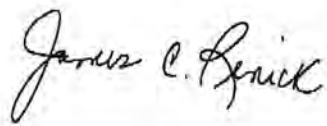
Please let me know if you have any questions or suggested adaptations. We would be happy to respond positively and absolutely delighted to pursue this important work with the county. We look forward to hearing from you.

Thanks as always.

Bill Burges
Burges & Burges Strategists

April 13, 2011


We, the undersigned, have participated in the preparation of the Public Dialogue on Regionalism proposal for Montgomery County, and we are committed to the project's success.



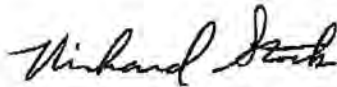
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PUBLIC DIALOGUE ON REGIONALISM

A PROPOSAL TO MONTGOMERY COUNTY

April 13, 2011

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PUBLIC DIALOGUE ON REGIONALISM

I. UNCOMMON COOPERATION IS NOW COMMON SENSE

Despite significant efforts at progress, Montgomery County has suffered serious losses of good jobs, major employers and family income. The impact on communities is direct: people need more services, population shifts are significant, and county and local governments have less money for essential services and governance and economic development. This comes at a time when high-quality, cost-effective communities are necessary factors in attracting and retaining the talent, creativity and jobs the county needs.

How the county approaches streamlining governments, growing the economy and jobs, and sustaining attractiveness to employers and talent are critical questions. Finding more “regional solutions” to local issues is a social justice and an efficiency and development issue. The county must find solutions so its communities, workforce companies, and families can compete.

The pressure for efficiency and “regionalism” has increased given the state budget. We need to “get it right” with well-researched action and sound community buy-in. Many positive practices exist – locally and beyond. Today’s need for efficiency makes it the right time to adapt the way governments do their work and work together to produce greater opportunity for all. Common sense says change is essential for the region to thrive. That requires uncommon cooperation. The stakes – economic prosperity, critical services and our identity and impact as a major county amidst an important region – are high.

II. OUR TEAM

In response to the County’s RFP, experts on Montgomery County from four institutions of higher education [IHE’s] and an Ohio consultancy propose an action-process to help citizens and leaders identify and act on the issues where progress is possible. We propose a well-developed, communicated and engaged set of Community Summits to define opportunities in regional thinking for the county, its communities, employers, workers and families. Experience tells us that examining the issue systematically and openly will encourage enough positive understanding, thought and action to make it worthwhile.

The partners include Central State University’s Dayton Campus, the University of Dayton’s Fitz Center for Leadership in the Community and Business Research Group, Sinclair Community College’s Workforce Development and Corporate Services Division, Wright State University’s Center for Urban and Public Affairs and Burges & Burges Strategists [B&B]. Our experience working with government, business and community leaders on vital issues, and our commitment to the region, is why we are working together.

We believe many efforts will be spawned by the process, issues and divisions will be settled in the process and solid recommendations will emerge. We have the skills and credibility to help produce a process, report and set of proposals that won’t be ignored by better informed and engaged citizens and government leaders.

III. CITIZEN AND LEADERSHIP ENGAGEMENT WITH REGIONAL ISSUES

Our approach can create uncommon cooperation around sound research, engagement, relationships, and communications. The process we suggest can create consensus on action to help our governments and economic development efforts adapt to the new requirements to thrive. To us, that is the intent of the Commissioners' request – and we certainly applaud the Commissioners' leadership. Although we are willing to adjust the timetable, the 2012 calendar year seems to be the optimal time, with a final report and recommendations written during the fall and available at year end.

We suggest that via civic engagement with the issues, facts and values, the area's leaders, citizens and organizations can coalesce to create an environment and agenda more supportive of streamlining governments, growing the economy, and increasing the rate of change on both. Private sector leaders, public officials and concerned citizens will find it in their interests to attend and utilize results. Only local leaders and citizens can define elements of change. Our role is to help them do it via an open, research-based community process in these fiscally and economically demanding times.

The action-research program includes full-blown Community Summits in which citizens and decision influencers can learn about, and produce ideas about what and how to change. Working with a group of local co-chairs and a steering [or resource] committee, we would plan and facilitate a process that includes solid research, open Community Summits, online interactive discussions, and extensive media communications about key issues, grassroots recommendations and likely solutions. Participants would "study" the issues, problems and opportunities. The goal is to engender action on equitable best practices to make government more efficient and our economy more competitive.

The program would be convened by Montgomery County and led by co-chairs including a county commissioner, Dayton city commissioner, Montgomery County suburban mayor, and two private sector leaders. They would lead the civic process. We also envision sponsors who share resources and provide input via a steering committee. We will seek active involvement [perhaps as sponsorships or at nominal cost] by leading broadcast, print and online media organization[s] to communicate content and urgency to vastly expand reach and bring discussions to the homes of thousands who would not otherwise participate. It would also add to the objective, non-partisan nature of the work. Additionally, we would convene a broad, diverse group of organizations to encourage attendance, share content and build understanding among members. [Potential members listed later.]

Clearly, Cox Media is the ratings leader for integrated TV, radio, internet and print news. Involving Cox would raise awareness of residents. Cox also has a new digital production facility, low production rates and a positive record of participation in recent civic issues. We would also seek other commercial print, broadcast, cable and internet media to reach general and niche audiences.

Public media assets such as THINK TV, WYSO and government/public access television could also be excellent partners. THINK TV has a unique following, excellent remote broadcasting capacity, content rich website and much experience on public issues. We would ask THINK TV, Cox Media and other channels to work with us on developing and airing a "kickoff" program to initiate the series, and short form videos to set the tone for each individual Community Summit. These would add immensely to public information and interest.

THINK-TV, WYSO and the public access channels bring local commitment, experience and access to content from partners across the country to help focus residents on similar issues and innovative

solutions. This sector could also be leaders in broadcasting local conversations, formal and informal, about these issues – hopefully working with commercial channels.

