

# Planning, Inc.

Training • Leadership • Security

Service Disabled Veteran Owned  
www.planprograms.com



## CAPABILITIES STATEMENT Leadership & Development

### I. Introduction

Planning, Inc. is a minority-owned, service-disabled veteran-owned small business specializing in human resource consultation, training, security services, and payroll delivery. We have been in business since 1982, providing education to U.S. government agency employees on federal retirement benefits, financial and estate planning, health and wellness, transition planning, leadership development training, and succession planning. Twelve years ago, we expanded our scope of instruction to encompass leadership development training, executive development training and succession planning. We strengthened our expertise in these areas by entering into strategic alliances with organizations and independent contractors who are experts at delivering this type of instruction.

On January 1st, 2023, The U.S. Small Business Administration Certified Planning, Inc. As a Service-Disabled Veteran Owned Small Business. An SDVOSB certification allows the government agency the opportunity to award Planning, Inc. sole-source and set-aside contracts across the federal government.

### II. Offered Services

#### Leadership Seminars:

Our seminars are conducted by seasoned professionals and organizations skilled in working with the government and private sector delivering customized or off-the-shelf training. The length of our seminars can vary by topic and/or be grouped together in Half or Full Day Programs. Our seminars are designed around the following modules:

- Five-Day Executive Development Program
- Five-Day Career Transition Program
- Five-Day Decision Making and Problem Solving
- Three-Day Programs
  - HR for Supervisors and Managers
  - Program Management Skills Training
  - Succession Planning
- Two-Day Programs
  - Building High-Performance Teams
  - Driving Results and Measuring Performance
  - Emotional Intelligence
  - Leading Change

- One-Day Programs
  - Strategic and Systems Thinking
  - Problem Solving and Decision Making
  - Employee Engagement
  - Critical Thinking
  - Effective Communication
  - Managing Difficult Conversations
  - Succession Planning

Seminar Topics:

Seminars cover the following subject matters:

Executive Education – This consists of executive education, facilitation and related decision support services to organizations engaged in leadership development.

Executive Coaching – We facilitate learning and behavioral results for clients by enhancing their awareness of their own strengths and weaknesses, the needs of the organization and their ability to establish and sustain collaborative relationships and manage progress and accountability.

Leadership Assessment – This identifies leadership gaps and strengths and focuses training initiatives on developing strengths and filling in gaps.

Succession Planning – We provide a nationally recognized faculty of Human Capital Management and Leadership Succession Planning experts to assist clients with the identification, development and training of “next generation leaders.”

**III. Address, Contact and Profile Information**

Virginia Office

7010 Little River Tpk. - Suite 140  
 Annandale, VA 22003  
 Phone: 703-256-4220  
 Fax: 703-992-9822

Texas Office

207 Mandalay Canal  
 Irving, TX 75039  
 Phone: 469-567-0923  
 Fax: 469-893-1798

Website: [www.planprograms.com](http://www.planprograms.com)

POC: Stacie Allen, Director, Training Programs – [stacie@planprograms.com](mailto:stacie@planprograms.com)  
 Brenda Martha, Deputy Director, Training Programs – [brenda@planprograms.com](mailto:brenda@planprograms.com)  
 Albert C. Zapanta, President/CEO – [zapantaz@planprograms.com](mailto:zapantaz@planprograms.com)

<b><u>Business Size</u></b>	<b><u>Business Type</u></b>
Small/<\$7.0M	Corporate Entity (not tax-exempt) Service-Disabled, Veteran-Owned Small Business
NAICS Codes:	611430, 541611, 541612, 541690, 611710, 611699
GSA MAS:	47QRAA24D00DB (Expiration September 5, 2029) Maximum Ordering Threshold (\$1,000,000) Federal Discount: .05% if paid within ten (10) days of invoice date Schedule Related Fees: .0075% (included in cost of seminar)
EIN:	52-2254450
DUNS:	196085997
UEI:	V1L2KFHCLSJ4
SAM:	Active - Valid through August 28, 2025