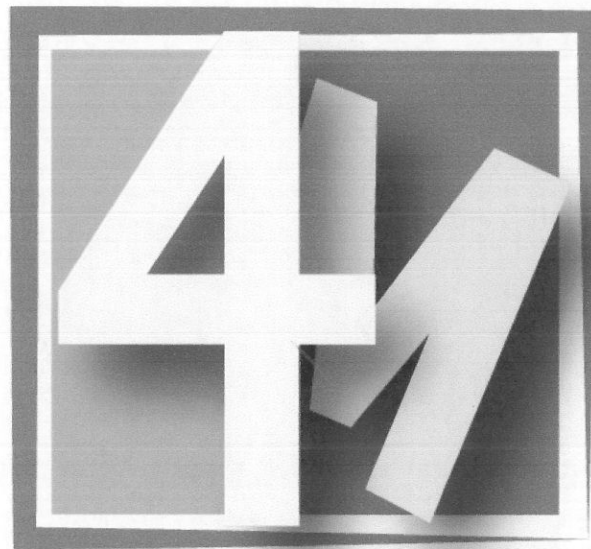


Response to Request for Qualifications  
Strategic Facilitator  
#20-19

for  
City of Peoria



**EDUCATIONAL  
SERVICES**

Subsidiary of J Morris Enterprises, LLC  
1210 S. Jasper St.  
Decatur, IL 62521  
(217) 474-1907

[Juanita@JMorrisEnterprises.com](mailto:Juanita@JMorrisEnterprises.com)  
Federally Certified Disadvantaged Business Enterprise (DBE)



## LETTER OF INTEREST

City of Peoria  
Mr. Chris Switzer, Purchasing Manager  
Room 108, City Hall  
419 Fulton Street  
Peoria, IL 61602-1276

April 25, 2019

4M Educational Services  
J Morris Enterprises, LLC d\l\b\l  
1210 S. Jasper St.  
Decatur, Illinois 62521

Dear Mr. Switzer:

This submission is intended as a submission to the City of Peoria, Illinois, Request for Qualifications for Strategic Facilitator.

4M Educational Services has compiled an overall team of consultants who are qualified individually, but bring a different level of strength to the scope of the project in its entirety. With three consultants dedicated to the effective facilitation for the City of Peoria, each area of focus and expected outcome will be met. One consultant has supported work in city government; the second has an emphasis in research methods and data analysis, while also facilitating courses in team dynamics. And, the final consultant brings a wealth of experience in facilitation and training, team dynamics and the development of entrepreneurs and the impact on local economies. This is an exceptionally skilled and diverse team of consultants who are committed to working on this project with the City of Peoria.

4M Educational Services, being a federally certified Disadvantaged Business Enterprise and Minority Owned company, has established a project team that is more than capable of meeting the expected requirements of the project. As such, 4M Educational Services fully complies with RFQ Minimum Qualifications.

4M Educational Services fully intends to comply completely and wholly and in its entirety with the terms and conditions of the Agreement as specified in the provided RFQ and any all associated documents. 4M Educational Services also agrees with intent to fully comply with all applicable Illinois Laws and City of Peoria Ordinances.

It is our hope to serve the City of Peoria as the company selected to support the work to continue moving the City forward. As a team, we look forward to the opportunity.

Sincerely,

  
Juanita M. Morris

[Juanita@JMorrisEnterprises.com](mailto:Juanita@JMorrisEnterprises.com)

Mobile – (217) 474-7300

Office – (217) 474-5007

Fax – (800) 547-5892



## **RESUMES**

4M Educational Services will assign three consultants assigned to the City of Peoria's request for the Strategic Facilitator RFQ. We believe and value a diverse experience and perspective and believe differing perspectives will be essential in guiding conversation and facilitation to meet the goals of the this project. We not only understand organizational change specific to the community, we also studied organizational change and facilitated organizational and community change. Credentials for each facilitator, Janet Kirby and Juanita Morris, who will participate in Peoria's project are below.

# Janet A. Kirby, PhD

## EXECUTIVE OVERVIEW

Accomplished professional with experience in not-for-profit, public and higher education business sectors. Skilled communicator with the ability to see and understand the overlapping impacts of policy and practice on constituencies and to advocate for what is needed. Successful service to boards both as Executive Director working for a board and as a board member in leadership positions. Strong understanding of the inner-workings of government on the municipal, state and federal level. Skilled at building coalitions for innovative solutions to demands presented by the realities of funding, constituent need, and organizational capacity. Experience with developing and sustaining internal and external partnerships. Relationship and positive mindset driven.

### Core Competencies

Meeting facilitation  
Strategy development and execution  
Partnership building internal and external

Coalition builder  
Organization development and change  
Strong communication skills

## CONSULTING EXPERIENCE

### **City of Springfield Office of the Mayor Contact: Mayor Jim Langfelder and Director of Communications Julia Frevert**

Ward Meetings 2015-2018

- Developed ward community meetings.
- Facilitated four sets of community meetings totally approximately 800 citizens each round.
- Created framework for qualitative data analysis.

### **City of Springfield Division of Economic Development December 2016**

#### **Strategic Planning Director Val Yazell (Consulting Engagement was under Prior Director Karen Davis)**

- Developed Framework for Strategic Planning Process
- Facilitated Staff Strategic Planning Process

### **SIU School of Medicine – HR Department – David Ziebler**

#### **Strategic Planning Workshop April 2016**

- Met with leadership to understand goals for the planning process.
- Developed a proposal for conducting the planning meeting.
- Facilitated Strategic Planning workshop for 10 person HR staff.

### **Senior Health Insurance Program (SHIP)**

#### **Annual Conference Series Keynote Speaker 2012**

- Delivered keynote address to each of four regional conferences attended by approximately 100 volunteers and staff.
- Title: Strategies for Success

### **American Lutheran Church, Oslo, Norway 2011**

#### **Congregational Retreat Workshop 2011**

- This congregation was welcoming a new pastor and the retreat was a way to get to know each other and was structured as an Appreciate Inquiry Summit. The outcome was a design

for what the congregation wanted to accomplish in the next year. It also allowed the new pastor to quickly grasp the culture of his new flock.

- Title: Appreciating Our Past for a Greater Future

#### **Central Illinois Organization Development Network (CIODN)**

##### **Board Summer Retreat 2010**

- Facilitate development of a plan for growth and programming for the next year . The results of the workshop were collection of ideas, identification of priorities, assignment of tasks and timeframes for delivery.
- Title: Growing Our Members.