Finally, Greater Dayton's key websites, whether based at large media organizations, IHE's, civic and economic development organizations or standing independently like Dayton Most Metro, will be asked to become engaged. They can promote and podcast Community Summits, assist in conducting webinars around the Summits, add online participation and survey input, and initiate and report on conversations among their own audiences. This would build on our own capacity via Wright State/CUPA to construct a webinar component for each Community Summit.

Our goal would be to have all media outlets cover the announcement and offer promotional announcements of the series, write about, broadcast [in full or part] or otherwise cover some of the discussions, and then cover the final report extensively in print, news, and/or public affairs programming. Media partners would be asked to run promotional public service announcements.

Whether or not this level of media involvement is entirely achieved, it is important for strengthening awareness and engagement. Determining the level and net cost [after media sponsorships] will define how far we can go with media involvement. If helpful, we will work with the county to help build commitments to participate from the media, other sponsors and partner organizations between the time the project is funded and when it formally begins.

IV. PROPOSED SAMPLE WORK SCHEDULE

To confront the issues and create forward momentum, the process must produce practical research, build cooperative relationships and create timely action. It will create new energy and collaboration based on facts about problems and solutions. The goal is informed change, with spinoff initiatives taking shape among participants, and a recommended feasible agenda to go forward. Here's how it happens.

1st Quarter: Qualitative, Quantitative and Best Practices Research plus Capacity Building:

The work must be substantively sound and locally relevant. Many aspects of streamlining government and growing the economy are based on community values, individual perceptions organizational cultures as well as other awareness and opinion factors. Therefore developing and sharing data about public opinion is a critical part of our process. Project research staff will collect and report data on public awareness and attitudes, paths to change and how to traverse them.

- Review existing relevant data about the region. Begin best practices research; obtain written/video/audio reports and analyses from other communities; conduct depth interviews with people experienced with regional solutions and countywide collaboration. This work will be concentrated in the first quarter, and continue throughout the year as needed.
- Conduct internal and external depth interviews with elected officials, employers, economic development officials, minority group leaders, civic and faith organizations, young professionals, civic activists and other community leaders, and opinion leaders. We would ask about reasons for and against various types of selected and countywide collaborations or reforms, and determine opportunities, threats and process leadership issues.
- Conduct listening sessions with priority board chairs, neighborhood association leaders, city managers, local activists, clergy groups, chambers, township trustees and administrators, students, individuals who have been voices for or against collaborative efforts, and citizens drawn from the membership of participating organizations. Lead groups in conversations to explore what language they use in discussing regional solutions; what they would or would not support; openness to government consolidations, structural reforms and joint economic development; and the local experience on collaborations thus far. This exploratory research would be done primarily in the first quarter, but could be used as needed to focus on a specific group or topic.
- Conduct a telephone poll of 800 voters and at least one online survey of county citizens to measure awareness and attitudes about regional cooperation for efficiency and growth. These will provide statistically accurate tests of public opinion on possible regional efficiency and development options that were feasible, or inexplicably infeasible, in the qualitative research.
- Note that we would use depth interviews, listening sessions and online polling beyond the first quarter and throughout the work to assess emerging options and obstacles.
- Resources permitting, produce kickoff program, and begin producing video and radio shorts for Community Summit and Internet use.

- Build and launch website, Facebook page and Twitter accounts to share information, involve partner organizations and engage citizen participation.
- Expand the group of sponsors and attract and community partners as appropriate.

These research activities and capacity building activities will enable us to discover and share information about public awareness, attitudes, support and readiness for innovations to help streamline government and grow the economy in a countywide context, or beyond.

2nd and Early 3rd Quarters: Open, Facilitated Community Summits

The program is built on a series of at least three expertly facilitated Community Summits open to and seeking input from all community leaders and county citizens. Each two-hour Community Summit would be guided to produce ideas for the subsequent Community Summits, stimulate side activities, and contribute to the final report. If possible, we would seek to televise key Community Summits via government access channels and podcast via websites.

Community Summits would begin with all attendees convened together for a plenary session and then breakout into groups to discuss key topic areas. For those market segments that won't or can't attend in person, we would set up webinar software in each of the breakout rooms. People can join from home via their PC. Webcams and reasonable audio in the breakout rooms would allow people at home to see and listen to the conversation. People at home could email their points of view or questions. We would also make available via the webinar software or a link to the website where we could poll the people at home. A poll may be in regard to questions that arise during the break out session, or in response to the questions pre-identified for the break out session.

The Community Summits would be held at Sinclair Community College, co-hosted by the Montgomery County Commissioners, co-chairs and IHE's. They would address critical topics determined by the co-chairs, or based on best practices, public input and opinion research. Facilitators would be a diverse and intergenerational team, to encourage the broadest possible perspectives, interest and participation. Depending on the data, topics could include, individually or in combinations:

- Key Regional Demographic, Economic, Financial and Public Service Trends
- Best Practices and Achievements in Regional Cooperation, Service Sharing and More
- Focus Issue: Confidential Opinion Research with Leaders and Citizens
- Focus Issue: What's at Risk? What's to Fear? What Are the Barriers to Change?
- Focus Issue: Is this a Single-County and Multi-County Issue? How do we Approach it?
- Focus Issue: Cooperation for Economic Growth, Workforce Development and Sustainability
- Focus Issue: Collaborating, Consolidating and Reorganizing to Improve the Current Situation
- Moving Forward Together: Specific Initiatives to Achieve Critical Results

A final session to obtain public input on the highest priorities for regional solutions and countywide streamlining and development would be anticipated, but likely in July.

We envision the plenary sessions to be a speaker or panel of local experts, elected or appointed officials, civic leaders, members of the IHE teams and perhaps other experts from nearby regions with regional solutions to describe. A sample agenda for the sessions would include:

- Situational description or update [co-chair];
- Implications or potential spinoffs of the previous Community Summit [facilitators];
- A short video segment outlining the issues and describing approaches from other counties;
- Expert presentation and/or moderated panel of leaders;
- Roundtable small group discussions and reports back to the entire group [facilitators];
- Final comments from attendees, and expert summary [facilitators]; and
- Follow-up input via online comments and surveys.

Timely reports on each Community Summit would be shared with the media, posted on the program's website and shared with others, and distributed via key partners. That way, we can receive community feedback beyond meetings as input for subsequent agendas and the final report. This would come via a project website comments section, online surveys, social networks and media. We believe it will spark healthy debate, strengthen working relationships and lead to collaborative spinoff ideas. We also expect potential spinoffs as a valuable offshoot of the work. Throughout the Community Summit process entrepreneurial collaborations, partnerships and reforms may emerge as leaders and citizens learn and develop their own plans and spin-off activities.

These are preliminary plans for discussion with the county, other sponsoring organizations and co-chairs, but we think they provide a useful framework for proceeding.

3rd Quarter: Determining Convergence of Priorities, Drafting Report and Recommendations

- Meet with chairs, sponsors, employers, public officials, community groups, active summit participants and other citizens to identify common themes and key priorities.
- Hold final Community Summit to review issues, obtain public input on top priorities for regional solutions and countywide streamlining and development, and reach consensus where possible.
- Conduct individual depth interviews and small group sessions as necessary to re-check high priority options and best practices with local and external experts to ensure feasibility.
- Draft report on Summits and recommendations for action.

4th Quarter: Final Report and Rollout

After the November election, co-chairs will finalize and roll out a final report including key goals, major opportunities, serious problems and obstacles, clear strategies and tactics for how to achieve change and expected impact and results. This report has the possibility to be a roadmap, designed by local leaders and citizens, hard for any elected officials and others to ignore. We will plan and execute a major rollout using all available media and possibly a final Community Summit. The communications strategy will be consistent with the tenor of the Community Summits and content of the report. We expect that it will be highly integrated in terms of media and reach all segments of the community.

V. BUDGET PROPOSAL WITH SINCLAIR AS FISCAL AGENT

Fees for Services:

Central State University: \$27,000 [Research, Focused Outreach, Facilitation, Expert Assistance]

Conduct community outreach, individual depth interviews, listening sessions, data analysis and equity-focused best practices research. Support report preparation. Provide focused expertise and assistance on impact of regional solutions on minority communities. Assist in facilitating summits. Provide experts for summits and other assistance. Provide website content.

University of Dayton: \$27,000 [Research, Focused Outreach, Facilitation, Expert Assistance]

Conduct best practices research, design and conduct listening sessions, design and conduct individual depth interviews. Provide focused research, outreach and expertise on economic development, business and job opportunity and government streamlining. Design and lead in-person summit process. Assist with research design and report preparation. Provide experts, other assistance and web content.

Sinclair Community College: \$27,000 [Research, Website, Expert Assistance, Facilitation, Hosting and Fiscal Agent]

Conduct best practices research, design and conduct listening sessions, design and conduct individual depth interviews – primarily focused on workforce development, employer issues and job opportunities. Design and maintain website. Assist in facilitating summits. Provide home site facilities as for summits. Serve as fiscal agent. Provide media resources, experts, other assistance and web content.

Wright State University: \$27,000 [Survey Research, Focused Outreach, Facilitation, Expert Assistance]

Design and conduct telephone survey research and online surveys. Design the electronic participation summit process. Assist with comprehensive research design and report preparation. Provide website content. Take lead in outreach to young professionals, THINK TV, and public radio. Assist in facilitating summits. Provide experts, other assistance and web content.

Burges & Burges Strategists: \$54,000 [Direction, Communications, Research, Facilitation, Reporting]

Direct the project and team. Lead strategic communications, media relations and content development. Serve as key point of contact for Commissioners, co-chairs and team. Lead effort to add financial and in-kind resources. Coordinate overall research design and reports. Assist in facilitating summits. Convene team on a regular basis to assure work flow. Provide experts, other assistance and web content. Burges & Burges has three major roles, 1) coordination, 2) communications, and 3) research, which is the reason for the budget difference between Burges & Burges and the other partners.

TV, Radio and Interactive Communications Support: \$25,000

Seed money to engage media in production and airing of 30-minute program on regionalism and how its principles could make Montgomery County governments more streamlined and conducive to economic development; obtaining footage and producing shorts to begin each Summit; and expanding web and other interactive communications. All are viewed as important for expanding collaborative activities.

Expenses: \$10,000 Pre-approved long distance travel and necessary out-of-pocket expenses.

Total: \$197,000

If more is raised we could expand public information or add summits.

VI. POTENTIAL COMMUNITY SPONSORS AND PARTNER ORGANIZATIONS

The following organizations could serve as financial supporters, in-kind resources, key communicators and community outreach vehicles to strengthen the process and advance participation and results.

- Cox Media
- Central State University
- City of Dayton
- Dayton Area Chamber of Commerce
- Dayton Bar Association
- Dayton Development Coalition
- Dayton Foundation
- Dayton Power and Light
- Greater Dayton Hospital Association
- Sinclair Community College
- THINK TV
- University of Dayton
- Wright State University
- Other Philanthropic Organizations and/or Private Individuals

The following organizations could serve as in-kind resources, key communicators and community outreach vehicles to strengthen the process and advance participation and results. Some may also be sponsor candidates. All will be asked to generate publicity, attendance and conduct satellite summits.