#### **PP-Lederforum in Oslo and Akrshus, Oslo, Norway**

##### **Workshop on The Fifth Discipline 2007**

- This group of school psychologists from the Oslo region was interested in exploring the use of the concepts of American writer Peter Senge in creating learning organizations. The results included logos for the projects they developed over the course of the workshop as well as project details and deliverables. The services of a translator were used as necessary. This unique experience for the attendees (35) was to hear the work of an American Scholar delivered in his own language and culture.
- Title: Exploring the Fifth Discipline: the Art and Practice of the Learning Organization

## **OTHER WORK EXPERIENCE**

#### **Benedictine University**

##### **Campus Director Springfield Branch Campus 2017-2018**

- Develop budget and manage financials.
- Initiate and develop business to business partnerships with organizations in central Illinois
- Manage day-to-day operations
- Represent university to externals such as City, Chamber, Newspaper, Radio

##### **Associate Dean 2012-2017**

- Develop MBA in blended modality resulting in enrollment of 150 students in 12 months.
- Recruit and train 25 instructors for graduate and undergraduate business and psychology undergraduate programs.
- Design and teach courses in organization behavior, strategic management, team building, humanities.
- Collaborate with adult programs VP on strategic planning process and facilitated planning sessions.
- Design and co-present faculty development program based upon Strengths Finder.
- Develop new budget format for Graduate and Adult programs allocating revenue to expenses.
- Advised Dean as Cabinet member during adoption of new General Education Curriculum.
- Produced Springfield lectures in Organization Development with attendance of approximately 80 per summer event over the course of five years and one Public Health speaker event on the impact of the Affordable Care Act on the Public Health sector with attendance of 50.

#### **Director of Graduate Business Programs, October 2011 - August 2013**

- The Director of Graduate Business Programs has full oversight of three (3) degree programs - MSMOB, MBA and Ph.D. - including development of schedules, recruiting students and hiring and supporting faculty. Specific accomplishments include:
- Achieved goal of developing Ph.D. program for the Springfield campus and enrolling 14 students in the second group and 8 students in the third group of students generating gross revenue of

\$2.2 million with 95% of students completing degree requirements.

- Enrolled 65 students in executive master level programs.

#### **Ph.D. Program Coordinator, (Part Time) April 2008 to October 2011**

As a part time employee of the university responsible for building the Ph.D. program including recruiting first group of Ph.D. 10 students, arranging faculty and facility logistics. Specific accomplishments include:

- Successful launch of Ph.D. program and generation of \$900,000 in revenue from Group 1.
- Production of inaugural annual lecture series for Springfield drawing over 75 participants from throughout the community.

#### **State of Illinois**

Illinois Comprehensive Health Insurance Plan (ICHIP)

Chief of Board Office Operations; Director of Outreach Activities; Director of Underwriting; Director of Communications, January 1998 to December 2009

Senior leadership position responsible for a series of transitions in the agency including relocation, Board of Director meetings and minutes, liaison to building management, national association and outreach to general public in coordination with other state agencies. Specific accomplishments include:

- Planned and implemented relocation of ICHIP headquarters including drafting floor plan, working with architect; coordinating electrical, communications and IT, contracting with movers and security of sensitive protected health information of plan participants.
- Directed the process of hosting a national conference of the National Association of Comprehensive Health Insurance Plans in Chicago.

#### **Illinois Industrial Commission**

Executive Director, Illinois Self-insurers Advisory Board (ISIAB), June 1990 to January 1998

The ISIAB was responsible for determining which corporations in Illinois had the financial wherewithal to self-fund Worker's Compensation obligations. The Executive Director oversees a staff of 10 including accountants, claims examiners, financial analysts and administrative support staff. Significant accomplishments include:

- Hosting Regional (200 Attendees) and National (900 Attendees) conferences of the International Association of Industrial Accident Boards and Commissions.
- Eliminating multi-year backlog of applications through implementation of a process improvement system.

## **TEACHING EXPERIENCE**

#### **Graduate**

Robert Morris University Peoria Campus, Managing Diverse Organizations

Benedictine University, MBA and MSMOB, Team Building

Benedictine University, MBA and MSMOB, Strategic Management Capstone Millikin

University, MBA, Leading Organizations

#### **Undergraduate**

Robert Morris University, Traditional - Project Management, Operations Management, Human Resources Management (Peoria and Springfield)

Benedictine University, Traditional - American Government

- Developed new structure for course in American Government to take advantage of benefits of problem-based learning and lecture free environments, including adopting open source materials vs. textbook. Spring of 2015 this course is also designated as writing intensive meaning students will

write at least 12,000 words over the semester including segments that are peer reviewed as well as specific genre instruction in essays and research papers.

### **Benedictine University,**

Traditional - Organization Behavior

- Spring 2015 revised to incorporate a Global designation meaning one-third of the content focuses on diversity and consideration of global cultures and communities.

Adult - Organization Behavior

Adult - Emerging Issues in Collaboration at Work

- Designed online and blended courses in the Interdisciplinary Seminar Series in the category of Human Dignity/Common Good part of the new General Education curriculum.

### **Millikin University**

Adult - Organization Behavior

Adult - Organization Development and Change

- Designed a new required course in the PACE Organization Leadership Program at request of Millikin

## **EDUCATION**

PhD Organization Development, Benedictine University at Springfield

- Dissertation entitled Transformation in higher education: A case study of successful organization change and rebirth.
- Accredited by the Higher Learning Commission and a member of the North Central Association

M.S. Management and Organizational Behavior, Benedictine University at Springfield

B.A. Public Administration and Political Science, Drake University, Des Moines, Iowa

Human Development Counseling Graduate Course Work, University of Illinois at Springfield

# Juanita M. Morris, PhD

## EXECUTIVE OVERVIEW

An accomplished professional in higher education, working at both public and private as well as historically black colleges and universities and predominantly white higher education institutions with a foundation in research methodology and statistics. Spent time, guided by a distinguished professor, researching and examining state tax appropriations and funding for all public higher education institutions and examining the impact of economic recessions on state allocations. Generated millions in revenue through implementation of cost-saving metrics well as effective marketing and project managing, resulting in the establishment of necessary skills to successfully launch one company with three divisions. Through collaborations, the company has secured contracts with the City of Decatur, provided services for The Greater Decatur Chamber of Commerce and served on community committees for the Limitless Decatur Campaign, designed to impact the awareness and impact of change in Decatur, Illinois.