- Congressman Michael Turner
- Dayton Business Committee
- Dayton Metropolitan Housing Authority
- Dayton Metro Library
- Dayton Most Metro
- Dayton NAACP
- Downtown Dayton Partnership
- Five Rivers Metroparks
- Generation Dayton
- Greater Dayton Regional Transit Authority
- League of Women Voters of Montgomery County
- Local Library Systems
- Montgomery County ESC/Dayton Public Schools
- Montgomery County Mayors, Managers and Trustees
- Parity, Inc.
- Organized Labor
- Our Common Heritage
- State Legislative Delegation – Bipartisan House/Senate Representatives
- United Way of the Greater Dayton Area
- Up Dayton and Communications Council
- WYSO
- Other Civic, Faith or Media Partners

VII. ORGANIZATIONAL QUALIFICATIONS

The consulting team brings years of on the ground success in Montgomery County and deep knowledge of the issues involved in regional cooperation to this project. We know the county, its communities and governments, the surrounding communities, and the substantive and communications issues in strengthening regional cooperation.

We also bring an independent perspective. Our professionals have proven expertise in fields such as qualitative and quantitative research, civic engagement, community leadership, county and municipal government, economic development, business, law, marketing, strategic communications and urban-metropolitan affairs. We have a variety of perspectives, record of success and proven capacity to help raise charitable and corporate funds for critical projects. If selected, we view assisting with fundraising as an early order of business.

Examples of our own previous collaboration: Our organizations have worked effectively together:

- Sinclair, CSU and WSU collaborated in 2010 on the Gates Foundation sponsored "Communities Learning in Partnership" planning grant to identify strategies to improve low income young adult success in obtaining credentials with value in the marketplace.
- UD and WSU were partners in developing the Advantage Sharing Program (ASP), a concept for grants and low interest loans to jurisdictions for business development. Twenty-five percent of the funding would be paid back to a workforce development funding pool.
- Sinclair, UD and WSU are currently working on the U.S. Department of Labor Regional Innovation Grant to establish a workforce development implementation plan that responds to industry transformations that have displaced tens of thousands of workers.
- UD and WSU are collaborating to evaluate the Comprehensive Neighborhood Initiative, which assists distressed neighborhoods to make positive, measurable impact on key success indicators.
- B&B has had a longstanding engagement with Sinclair on strategic, research and communication projects; and collaborated with the Fitz Center on projects such as the Neighborhood School Centers, regional dispatch and the DPS Levy [Issue 52]. B&B has also worked effectively with many other IHE's for 28 years, and its principals have decades of higher education experience.

We have come together for this project because the stakes for the region are so high, and we are confident that our experience will enable us to work effectively as a team.

Our team is deeply committed to the work and approach outlined here. We are ready to work with the county commissioners and your team in shaping our proposal into a work plan well suited to achieving the goal of improving awareness, attitudes and action agendas to streamline government and grow our economy. We have the advantage of local knowledge and broad perspective. We are experienced with the individuals, organizations, media and political-economic terrain of the area. With an agreed upon process design, our diverse, credible team is poised to help this vital project succeed. Please let us know if our proposal needs modification from your perspective. We look forward to hearing from you soon.

A) Burges & Burges Strategists

B&B will direct the project, work directly with the co-chairs, assist with research design and reporting, manage communications and guide the process. We are qualified [www.burgesandburges.com] with significant experience as educators, facilitators and researchers and work on in regional expansion and government reform projects. We know the area well, after years of work for the Human Services Levy, Sinclair Community College, Dayton Metro Library, Dayton Public Schools, the Miami Valley Regional Planning Commission, GDRTA, the Greene County Public Library, Greene Memorial Hospital, Miami Valley Career Technology Center, United Way and others.

B & B specializes in public and public-private issues, working primarily in Ohio. Clients have included government institutions, public service agencies, schools and colleges, health care providers, businesses, non-profits, elected officials and coalitions. Our professional backgrounds are research, public [K-12] and higher education, law, management, elections, community engagement, media and urban affairs. We bring on-the-ground and statewide perspective, enabling us to deal with issues through objective external eyes, and the data from local contacts. We have worked well with area leaders, are members of the Dayton Area Chamber of Commerce, in the Miami Valley weekly and have an office located at Shook Construction. We can provide you with many excellent recommendations.

We have worked closely with significant institutions to make their services more efficient, as well as to reform government. This work requires effective research, planning, relationships, communications and judgment. Examples include:

- Serving as the lead consultant for winning the election for Cuyahoga County Reform;
- Researching and assisting with Sinclair's regional [Warren and Montgomery] strategy;
- Developing the concept and data to support the new Eastern Gateway Community College;
- Helping Southwest Ohio officials turn back a legislative attempt to cut local government funds;
- Serving as lead consultant for developing and funding Lorain County Community College's University Partnership, the first in Ohio;
- Leading the election to keep mayoral control of the Cleveland Municipal School District;
- Expanding or initiating funding into new locales for regional services such as transit and libraries;
- Providing full-service communications to establish four Joint Economic Development Districts between Akron and various townships in Summit County;
- Serving as key consultants to create, fund and sustain Cuyahoga Arts and Culture; and
- Conducting and reviewing extensive research in the Miami Valley and elsewhere that has kept us in tune with public perceptions and communications requirements for regional collaboration.

Each of these engagements required us to work closely with clients and communities to rethink the way services would be provided or revenue would be raised.

The B&B team for this project includes [see www.burgesandburges.com]:

- **Dr. Bill Burges, President**, would serve as staff director of the project, participate in the final design and execution of the action-research process; assist the commissioners and chairs in fundraising for the project; meet with project leaders, sponsors, and other community constituents as appropriate, and direct research, reporting and follow-up.
- **Galen Schuerlein, Vice President**, would serve as assistant director of the project working with Dr. Burges on all aspects of work as necessary and appropriate.
- **Charlene Moskal Burges, Vice President and Valeri Furst, Consultant**, would provide presentation training.
- **Nick Pecko, Media Producer and Buyer**, would work to integrate the efforts of media partners.
- **Darryle Torbert, Research Associate**, would assist with media relations and research.