### Core Competencies

Research Methodology, Assessment & Data Analysis  
A Genuine Interest & Love for Connecting People to Work  
Understanding the Impact of Collaboration on Work Outcomes

Project Management  
Organizational Partnership Building  
Strong communication skills

### EDUCATION

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Doctor of Philosophy

Illinois State University

Educational Administration & Foundations

Research Methodology & Statistics

Center for Higher Education Finance: Grapevine

#### Dissertation Title

Trends and Relationships in Student Enrollment, State Support, Economic Recessions, and Student Aid in Higher Education: 1976-2003

Master of Science

Illinois State University

Higher Education Administration & Foundations

College Student Personnel

Bachelor of Arts

University of Illinois Springfield

Mathematical Sciences & Statistics

Associate of Arts

Benedictine University (Formerly Springfield College in Illinois)

### EMPLOYMENT

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J Morris Enterprises, LLC

President / CEO

Spring 2017 – Present

Decatur, IL



- Nature's Way Lawn Services [www.NaturesWayLawnServices.com](http://www.NaturesWayLawnServices.com)
- The Box – Decatur [www.TheBox-Decatur.com](http://www.TheBox-Decatur.com)
- 4M Educational Services
  - PackEd School Supplies [www.PackEdSchoolSupplies.com](http://www.PackEdSchoolSupplies.com)
  - Educational Programming
  - Research & Assessment Consulting Services [www.DrJuanitaMorris.com](http://www.DrJuanitaMorris.com)

#### Community

- Girls Who Code of Macon County
- Summer Math Academy [www.MDHEducationalFoundation.com](http://www.MDHEducationalFoundation.com)
- Girl Scouts of Central Illinois STEM Advisory Committee
- PLTI (Parent Leader Training Institute)

#### Millikin University Decatur, IL

Adjunct Professor

Fall 2017 – Present

- Business Communications
- University Success
- Team Dynamics

#### Jackson State University Jackson, MS

Director, Undergraduate Recruitment

Aug 2014 – Dec 2016

#### Enrollment Management

- Establish and implement a data-driven process for recruitment of a diverse first-time freshman class
- Oversee campus tours managing campus visits for more than 10K prospective students and chaperones
- Manage the coordination of all recruitment events on campus and at off-site locations
- Manage recruiters, establish territories and identify emerging recruitment markets
- Revise Undergraduate Recruitment office practices and procedures in accordance to university policy
- Coordinate the receipt and processing of more than 20K applications
- Chair recruitment committee for first-time freshmen that includes representatives from across the university
- Support efforts for recruitment of transfer students, readmit students, online students and graduate students to ensure the University's overall enrollment goals are achieved
- Develop and manage communications plan for recruitment of first-time freshmen
- Increase student participation in recruitment efforts through call campaigns and recruitment events
- Serve on grant-writing committee to increase access to higher education for low-income high-achieving students. Dual Enrollment Grant from US Department of Education has been awarded.

#### Partnerships

- Academic Colleges and Individual Programs
- University Undergraduate Studies
- University Communications, Marketing and Graphic Designers
- Financial Aid, Scholarship Coordinator and Registrar
- Special University Programs (Summer Bridge, Veterans Affairs, Army & Air Force ROTC, etc.)
- Student affairs & student organizations
- National Alumni Organization, Alumni Relations Office & Alumni Chapters
- External vendors and consultants
- Parents and families of prospective students
- High school administrators and instructors

#### One Year Impact

- Increased the number of first-time freshmen applicants by 36%
- Increased the number of first-time freshmen admits by 50%
- Increased University enrollment by 3.1%

- Increased the average ACT and GPA of applicants by refocusing recruitment efforts.
- Jackson State University has moved from the 8<sup>th</sup> largest historically black university to the 4<sup>th</sup> largest historically black university.

#### Budget Management

- Greater than million dollar operational recruitment budget
- Manage building renovation budget greater than one quarter-million dollars

#### Student Affairs

- Chair Student Affairs Search Committee
- Lead largest student organization through Undergraduate Recruitment – Blue Ambassadors
- Collaborate with University Housing on first-time freshmen residential life registration
- Collaborate with student affairs and parent association

Lane College  
Associate Vice President for Academic Affairs  
Aug 2011 – Aug 2014

Jackson, TN

#### Associate VP for Academic Affairs

- Oversee all planning and responsibilities for three-day New Student Orientation.
- Oversee all planning and responsibilities for Chair Freshmen Week.
- Partner with offices to ensure that student services are being addressed (Registrar & Academic Division Chairs).
- Provide academic guidance and schedule preparation to selected groups of students (athletes and new students).
- Chair Spring Finish Strong Campaign, which included campus-wide additional academic support activities and additional student activities.

#### Enrollment Management & Admissions

- Direct all activities for Enrollment Management and Admissions for the College's 16 academic programs supervising a staff ranging from 15 to 30, with the number increasing during special recruitment projects.
- Ensure that all applications are processed (5,000-10,000 per year), students are contacted and informed of outstanding information, facilitate the admissions process, and ensure that the needs of all new students, parents and families are met in a timely and courteous manner.
- Establish recruitment territories and manage travel for recruiters.
- Facilitate campus tours for groups and individuals.
- Oversee the preparation of promotional and marketing materials.
- Manage New Student Orientation Weekend.
- Stabilize and increase College's enrollment from a 25% decline fall 2012 to a 2.85% increase fall 2013. The fall 2013 experienced an increase in new students, an increase in returning student, an increase in transfer students and an increase in students seeking readmission to the institution.

#### First-Year Experience

- Direct all activities related to the first-year experience, including the Quality Enhancement Plan
- Monitor all first-year students' classroom attendance, midterm grades and class schedules
- Establish a connection with the first-year students, parents and family
- Created special programs and events for first-year students such as Butterfly Beauty and Male Institute (gender specific dialogue and discussion sessions)

#### Director, Institutional Self-Study /Accreditation Liaison (SACS)

- Coordinate the completion and submission of all requirements to the accrediting agency.
- Ensure that all preliminary and follow-up reports were submitted to the accrediting agency on time.
- Oversee the on-site visit for reaffirmation of accreditation (October 2013) including arrangements, materials, meetings, and any request. Lane College was reaffirmed by the SACSCOC for 10 years with NO recommendations or follow-up.

### Quality Enhancement Plan

- Oversee the development, obtaining institutional-wide input and feedback (including students, faculty, staff, and alumni) to demonstrate broad-based input, and presentation of the Quality Enhancement Plan entitled "GEMS: General Education Math Scholars" to the accreditation on-site review committee for approval.

### Accreditation Liaison

- Serve as the primary point of contact regarding all accreditation reports, documents and requests from the agency
- Respond to all inquiries and requests from the accrediting agencies

### Director, College-wide Assessment

- Implemented a revised College-wide assessment model
- Coordinate completion of all assessment reports (academic, administrative and support services)
- Serve as member of the Strategic Planning Committee
- Provide recommendations to budget allocations and academic programs based on assessment evaluation

### Mississippi Valley State University

Itta Bena, MS

#### Director, Office of Institutional Research & Effectiveness

#### Office of Institutional Research and Effectiveness

- Review and oversee project assignments associated with reaccreditation and reaffirmation
- Administer the evaluation process of university-wide faculty course evaluations for all courses
- Coordinate the submission of all state and federally required reports
- Analyze and present institutional data to enhance data-driven decisions
- Fulfill all requests and projects as assigned by the Provost's Office

### Southern Illinois University

Edwardsville, IL

#### Adjunct Faculty

Jan 2010 – Dec 2010

#### Instructional Services Department

- Maintain a full course load, consisting of four courses and approximately 100 students
- Teach Intermediate Algebra & other math courses as assigned
- Tutor student groups and provide one-on-one instruction
- Participate in departmental meetings and course content review and development

### University of Illinois

Urbana, IL

#### UPWARD BOUND COLLEGE PRE ACADEMY

Sum 2010

- Teach Calculus to Upward Bound / Bridge Students during the 2010 summer residential program
- Supervise two teacher assistants
- Design and develop calculus lesson plans for summer course, assign and grade homework,
- Work with students on developing and enhancing mathematical skills
- Participate in all administrative meetings, submit required weekly reports
- Mentor students and participate in extra-curricular activities with students

### Danville High School District 118

Danville, IL

#### Math Teacher

Aug 2007 – May 2009

- Teach full daily schedule of math courses (Algebra, Geometry, Business Math)
- Serve as methodologist on federally mandated high school restructuring committee
- Analyze and present assessment data to administration, faculty, and staff
- Serve on School Improvement Committee
- Evaluate Implementation of Small Learning Communities

# Julienne Shields, MBA

## EXECUTIVE OVERVIEW

### Core Competencies

Extensive meeting facilitation  
Human resource management  
Examining the impact of entrepreneurship on economic development  
Community Partnerships through entrepreneurship program  
New program development

Team Development  
Organizational and Team Training

### EDUCATION WORK EXPERIENCE

#### Millikin University

Director – Center for Entrepreneurship & Instructor of Entrepreneurship July 2015 - Present

- Manage Center Budget and Resources of \$400,000+
- Control Entrepreneurship curriculum for Major, Minor, and two distinct certificates in Arts Entrepreneurship & Entrepreneurship (Innovation)
- Recruit and Evaluate faculty and adjunct faculty
- Evaluate faculty and adjunct faculty
- Coordinate co-curricular activities for entrepreneurship across campus
- Facilitate and lead Teaching Entrepreneurship at Millikin faculty workshop series
- Fundraise with Alumni and Development office for the Center
- Grant Writing for community and industry-specific entrepreneurship programs
- Academic Advising Load of 25-35 students
- Liaise with Deans on the entrepreneurship courses, faculty and initiatives within their colleges
- Average teaching load of 2/2 in addition to all other activities

Instructor of Entrepreneurship Arts Entrepreneurship Program June 2013 – July 2015

#### COURSES TAUGHT

June 2013 – Present

ET390/AR390: Blue Connection Retail Art Gallery (Student-run Venture)  
ET380: Art of Entrepreneurship  
ET360: Topics in Entrepreneurship – Food and Beverage Industry  
ET383: Innovation Lab  
ET381: Entrepreneurship Practicum  
ET391: Blue Brew Coffee Shop (Student-run Venture)  
BU111: Team Dynamics  
HN206: Honors Seminar on Entrepreneurship

### EDUCATION BACKGROUND

Millikin University, Decatur  
M.B.A.

May 2013

University of Illinois, Urbana/Champaign  
B.A. Classics & History

December 1995

University of Illinois at Springfield  
Post Grad

Jan 1996 – May 1996

Certification: Microsoft Office User Specialist – Master Level Certification 2004

EXPERIENCE NOT IN EDUCATION

United States Association of Small Business and Entrepreneurship

INTERIM EXECUTIVE DIRECTOR

June 2018 – January 2019

Headquarters: University of Wisconsin-Whitewater

Highpoint Ventures, LLC - Lovington, IL

OWNER

May 2014 - present

- Owner and operator of a foundational Welsh pony farm breeding program.

Decatur Public Schools – Decatur, IL

EXTENDED LEARNING COORDINATOR

August 2009- July 2013

- Developed extended learning strategic plan for 20 schools (9,000+ students) and initiated an energetic presence in the community for out-of-school time learning initiatives
- Designed and implemented Camp Connections from 2011-2013 for a combined 2,300 campers in collaboration with 20+ non-profit and for-profit business partners
- Designed and implemented SMASH Camp for gifted and high-achieving middle school students in collaboration with Millikin University in 2012-2013
- Facilitated composition, won, and implemented a \$1.2 million 21<sup>st</sup> Century Community Learning Centers grant for four sites in Decatur
- Directly supervised eight summer program staff members collaborated with ten external hiring managers, who together hired more than 175 seasonal staff members and recruited 20+ volunteers.
- Coordinated collaborative curriculum initiatives with ten organizations in 2012:
  - Decatur Public Schools, Decatur Parks District, Millikin University, Macon County Conservation District, Richland Community College, Children's Museum of Illinois, YMCA, 4-H and U of I Extension, Boy Scouts, and Girl Scouts
- Administered \$1.3 million per year in state and federal grants for after-school academic programming
  - Managed seven site coordinators, three major vendors, and more than 40 paid after-school tutors
  - Promoted and developed innovative technology-focused programming with using Lego MindStorms, CAD, video production, Flip cameras, digital portfolios, etc.
  - Maintained regulatory documentation for state and federal grants/programs
- Garnered over \$40,000 in non-government funds and over \$350,000 of in-kind contributions
- Created new after school programs in 14 schools over 24 months by aligning community resources with federal grants

Millikin University – Center for Entrepreneurship – Decatur, IL

PROJECT COORDINATOR

Oct 2008- Sept 2009

- Coordinated the following Youth Entrepreneurship conferences
  - Attracting Students to Information Technology (April 2009) for 40 educators
  - iSMARTgirls Discovery Camp for 6<sup>th</sup>-8<sup>th</sup> grade girls (May 2009) for 60 students
  - CampCEO Business Camp for 9<sup>th</sup>-12<sup>th</sup> grade students (June 2009) for 20 students
- Utilized multiple channels to reach out to the broadest possible population of interest to each conference
- Coordinated local resources and organizations for continuing support and outreach

InVivo Ventures, LLC – Decatur, IL

PRINCIPAL

June 2008- April 2010

- Negotiated open source of technology intellectual property from joint venture with The University of Illinois