B) Central State University

Central State University's Dayton Campus is a conveniently located downtown facility which serves as the University's Urban Center. Established more than 30 years ago, it is the University's Hub for Urban Education, Community Engagement and Workforce Development. It offers four bachelor level degree programs, in Business Administration, Social Work, Early Child Care and Learning and Criminal Justice. Recently, CSU re-structured its College of Arts and Sciences into the College of Liberal Arts, Humanities and Social Sciences and added a fourth college, called Science and Engineering.

Central State views this project as a "win-win" opportunity. In addition to offering training for our students, it will provide the Dayton Campus a chance to engage resources in a significant community effort which clearly aligns with its commitment to community partnership, growth and development.

University President, John W. Garland, recently launched an initiative in West Dayton to facilitate a community dialogue and develop an action plan to address the declining social service safety net in the western part of Montgomery County. The University's commitment to that effort gels well with this initiative. By convening and facilitating meetings, offering expertise for strategic and fiscal planning, and crafting business plans CSU will assist local nonprofits to transform their organizations. That same skill set as well as provision of resources will aid in efforts to streamline government.

In partnership with the Urban League of Greater Cincinnati, Central State, Dayton Campus now houses the Mature Workers Program and will soon provide certificate training and specialized workforce development courses and programming to service their growing constituency.

Central State will work collaboratively to offer facilities as well as expertise from the College of Business to convene and facilitate meetings (free parking).

Because the University has already begun to convene West Dayton stakeholders, including the faith community, and engaged them in discussions about sustaining the safety net through increased collaboration and identifying new resources within the nonprofit sector, it can provide some creative suggestions for shared services and "offloading" some dependency on government for those services.

The University will also provide topical experts for panels and other presentations. The Dayton Campus is also equipped with distance learning and online technology to allow for participation by those who are not able to be physically present for meetings.

Central State has the unique ability to convene the minority community and many of its partners and engage their participation in a change process. For this project we would assign the resources of:

- **Charles Showell, Dean of the College of Business and Industry and faculty and students of the college.** Dr. Charles H. Showell, Jr. is Dean of the College of Business and Industry. He holds a Ph.D. in Business Administration from The Ohio State University, a Master's of Science in Logistics Management from the Air Force Institute of Technology and a Bachelor of Science Degree in Mathematics from the University of Maryland, Eastern Shore. As Dean, he is responsible for three departments that comprise the college. These departments are Business Administration, Water Resources Management and Manufacturing Engineering. Additionally, Dr. Showell is a certified Grievance Mediator, Arbitrator, and Fact-finder for the State of Ohio. Since his appointment as dean in 1988 Dr. Showell has led the college through many significant changes. One such change has been the establishment of a "Triad for Success" for college majors. This triad consists of a professional development curriculum, experiential learning, in addition to the traditional classroom instructions. Based on his leadership, Dean Showell was awarded the Academy of Business Administration's National Leadership Award in 1996.
- **Dr. James C. Renick, Senior Advisor to the President and Dean of the CSU Dayton Campus and faculty, staff and students of the college.** Dr. Renick is a recognized leader in university/business/industry relations. He received his B.A. from Central State University in 1970, where he was inducted into the Donald K. Anthony Achievement Hall of Fame. He earned an M.S.W. from Kansas University in 1972, and a Ph.D. degree in Government/Public Administration from Florida State University in 1980. He served six and a half years as Chancellor and Professor at the University of Michigan-Dearborn followed by nine years as Chancellor and Professor of Political Science at North Carolina A & T University in Greensboro. Following retirement from North Carolina, he served as Senior Vice-President for Programs and Research at the American Council on Education in Washington, DC. He serves or has served on numerous national boards and foundations including the Presidential Board of Advisors on Historically Black Colleges and Universities, the North Carolina Board of Science and Technology, the National Council for Science and the Environment, the National Association of State Universities and Land Grant Colleges, the Thurgood Marshall Scholarship Fund, and the National Science Foundation's Human Resources Division Advisory Board.

C) University of Dayton

University of Dayton Fitz Center for Leadership in Community: Carrying out the University of Dayton's vision as a national leader in educating community builders, the Fitz Center for Leadership in Community initiates and sustains partnerships with urban neighborhoods and larger communities for both comprehensive community building and as a context for connected learning and scholarship. The Center stimulates, coordinates and facilitates learning and scholarship throughout the University, within the community and between the two.

The University of Dayton would host Community Summits; facilitate focus groups and listening sessions with residents and leaders; moderate forums and panels; provide research on demographics and economics; prepare and assist leaders to increase collaborative activities; contribute panelists who can knowledgeably present the issues in terms of government services, economic development and critical trends; and assist in the preparation and communication of project reports.

The UD team for this project includes [see www.udayton.edu]:

Fitz Center for Leadership in Community has strong experience in relevant issues and processes.

Don Vermillion: Don Vermillion served as a local government administrator from 1973-1997. From 1973-1976, Don was the Assistant City Manager for Miamisburg and he later served as City Manager from 1976-1979. During 1979-1988 Don served as Montgomery County Deputy Administrator and served as Montgomery County Administrator from 1988-1997. He has been teaching in UD's MPA Program from 1992 to the present. Don has worked for the University of Dayton since leaving active local government administration. Don's present projects include coordinating the Dayton Neighborhood School Centers program for the University of Dayton. Don has also worked with the Dayton Salvation Army in developing the Ray and Joan Kroc Center in north Dayton, and has served as a city manager search consultant for five communities in the Dayton region.