- Coordinated data analysis projects for the Education Coalition's Improvement Teams
- Facilitated Data Sharing pilot project among the Decatur Public Schools, the Boys & Girls Club and the Education Coalition
- Collaborated with community organizations including: Decatur Public Schools, Junior Achievement, Project Success, Big Brothers Big Sisters, Millikin University, and others

Open Integration Incorporated – Champaign, IL

DIRECTOR & OWNER

Oct 2005 – June 2008

- Managed technology company valued at \$6.3 million with 12 employees and four consultants
- Negotiated and administered all contracts with vendors, service providers, and clients
- Created marketing proposals and frameworks for collaboration
- Facilitated multi-disciplinary software development efforts
- Performed monthly financial reporting
- Provided strategic recommendations and counsel on critical business initiatives
- Strategically consulted with legal counsel, accounting resources and marketing support

Keane, Inc. – Bloomington, IL

RECRUITING SPECIALIST

Oct 2004 – Oct 2005

- Coordinated and executed target marketing for recruitment events in central Illinois, Dallas and Indianapolis
- Successfully hired 36 new employees with 0% turnover in 12 months

Nims Associates, Inc. – Decatur, IL

HR MANAGER

July 2003 – April 2004

- Primary HR contact for company of approximately 400 employees and subcontractors
- Assessed benefits and negotiated changes to medical, dental, and life insurance plans
- Coordinated annual employee handbook reviews (six-month, multi-dimensional projects involving over 80 discrete sections of the handbook)
- Revised numerous policies and procedures to both protect the company and exhibit respect for employees while communicating policy revisions
- Mediated legal employment issues between attorneys and managers on behalf of company

PROJECT COORDINATOR

July 2002 – July 2003

- Successfully coordinated and developed online employee benefits website from stakeholder interviews all the way through user-acceptance testing and implementation (including coding the site, layout of the site, creating useful images, coordinating with IT group, etc.)
- Successfully coordinated team effort to critique and overhaul HR benefit and information packets (including developing a unified look-and-feel based on the selected branding standards)

EMPLOYEE DEVELOPMENT ASSOCIATE

January 1999 - July 2002

- Educated new employees during multiple day orientation sessions on a variety of topics from history of the company, Open Book Management, Great Game of Business, expectations in the workplace, and many others
- Created on-line training activities for new hires to be used with new hires who were geographically unable to attend orientation the first week of employment

TECHNICAL RECRUITER – CHICAGO BRANCH

March 1997 – January 1999

- Developed recruiting policies and employee marketing plan for newly created branch
- Managed the recruiting budget for trade shows
- Held interviews and mentored new employees

Analysts International Corporation (AiC) – Bloomington, MN

RECRUITING MANAGER

July 1996 – March 1997

- Targeted recruitment for Minnesota clientele

- Successfully hired 8 new employees

Pro-Tech Search, Inc. – Chatham, IL  
RECRUITING SPECIALIST

January 1996 – July 1996

PROFESSIONAL MEMBERSHIPS

OpenEAI Software Foundation Member 2005 – 2012  
Board of Directors – Treasurer 2008 - 2010

USASBE

VICE-PRESIDENT & CHAIR OF CONFERENCE FOR 2018 CONFERENCE, HOLLYWOOD, CA 2017-2018  
ASSISTANT VICE-PRESIDENT OF OPERATIONS & FINANCE 2018-PRESENT

SOCIETY OF ARTS ENTREPRENEURSHIP EDUCATORS

GLOBAL CONSORTIUM FOR ENTREPRENEURSHIP CENTERS

COLEMAN FOUNDATION – COLEMAN FELLOWS PROGRAM RECIPIENT  
DIRECTOR OF MILLIKIN'S COLEMAN FELLOWS PROGRAM 2016-PRESENT

Decatur Herald & Review Business Journal features:

- January 2016: "Local resources abound for budding entrepreneurs"
- February 2016: "Motivation sets framework for entrepreneur's journey"
- March 2016: "Networking vital to growing your business"
- April 2016: "Startup Weekend puts ideas to the test"
- May 2016: "SCORE changing, expanding its outreach efforts"
- June 2016: "Don't underestimate the importance of timing"
- July 2016: "Lessons learned while visiting Japan"
- August 2016: "Libraries offer valuable business research tool"
- September 2016: "Performance Learning has far-reaching benefits"
- October 2016: "Alternative financing methods filling biz funding gap"
- November 2016: "Visiting professor to bring world of experience to Millikin"
- December 2016: "International trip expands students' comfort zones"
- January 2017: "Focus, not magic, is key to success"
- February 2017: "Entrepreneurial collisions bring ideas to life"
- March 2017: "Putting price on products not an easy task"
- April 2017: "Entrepreneurial spirit blossoms with spring events"
- May 2017: "Entrepreneurs can be their own worst enemy"
- May 2017: "SCORE a solid resource"
- June 2017: "Summer is time to reflect, improve"
- July 2017: "A trip to Italy with a purpose"
- August 2017: "There isn't an age limit on budding entrepreneurs"
- November 2017: "Gen Z appears poised to rekindle entrepreneurial spirit"
- December 2017: "Students share joys of entrepreneurship"

OTHER FUNDRAISING ACTIVITY

- 2017-2018 Coleman Fellowship Support Grant \$25,000
- 2016-2017 Coleman Fellowship Support Grant \$25,000
- 2016-2017 Coleman Foundation Entrepreneurship Support grant \$38,000
- 2016-2017 ADM Cares Grant \$37,000

- 2017-2018 ADM Cares Grant \$37,000
- 2016-2017 Lumpkin Family Foundation Food Innovation Grant \$25,000
- 2017-2018 Coleman Fellowship Support Grant \$25,000
- 2018-2019 Coleman Fellowship Support Grant \$25,000

#### PROFESSIONAL GROWTH ACTIVITIES

- 2013 Experiential Classroom, Gainesville, FL
- Summer 2015 Go Deep – Teaching Entrepreneurship, Calgary, Canada
- January 2015, SEE – Babson University
- June 2015, Entrepreneurship Forum, Mason City, IA
- August 2015, American Management Association, Vancouver, Canada
- October 2015, Global Consortium of Entrepreneurship Centers, Gainesville, FL
- October 2015, TEDx Normal, IL
- October 2015, Iowa Startup Accelerator LAUNCH Day event, Cedar Rapids, IA
- February 2016, Self-Employment in the Arts, Lisle, IL
- November 2016, Cleantech Startup Showcase, Chicago, IL
- January, 2017, USASBE Conference – Philadelphia, CA
- May 2017, Agile Training 1-day session – Decatur, IL
- May – June 2017, Italy Centro Studi Italiani – Urbania, Italy
- June 2017, Experts-in-Teams conference – Uppsala, Sweden
- June 2017, Agile Training with Scrum 2.5 day session – Decatur, IL

#### SEMINARS, TRAINING PROGRAMS, ETC., CONDUCTED FOR BUSINESS & INDUSTRY

- 2013 Summer Learning Conference, Decatur, IL (Richland Community College)
- 2014-2015: Summer Learning Experiences, Decatur, IL (Decatur Public Schools)
- 2016: Coordinated and sponsored 3<sup>rd</sup> Annual Society for Arts Entrepreneurship Education, Decatur, IL
- May 2018 – teachingentrepreneurship.org, “Ping Pong Challenge” workshop in their online webinar
- August 2018 – Facilitator for the Entrepreneurial Mindset Bootcamp, Rowan University Center for Innovation and Entrepreneurship Certificate program
- Summer 2018, Idea-to-Incubator 10-week program, weekly innovation sessions for participants and community members

#### PROFESSIONAL PRESENTATIONS, SPEECHES, ETC.

- January 2012 – Illinois State Board of Education, Chicago IL – Business Model Canvas in Extended Learning programs
- November 2013 – GCEC Arts Entrepreneurship with Andy Heise and Dave Burdick, Kansas City, MO
- January 2014 – USASBE panel presenter for Best Practices in Arts Entrepreneurship
- April – AAAE - Panel on Arts Entrepreneurship Education Pedagogy, Montreal, Canada
- May 2014 – Society of Arts Entrepreneurship Educators – Comparing Student-run Venture Pedagogy, Dallas, TX
- August 2014 – Coleman Foundation eSummit – Frameworks for Teaching Entrepreneurship, Chicago, IL
- February 2015 – Self-Employment in the Arts – Student-venture Presentation with Students, Chicago, IL
- February 2015 – MIFC Panel discussion on Performance Learning Pedagogy, Decatur, IL
- March 2015 – Coleman Coffee Cup Webinar – Frameworks for Teaching Entrepreneurship
- January 2015 – USASBE Experiential Exercises Track – Ridiculousness Exercise, Tampa, FL
- August 2015 – Coleman Foundation eSummit – Ridiculousness 2.0, Chicago, IL
- October 2015 – Society of Arts Entrepreneurship Educators, Panel Discussion on Student-ventures as Pedagogy, Columbus, OH
- October 2015 – ACBSP Regional Conference, Student Run Venture Pedagogy with RJ Podeschi, Tiffin, OH
- January 2016 – USASBE Experiential Exercises Track – Venture Balloons Exercise, San Diego, CA
- January 2018 – USASBE – “Providing Sustainable Mentorship”, Hollywood, CA
- January 2018 – USASBE – “Bridging the Gap Between Idea to Action”, Hollywood, CA

#### INSTITUTIONAL SERVICES PERFORMED

- Entrepreneurship Search Committee – Chair



- University Band Director Search Committee - Member
- Adjunct Training Seminar – Tabor School of Business
- Created and taught in the Teaching Entrepreneurship at Millikin Certificate program
- Advisor – Agile-for-Entrepreneurship Student Fellows
- Nyberg Committee on Leadership Programming for Oberhelmen Center for Performance Leadership
- Center for Entrepreneurship – Strategic Planning Retreat
- Alumni & Development Advancement trip to Kanazawa, Japan
- Tabor Dean Search Committee
- Center for Entrepreneurship – Strategic Planning Retreat
- Tabor School of Business – Strategic Planning Retreat
- Committee on Advising - Tabor School of Business

PROFESSIONALLY - RELATED COMMUNITY ACTIVITIES

- 2013-2016 Youth Leadership Institute: Facilitator - Leadership & Community Perspectives – 30-35 High School Juniors each year
- 2013-2014 – USASBE leadership for Arts SIG
- 2016 – Coordination and Hosting of the Society for Arts Entrepreneurship Education Conference
- 2017-2019: Co-Sponsor for Celebrating High School Innovators Program for the State of Illinois
- 2017 Power in Pumps speaker: “Women-owned entrepreneurs are a better ROI”
- 2018 Power in Pumps speaker: “Reducing Negativity – when to say No and when to say Not”

Decatur Area Education Coalition

Coordinating Committee 2012 – 2013

Decatur Day Care Center

Board Member at Large 2013 – 2017  
Treasurer 2014 – 2017

Business Development Resource Center

Steering Committee 2015 – 2017



## PROPOSED SCOPE OF WORK

The overall proposed scope of work would follow what has been outlined in the Request for quote.

### Overview

#### Strategic Planning Team & Effective Meeting Facilitation

- Pre-work & Preparation
- Research

#### Facilitation

##### Joint City Council / City Staff Meeting

- Produce alignment in establishing a partnership
- Identifying four (4) to six (6) key outcomes

##### Joint Follow-up City Council / City Staff Meeting

- Align results
- Prioritize emerging strategies

Ultimate strategy: support the City Council and City Staff in working together to identify a strategy to create a shared vision through the development of 4 to 6 key outcomes.

Participant	Activity	Location	Approximate Date	SC Time Estimate
SC, PT	1) A two-hour call to review our most recent strategy, new approach to create next strategy and refine/update quote if there is a material change to the plan.	Phone Call	Early-Mid May	2 hours
SC, PT	2) Two preparation calls for facilitation. In these calls we anticipate discussion of people process, approach and needs in the room as well as specific questions or pre-work needed by the facilitator.	Phone Call	Late May	4-6 hours
SC, CS, CC	3) The Strategic Consultant will lead a two facilitation of a discussion for City Staff and City Council to align the vision of how we should work together, the role of strategy and how we will work with the strategy over time, and the key outcome visions or "chapters" of discretionary work for city staff.	In Peoria	Early June	2 days plus travel
OT, PT	4) City staff will form outcomes teams which will engage key community constituents and internal staff to define the	Various	Mid June	Various

	challenges that impede those outcomes. Once defined, staff will offer possible measures and metrics to understand success in meeting these outcomes and up to three (3) strategies (work priorities) to best use staff time in pursuit of those outcomes.			
SC, PT	5) The Strategic Consultant will be given these documents for review and have a call with the strategic planning team to review contents and discuss a priority action process.	Phone Call	Late June	10 hours
SC, PT	6) The Strategic Consultant will then return to Peoria to facilitate a prioritization process with Staff and City Council.	In Peoria	Early June	1 day plus travel

## ALTERNATIVE TENDER TO PROPOSAL

4M Educational Services would ask that some consideration be given to two areas:

- Because of our proximity to Peoria, it would be our ask that may of the conference calls be held in person in Peoria at no additional expense.
- In activity four (4) outlined in the scope of work, 4M would ask to have some participation and active engagement with the outcomes teams at a constant per hour rate of \$200 and time allocation to be determined by Peoria. There is value in supporting the work of the outcomes teams as well as observations and impacts of outcome goals by key community constituents.