Dick Ferguson: Dick Ferguson has held several major administrative positions in 38 years at the University of Dayton. In 1992, Dick became Assistant to the President for Regional and Government Relations at the University of Dayton. Besides his routine community and government relations responsibilities, Dick served as lead staff and final report writer for the Montgomery County Child Protection Task Force, assisted with planning of the Dayton Area Graduate Studies Institute for advanced engineering education, and formed the Serve With Energy and Talent (SWEAT) collaborative and corporation -- one of Ohio's first AmeriCorps national service programs. Dick led the University's community partnership initiatives and, in October 1998, was named Director of the Institute for Neighborhood and Community Leadership (INCLUD). In July 2001, INCLUD and the Center for Family and Community Research merged to form the Center for Leadership in Community, part of the College of Arts and Sciences. Dick was named Director of the new Center and Special Assistant to the President. The following year, the Center was renamed in honor of Brother Ray Fitz as he completed his 23-year tenure as President of the University of Dayton. Dick began full-time service as Executive Director of the Fitz Center.

Brother Ray Fitz: Brother Raymond L. Fitz, S.M. was the longest-serving president in the University of Dayton's history. He stepped down from his position after 23 years in June 2002 and now works in the Fitz Center as the Ferree Professor of Social Justice. This position works to connect Catholic social teaching and the social sciences through the community-building mission of the Center.

Dr. Grant Neeley: Grant Neeley teaches and conducts research in several public policy fields, public administration, state politics and political behavior. Prior to joining the UD faculty, Grant was on the faculty at Texas Tech, the University of Cincinnati, and Ball State University. He also serves as a Public Affairs Officer in the Navy Reserve. He has been Director of the MPA Program at UD since May 2007.

The University of Dayton Business Research Group (BRG) focuses on program evaluation and economic analysis in the public and non-profit sector. It also has expertise in private sector market research including focus groups and online surveys. Its mission is to apply economic analysis and acquired local area expertise to the core public policy issues of the Dayton region. These issues encompass economic

development, education, housing and health care. BRG has the ability to apply economic thought to urban and regional studies in the area of education, housing, health care and the economy and an applied knowledge of the Dayton region in each of these same areas linked to the conduct/completion of projects over the past 25 years.

BRG has the capability to participate in the research elements of the project including best practice and case study work. The Business Research Group has participated in a variety of past research projects that bear on the current issue including:

- Documenting the economic backdrop to the current fiscal crisis for the Montgomery County government and projecting potential futures
- Analyzing the potential to create a common code enforcement service across Montgomery County jurisdictions for the Montgomery County government
- Investigating Ohio municipal best practice in information technology integration for the City of Dayton
- Surveying online elected and appointed officials for a public utility on service related issues
- Analyzing potential revenue options for the City of Dayton
- Conducting economic impact studies for local governments and organizations
- Forecasting the local economy since 1994
- Analyzing local government employment with some establishment / function level elements by employment and wages using ES202 data from the State
- Interviewing regional colleges and universities on shared interests
- Conducting a year-long public strategic planning process for the Priority Boards of the City of Dayton where they determined steps they would take to influence a key set of indicators

In addition, BRG has particular expertise in online survey work and has conducted several studies that have solicited public official responses online. Finally, BRG has a state of the art focus group facility with an observation room and a 4 camera set-up. Dr. Stock is a skilled moderator.

The BRG team for this project includes:

Dr. Richard Stock, Director, Business Research Group. Dr. Richard Stock is the Director of the Business Research Group (BRG) at the University of Dayton, (since 2001). He has been at the University of Dayton since receiving his Ph.D. in Economics from the University of Colorado, Boulder in 1986. His academic training was in urban economics. He has 27 years of experience in economic analysis, program evaluation and market research. He forecasts the regional economy periodically as part of that work.

Ms. Kim Gilley, Research Manager, Business Research Group. Ms Gilley is responsible for the day to day management of research operations at the Group. In addition to her operational role in survey and focus group management, Ms. Gilley manages some research projects and provides data analysis and interpretation. Her degree is from the University of Dayton.

Other University of Dayton Resources:

L. William Crotty Center for Entrepreneurial Leadership, Robert Chelle: Bob Chelle is a lecturer and Fifth Third Bank Entrepreneur in Residence & Director, Crotty Center for Entrepreneurial Leadership at

the University of Dayton. Prior to his work with the University of Dayton, Bob was the owner and President of High Voltage Maintenance Corp, a Dayton firm. Under his direction, High Voltage Maintenance became the largest independent electrical testing and maintenance company in the Midwest. In 1996 Bob sold the business to Emerson Electric, a Fortune 500 company. He joined the L. William Crotty Center for Entrepreneurial Leadership in 1999.

President's Office, Ted Bucaro: Ted Bucaro is the Government and Regional Relations Director for the University of Dayton. In this role, Ted works very closely with University of Dayton President Dr. Dan Curran in working with the local Dayton community. Ted has been a key player in the Genesis Project that has brought commercial and residential redevelopment to the Brown Street area. Before his work with the University of Dayton's President's Office, Ted worked at the City of Dayton in the Office of Management and Budget.

D) Sinclair Community College

In response to the region's economic transformation, Sinclair Community College created a division focused on employers and workforce development. Workforce Development & Corporate Services was formed in 2006 with the mission of "meeting the workforce learning needs of individuals, employers and the community through an array of innovative, high value, customer focused programs and services." As an organization, Workforce Development & Corporate Services is committed to the core values of responsiveness, innovation, financial stewardship, integrity, and collaboration.

Sinclair's Workforce Development & Corporate Services division focuses on the following:

- Providing training and consulting services to employers
- Continuing education programs – non-credit training for industry credentials, skills building and professional development
- Economic development through partnerships within the region including growth markets

Sinclair will host the summits at its Sinclair Conference Center, a long-standing community asset that has functioned as a gathering place for community issues and initiatives. This state of the art facility offers a variety of meeting spaces appropriate for any type of meeting/discussion interaction that includes the latest technology and multi-media support.

Sinclair will function as the fiscal agent for the project. Sinclair has extensive experience in the execution of contracts with Montgomery County for services delivered.

Leveraging key relationships, Sinclair will be as a connector to many stakeholders including workforce development and business leaders, economic development organizations and non-profit organizations.