## PROPOSED WORK SCHEDULE & ESTIMATED COSTS

Estimated cost is based on \$200p/ hour. The cost per hour will cover all expenses for each line item indicated. 4M Educational Services also would recommend replacing current conference call meetings to be in person in Peoria for no additional cost or fees. Ultimately, the goal is to gain a better understanding the culture and the climate and to build relationships with the facilitation team to ensure the expected outcomes are met and reflective of the City Employees, City Council as well as the Peoria Strategy Team.

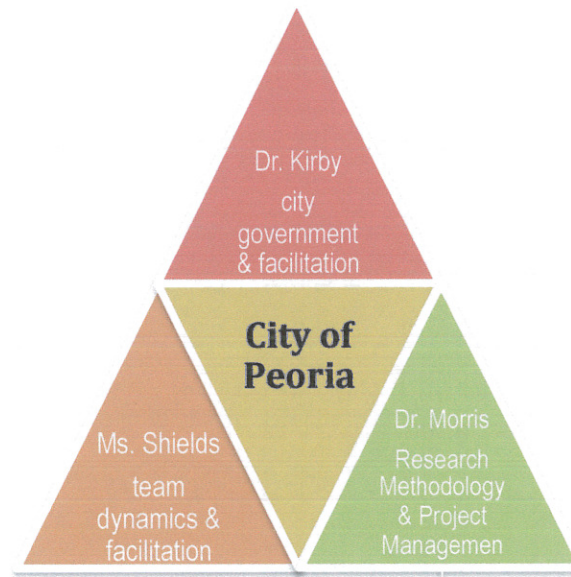
Participant	Activity	Location	Approximate Date	SC Time Estimate
	Consultant Pre-Work Could receive most recent strategy and documentation prior to call. To prepare for call.	E-mail	May 6 – 10	\$0
SC, PT	1) A two-hour call to review our most recent strategy, new approach to create next strategy and refine/update quote if there is a material change to the plan.	Phone Call Or In Peoria	May 14, 15 or 16	2 hours * \$200 p/ hour = \$400
	Consultant Work Review, and meet to discuss strategy. Prepare a draft of materials in preparation for late May facilitation sessions.	E-mail	May 21, 22, or 23	\$0

SC, PT	2) Two preparation calls for facilitation. In these calls we anticipate discussion of people process, approach and needs in the room as well as specific questions or pre-work needed by the facilitator.	Phone Call Or In Peoria	May 29 or 30	6 hours * 200 p/ hour = \$1200
	Consultant Work Consultants will need to work between meetings to ensure content, information and delivery will yield optimal outcomes for the two day meeting	In Decatur	June 5, 6	\$0
SC, CS, CC	3) The Strategic Consultant will lead a two day facilitation of a discussion for City Staff and City Council to align the vision of how we should work together, the role of strategy and how we will work with the strategy over time, and the key outcome visions or "chapters" of discretionary work for city staff.	In Peoria	June 10, 11	16 hours * \$200 p/ hour = \$3200 plus accommodations
OT, PT	4) City staff will form outcomes teams which will engage key community constituents and internal staff to define the challenges that impede those outcomes. Once defined, staff will offer possible measures and metrics to understand success in meeting these outcomes and up to three (3) strategies (work priorities) to best use staff time in pursuit of those outcomes.	Various	June 12, 13, 14, 17, 18, 19, 20	Various
SC, PT	5) The Strategic Consultant will be given these documents for review and have a call with the strategic planning team to review contents and discuss a priority action process.	Phone Call or In Peoria	June 28, 28	10 hours * \$200 = \$2000
SC, PT	6) The Strategic Consultant will then return to Peoria to facilitate a prioritization process with Staff and City Council.	In Peoria	July 9	8 hours * \$200 = \$1600
<b>Total Estimated Cost for a Team of 3 Consultants</b>				<b>\$8,400.00</b>

The days and times presented here are meant to be a guide. Arrangements will be made in consultation with Peoria to ensure the most optimal dates and times are identified.



## PREVIOUS EXPERIENCE



### Dr. Janet A. Kirby

Janet A. Kirby has been an internal and external consultant to organizations in the Public Sector for more than 20 years. Most recently she has served as developer and facilitator of a series of ten ward meetings that were run four times in the mayor's first term. These meetings included collaboration with the aldermen of each ward and other community partners. The purpose of the meetings was to fulfill a campaign promise to solicit first hand information from the members of each ward as to what they needed and wanted from their city government. The results were collected and made available on the city web site and were used as guidance to city departments for prioritizing projects. She has developed facilitated strategic planning for a number of other public and not-for-profit organizations, which are detailed in her resume. Ms. Kirby's extensive experience in public sector administration and leadership and extensive studies of organizations make her a great fit for the Peoria project.

### Completed Projects

- Facilitated City of Springfield Office of Mayor Community Meetings
- Facilitated City of Springfield Economic Development Strategic Planning Process

Reference: City of Springfield, Office of the Mayor  
Julia C. Frevert, Director of Communications  
800 E. Monroe, Room 300  
Springfield, Illinois 62701  
T: 217.789.2235  
C: 217.303.1507  
E: [Julia.Frevert@springfield.il.us](mailto:Julia.Frevert@springfield.il.us)

## **Dr. Juanita M. Morris**

Juanita M. Morris has spent more than 20 years in education and as a consultant to higher education organizations, both public and private. Part of her time in higher education has spent in university assessment as well as facilitating work with external agencies in ensuring institutions complete reaccreditation and reaffirmation of institutions and programs. Ms. Morris has extensive experience in research methodology and assessment and program evaluation. Ms. Morris also facilitates coursework and training sessions in team dynamics and team facilitation. Dr. Morris' extensive experience in research methods, combined with team dynamics and leadership in public organizations make her an excellent fit in meeting the goals for the Peoria project.

### **Completed Projects**

- Ameren Illinois Feasibility Study (Illinois)
- Team Dynamics Faculty @ Millikin University (Illinois)
- Institutional Reaffirmation & Accreditation @ Lane College (Tennessee)
- Institutional Assessment & Evaluation @ MS Valley State University (Mississippi)
- Consultant: Reaffirmation & Accreditation @ Jarvis Christian College (Texas)

Reference: Ameren Illinois, Office of the Division Director  
Ruth Anderson, Admin Asst Confidential  
2460 N. Jasper St.  
Decatur, IL 62526  
T: 217.474.6531  
C: 217.358.0454  
E: [RAnderson@ameren.com](mailto:RAnderson@ameren.com)

## **Julienne Shields**

Accomplished professional with experience in academia as well as business creation and management. Exceptional facilitator and communicator with the ability to see and understand the overlapping impacts of policy and practice on economic development, business creation and individuals and communities. Skilled at understanding group and team dynamics and objectively guiding the conversations to and through differing perspectives.

### **Completed Projects**

- Interim Executive Director at University of Wisconsin Whitewater of USASBE
- Ameren Illinois Feasibility Study (Illinois)
- Recruit and train adjunct faculty
- Develop and coursework and curriculum for Center for Entrepreneurship

Reference: Past President of US Association of Small Business & Entrepreneurship  
Dr. Mark T. Schenkel  
Professor of Entrepreneurship  
Jack C. Massey College of Business  
Belmont University  
C: 513.470.6669  
T: 615.460.5474  
E: [mark.schenkel@belmont.edu](mailto:mark.schenkel@belmont.edu)



4M Educational Services is committed to ensuring that exceptional consulting is delivered to the City of Peoria. The team that has been assembled to work with Peoria on reviewing and updating the City Strategy and aligning it to the biennial budget process is more than equipped to serve as a neutral party and to facilitate and drive a highly collaborative result that focuses completely on expected, anticipated and desired outcomes. We are equipped academically and prepared experientially to offer general guidance in the process as well as own the delivery of facilitated meetings including both City Council and City Staff. Our delivery will be unlike any the City Council and City Staff has experienced and will be designed to meet the unique needs of Peoria, Illinois.

It is our hope that this application has demonstrated the expected qualifications of:

- Meeting Facilitation
- Team Alignment
- Strategic Planning / Strategic Design
- Municipal Strategies

Each of which the team has not only studied, but also applied in multiple ways across diverse platforms. From conducting strategic planning sessions with city government, to building a team of employees generate record enrollment, which incorporates strategic planning for a project as well as for an institution, to managing a Director level position at two universities simultaneously while focusing on the impact of entrepreneurship on economic development.

# CITY OF PEORIA BID PROPOSAL

The executing of this form certifies understanding and compliance with the total bid/proposal package.

BID/PROPOSAL SUBMITTED BY:

J Morris Enterprises, LLC # \_\_\_\_\_

Company Number d/b/a 4M Educational Peoria EEO Certificate of Compliance

Address 1210 S. Jasper St

City Decatur State IL Zip 62521 Daytime Telephone # (217) 474-7300

After Hour Telephone # (217) 474-7300 Contact Person (Please print or type) Juanita M. MORRIS, PhD

Name of Authorized Agent or Officer Juanita M. Morris Title President/CEO

Signature of Authorized Agent or Officer Juanita M. Morris

Date April 25, 2019

What is this?

PLEASE MARK ENVELOPE: PROPOSAL # 20-19





# Illinois Department of Transportation

Office of Business & Workforce Diversity  
2300 South Dirksen Parkway / Springfield, Illinois 62764

October 25, 2018

## CERTIFIED-RETURN RECEIPT REQUESTED

Juanita M. Morris  
J. Morris Enterprises, LLC  
1210 S. Jasper St.  
Decatur, IL 62521

Dear Juanita M. Morris:

The Illinois Department of Transportation (IDOT), your host agency, is pleased to notify you that your firm has met the requirements for Disadvantaged Business Enterprise (DBE) program certification in accordance with the governing federal regulations, 49 CFR part 26.

This certification allows your firm to participate as a DBE in the Illinois Unified Certification Program (IL UCP). The participating agencies include the Illinois Department of Transportation, the City of Chicago, the Chicago Transit Authority, Metra, and Pace.

Your certification is approved commencing on **October 1, 2018**. To remain certified with the IL UCP you must submit a *No Change Affidavit* each year. Notification will be sent to you sixty (60) days prior to the anniversary date of your certification. It is your responsibility to ensure that your certification is kept current by submitting the required information in a timely manner. Failure to provide this information is a ground for removal of certification based on failure to cooperate pursuant to 49 CFR 26.109(c).

If there is any change in circumstances that affects your ability to meet size, disadvantaged status, ownership, or control requirements or any material change in the information provided in your application, you must provide written notification to this agency within thirty (30) days of the occurrence of the change. Failure to provide this information is a ground for removal of certification pursuant to 49 CFR 26.83(i).

Your firm's name will appear in the IL UCP DBE Directory in the following area(s) of specialty:

MANAGERIAL TRAINING  
EDUCATIONAL AND PROFESSIONAL DEVELOPMENT TRAINING  
RESEARCH  
MISC: DIRT & GROUND MAINTENANCE  
MISC: CATERING  
MISC: CONFERENCE ROOM RENTAL  
MISC: PUBLIC INVOLVEMENT  
MISC: BUSINESS ANALYSIS

This Directory is used by prime contractors/consultants, as well as other agencies, to solicit participation of DBE firms. The Directory can be accessed on the Internet at <http://www.dot.state.il.us/ucp/ucp.html>.

Your participation on contracts will only be credited toward DBE contract goals when you perform in your firm's approved area(s) of specialty. Credit for participation in an area outside your specialty requires prior approval (verification of resources, expertise, and corresponding support documentation, etc.).

**Please note:**

- This certification does not attest to your firm's abilities to perform in the approved work category(ies).
- Your certification may be revoked if your firm is found to be involved in bidding or contractual irregularities or has violated DBE program regulations pursuant to 49 CFR Part 26.107.
- For work to count toward a DBE contract goal, the DBE firm must perform a "commercially useful function" pursuant to 49 CFR Part 26.55. A DBE is considered to perform a commercially useful function when it is responsible for execution of a distinct element of the work of a contract and carrying out its responsibilities by actually performing, managing, and supervising the work involved.
- Firms seeking work with IDOT as a prime or subconsultant in specialized engineering categories must be prequalified by IDOT's Bureau of Design and Environment.
- Firms seeking work with IDOT as a prime construction contractor must be prequalified by IDOT's Bureau of Construction.

Please direct all inquiries and any questions to this agency at (217) 782-5490.

Sincerely,



Debra A. Clark, Bureau Chief  
Bureau of Small Business Enterprises

Enclosure



# Illinois Department of Transportation

## J. Morris Enterprises, LLC

is hereby certified as a

### **Disadvantaged Business Enterprise**

This certificate is valid under current firm ownership and operational control only and supersedes any authorization or listing previously issued.

Randall S. Blankenhorn

Secretary

Illinois Department of Transportation

Pamela R. Simon

Director

Office of Business & Workforce Diversity

Effective the 1<sup>st</sup> day of October 2018