Sinclair will provide assistance to the project in the areas of technical support (information technology, multi-media) as well as in marketing and communications (social media, messaging). With over 26,000 students enrolled in the college for college credit courses and another 12,000 students in workforce development programs, Sinclair has access to students to assist with the project many ways.

Last, because Sinclair has served as the project manager for the Regional Innovation Grant (RIG) which focuses on the workforce supply and demand data to determine strategic priorities as well as create a systemic model for workforce development within the region, in collaboration with WSU's Center for Urban and Public Affairs, Sinclair can assist in leveraging the findings and recommendations of the RIG.

The Sinclair team for this project includes [see www.sinclair.edu]:

Deborah Norris, Vice President of Workforce Development and Corporate Services. Ms. Norris obtained both her M.B.A. and B.S. in Business from the University of Dayton. She has been at Sinclair since 2006. Prior to Sinclair, Deb's experience includes 20+ years in management consulting, marketing and new business development in a variety of environments including a Fortune 100 company, a business to business brand consulting firm, a technology start-up, and a human resources/management consulting firm. Deb is very active in the community and serves on a number of boards including the Dayton Area Chamber of Commerce governing board and executive committee, the National Composite Center, EMTEC, and Daybreak. Deb was recently appointed as an Associate Director of the Wright Patt Credit Union Board of Directors.

Alexis Duff, Strategic Financial Manager. Ms. Duff began her career at Sinclair in 1993 as the Manager of General Accounting and has served in a number of financial positions within the college. She joined Workforce Development & Corporate Services in 2007 in the newly appointed position of Strategic Financial Manager. Ms. Duff has a B.A. in Organizational Management from Wittenberg University.

E) Wright State University

The Center for Urban and Public Affairs is an applied research center focused on workforce and economic development, education, community development, housing, and population-based health issues. Established in 1986, the Center has developed a knowledge-base of Ohio, Ohio's regions, and their social and economic dynamics. The mission is to provide data and information to government, nonprofit, for-profit, and community-based organizations ultimately to improve the quality of public systems and services. Expertise is in project management, planning, survey research, statistics, GIS, Joint Application Development (JAD), and database mining, management, and applications.

WSU has capability that could be contributed to every task in the scope of work, and the following provides a framework to describe how its involvement can be most beneficial to the team.

The project will begin with primary data collection, and primary and secondary data analysis. WSU has a 16-seat Computer Aided Telephone Interviewing laboratory, two professional staff members overseeing the work, and graduate student supervision aided by WinCATI. We envision conducting a telephone poll of voters, resulting in 4-800 completed interviews. The survey would relate government services and governance. For example, a result of the survey may be citizen ratings of government services from those most suited to regional service delivery to those they think should be locally provided.

Wright State would help investigate best practices to answer critical unresolved questions or support key ideas about new initiatives, conducting cost-benefit analyses, and developing collaborative models.

Wright State has collected data on various matters that could contribute to the initial framing of the approach. Some examples include:

- Shared service delivery among school districts—existing practice and barriers to change

- Shared service delivery among local governments
 - o Statewide survey of barriers and areas where shared services are happening.
 - o Research on additional opportunities for shared services
- Industry analyses for every economic development region in Ohio and a statewide report, including employment projections to the year 2020
 - o Capacity to summarize and analyze the County's Business First! Data
 - o Access to raw Quarterly Census of Employment and Wages (QCEW) data for Ohio; the Harris Selectory; and EMSI data for easy comparison of US counties across the US
 - o IMPLAN, for local economic impact analysis of industry investments or departures
 - o ARC Info as our Geographic Information Systems software
 - o Working with UD, we have conducted the ASP (Advantage Sharing Program)
- Workforce development analysis, studying historic restructuring and projections
- City of Dayton Opinion Survey: Citizen Perceptions of Government Services, biennial since 1997
- Miami Valley Regional Planning Commission survey on regionalism and governance, followed by a series of community dialogue sessions

Beyond the specific and in some ways unique contributions that Wright State can make to the effort, Wright State will serve as a member of a team:

- Providing background materials on demographic and socioeconomic trends in the region, and comparative analyses to like communities and markets
- Partnering with other institutions to conduct the qualitative research such as partnering to conduct focus groups with elected and appointed officials
- Engaging WSU experts as presenters and panel members for forums
- Conducting webinars to convene people using means other than in-person meetings (the software we use is Adobe Connect). We have also used this webinar software, along with webcams and microphones, to convene citizen focus groups wherein leaders may listen from a home or office computer. Citizens give consent, and then engage in open dialogue; leaders have the benefit of hearing first hand and noting items that carry emotion, passion, etc.
- Work with others on televised coverage for both broadcast and online use

The WSU team for this project includes [see www.wright.edu]

Dr. Jack Dustin, Director, Center for Urban and Public Affairs, Chair, Public Administration: Dr. Dustin earned his Ph.D. from the University of Delaware. He teaches in the Urban Affairs and Master of Public Administration program, serves as the chair of the Dayton Technology Assistance Panel, is past president of the Miami Valley Chapter of the American Society for Public Administration, and is currently the

President of the Wright State University Chapter of Phi Kappa Phi. Research and scholarship include urban development, ethics, and technology policy.

Jane L. Dockery, Associate Director, Center for Urban and Public Affairs: Ms. Dockery obtained her M.B.A. from the University of South Dakota, AFIT. She has been with CUPA since 1990. Her areas of specialization include strategic planning, focus group methodology and facilitation; program evaluation, micro-level health care and economic development research, especially focusing on strategic change in each of those industries. She also teaches courses on Economic Analysis of Neighborhoods and Regions, Urban Economic Development, High Performance Work Places and Work Teams.

David Jones, Research Associate II, Director of Survey Research: Mr. Jones coordinates training of survey interviewers, manages the day-to-day operations of all survey research activities and assists in survey development and implementation. Mr. Jones has completed over 100 surveys of diverse populations that span from neighborhoods, cities, counties to statewide. He has conducted a Citizen Perception survey for the City of Dayton every two years over the last ten years. Mr. Jones has a BS and a Master of Public Administration degree from Wright State University.

Carol Hooker, Research/GIS Data Analyst: Ms. Hooker is experienced in database management, quantitative data analysis, and spatial data analysis using Geographic Information Systems (GIS). She has been involved in numerous projects in the past and served as the principal investigator for the Miami Valley Emergency Management Authority project. Ms. Hooker holds a BS and a Master of Public Administration Degree from Wright State University and an Associate Degree in Architectural Technologies from Sinclair Community College.

Graduate and Undergraduate Research Assistants: Graduate and undergraduate research assistants play a large role in data collection and the productivity of the Center's research activities. Undergraduate research assistants collect data using Windows Computer Automated Telephone Interviewing (CATI) technology. The CATI system eliminated the need for coders and data entry persons, thereby reducing errors. Graduate students provide broad support to full-time staff including data processing and interpretation and logistical support.

APPENDIX: SCOPE OF SERVICES WITH TEAM MEMBERS

The consulting team will provide or attract the resources working with approval from the co-chairs and steering committee, and serve as lead staff for the following program of work:

Ongoing Expert Support:

- Provide overall project research and presentation support as a consulting team based on decisions of the co-chairs and steering committee within the overall plan outlined above. [ALL]
- Provide guidance, strategic support and resource development assistance as appropriate for reasonable number of spinoff activities approved by the co-chairs and steering committee. [ALL]
- Staff monthly meetings of the co-chairs, other work Community Summits as needed and steering committee and bi-weekly meetings or conference calls among project staff. [B&B]
- Manage media, public and constituent group relations with the approval of the chairs. Work to engage and coordinate the work of media partners/sponsors with donated resources of at the lowest possible cost. [B&B]

Resource Development:

- Assist the co-chairs in preparing proposals and presentations to obtain sufficient funding, in-kind resources and partnerships for the regional collaboration initiative. [ALL]
- Assist the co-chairs in getting buy-in from sponsors, steering committee members and partners. [ALL]
- Assist in determining the feasibility of grant funding, in-kind support or partnerships to support recommended high priority next steps. [ALL]

Background, Opinion and Ongoing Grassroots Research:

- Design a research program to gather data consistent with the commissioners' and co-chairs' goals, consistent with the eventual project budget. [ALL]
- Develop background materials such as demographic and socio-economic trends in the region, comparative analyses to like communities and competitive markets, best practices and cost-benefit analyses of realistic scenarios, hypothetical collaborative models for the region and projections of key initiatives from Community Summits. [CSU, UD, SINCLAIR, WSU]
- Conduct qualitative research [individual depth interviews, listening sessions and Community Summits] with elected and appointed officials, diverse community leadership constituencies and county citizens to determine how they think about these issues and create opportunities for them to collaborate. [CSU, UD, SINCLAIR, WSU]
- Facilitate a limited number of follow-up conferences and visits within budgetary parameters, and prepare reports on those for the entire group. [UD lead, ALL]

- Conduct a telephone poll of voters and at least one online survey of citizens to measure awareness and attitudes about regional cooperation for efficiency and growth. [WSU, B&B]

Communications and Engagement:

- Plan communications to promote Community Summits and engage citizens. [B&B lead, ALL]
- Host and facilitate Community Summits, working with media partners to broaden awareness and involvement. [CSU, UD, SINCLAIR, WSU]
- Utilize technology to maximize the reach of the Community Summits. [CSU, UD, SINCLAIR, WSU]
- Assure the design, development and maintenance of an interactive website and social networking capacity to provide a regular stream of active, useful, current information and to facilitate communication, relationships, and follow-up activities by participants. [SINCLAIR lead, ALL]
- Develop and distribute a quarterly report on the project's progress, which would be posted on the website, be used by the chairs and committee members for public presentations, and form the basis of media briefings, Q & A, and key regional stakeholder meetings. [ALL]
- Develop a schedule of public presentations about the need for greater regional cooperation, design presentations with key messages and updates, and provide presentation training for speakers' bureau drawn from the chairs, committee and participants. [B&B lead, ALL]
- Develop and execute an earned or cooperative media plan including print, online, radio and TV to make the project accessible to people who cannot attend events. [B&B lead, ALL]
- Reach out to community stakeholders throughout the process. [ALL]

Community Summit Activities

- Work with the co-chairs to develop a detailed agenda and substantive support materials and links for the entire program and each Community Summit. [UD lead, ALL]
- Engage appropriate presenters and panel members for each Community Summit, make sure presenters and panel members are well-prepared for the discussion, and debrief leaders and others after each Community Summit to determine if follow up support or other action is appropriate. In many cases this involves working directly with local, county and private sector leaders to bring them the details of how greater collaboration could work, both substantively and politically. [UD lead, ALL]
- If appropriate, identify and select interactive in-meeting technology [name] to quantify consensus, rate ideas, best practices and applicability to our region – and to revisit previous agenda items and recommendations when important new data or consensus emerges. [ALL]

- Provide a written summary of all Community Summits to the committee and participants, including a record of the presentation, questions, answers, unresolved issues and spinoff activities. [CSU, UD, SINCLAIR, WSU]
- Conduct and report on best practices research to answer critical questions and/or support key ideas about new initiatives that emerge from the Community Summits. [WSU lead, ALL]
- Develop and distribute materials after each meeting, and present the above summary of the previous Community Summit and new resources for participants at the subsequent one. [CSU, UD, SINCLAIR, WSU]

Final Report

- Prepare, distribute and communicate a final report reviewing the data, describing the Community Summits and their critical work, detailing major options, and making specific recommendations as considered in the Community Summits and approved by the co-chairs and steering committee. [ALL]