

PROPOSAL

Altadena Library District

Professional Development Consultation Services

RFP

Due: Tuesday, September 26, 2023

5:00 p.m. PT

SUBMITTED BY:

MELISSA ASHER

Sr. Practice Leader, Products and Services

CPS HR Consulting
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Your Path to Performance

a. Cover Letter

September 26, 2023

Nikki Winslow, District Director
Altadena Libraries
600 E. Mariposa Street
Altadena, California 91001

Subject: RFP Professional Development Consultation Services

Submitted via upload to: <https://www.bidnetdirect.com/california/ald>

CPS HR Consulting (CPS HR) has reviewed the RFP for Professional Development Consultation Services for the Altadena Library District (District) and we understand the requirements and services requested. We are pleased to have the opportunity to submit a proposal to the District for these services to develop and deliver training courses, and provide coaching services to support the professional development of the District's employees.

CPS HR has been assisting organizations with their talent management needs for over 35 years. We have unique expertise in delivering HR management and consulting services, training and development, and assessment services to government agencies throughout North America.

CPS HR is a Joint Powers Authority public agency, providing human resources consulting services to other public agencies and non-profit organizations across the United States.

With a rich history of providing high-quality, innovative solutions that positively impact public sector agencies and the clients they serve, we are able to respond to our client agencies quickly with solutions that meet their needs today as well as into the future. This is especially evident in today's environment of near constant change, shrinking resources, and the need to be creative in problem solving.

The strengths of CPS HR include our approach focused on implementation or application in the workplace, our flexibility and adaptability, and the experience and capabilities of our team. We have done this type of work for countless agencies, including special districts, we can provide high-quality, cost-effective services.

Terms and Conditions

Our CPS HR Contracts Manager and Insurance Broker have reviewed the Altadena Library District Professional Services Agreement. We can accept and adhere to the terms and conditions prescribed with the requested addition of our Pre-Existing IP language to the following section and two notations.

Requested Addition.

Section 11. Work Product and Intellectual Property Rights. *“Notwithstanding the foregoing, Consultant retains ownership of any and all of its intellectual property rights that existed prior to the Effective Date including, but not limited to, all methods, concepts, designs, reports, programs, and templates as well as all training materials, testing or assessment products, survey content and copyrightable works. To the extent that Consultant incorporates Pre-existing Work into a derivative work for District, Consultant will retain ownership of such derivative work. Apart from the above, any other work product, created exclusively for District with funds provided under this Agreement, shall be considered works made for hire and shall be owned by District.”*

Insurance Notations.

1. CPS HR does not own any automobiles.
2. Our self-insured retention is \$50,000.

Again, thank you for the opportunity to be considered for this engagement. Should you have any questions about this quotation or the services offered, please feel free to contact our proposed Project Manager, ***Karen Evans, at (916) 471-3342 or via email at kevans@cpshr.us***.

I am duly authorized to contractually bind our organization.

Sincerely,



Melissa Asher
Senior Practice Leader, Products and Services
masher@cpshr.us

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a. Section I – Experience

About CPS HR Consulting

ORGANIZATION IDENTIFICATION INFORMATION	
Legal Name and DBA	Cooperative Personnel Services dba CPS HR Consulting
Main Office	2450 Del Paso Road, Suite 220, Sacramento, CA 95834 *Primary location from which services are conducted
Regional Offices	100 Congress Avenue, Suite 2000, Austin, TX 78701 4 West Dry Creek Circle, Suite 100, Littleton, CO 80120 1968 S. Coast Hwy # 961, Laguna Beach, CA 92651
Type of Organization	Joint Powers Authority (JPA – Public Agency)
Years in Business	Established 1985
Website	www.cpshr.us
POINTS OF CONTACT	
Proposal Content and RFP Process	Karen Evans, Account/Project Manager; (916) 471-3341; kevens@cpshr.us
Authorized Contracts Representative	Melissa Asher, Senior Practice Leader, Products and Services; (916) 471-3358; masher@cpshr.us

CPS HR Consulting (CPS HR) has been assisting organizations with their talent management needs **for over 35 years. Additionally, we have regularly and continuously been engaged in the business of providing training, coaching, and organizational development services for more than 18 years.**

We have unique expertise in delivering HR management and consulting services, employment testing, and assessment services to government agencies throughout North America. **We operate a full-service training center offering over 150 courses tailored to the public sector. While our offices are located in Sacramento, California.**

We have an ethical, established and solid reputation delivering Professional Development Services. CPS HR does not have any disciplinary actions, administrative proceedings, malpractice claims or other like proceedings against our firm or any of our personnel relating to our services as Professional Development Services, whether current, pending, or occurring in the last five (5) years. Additionally, CPS HR is not currently involved in or affiliated with any entity or other consultants that might present a conflict of interest. Therefore, there are no conditions that would cause any significant and adverse impact on our ability to perform services for the District.

CPS HR's core competency is its knowledge of and expertise in the public sector. As a public agency, we understand the challenges and issues facing our client base. As a self-supporting public entity, we also understand the need for innovative yet practical results. CPS HR can provide expertise that is unique because we share with our clients a common perspective. There is no competitor in the industry that can make this claim.

We are recognized and regarded in the public sector for providing objective and impactful skill development and training. With a focus on local and state government, we speak the public sector vocabulary and focus on transference of learning to the job. In addition, our training services focus on working with teams and individuals to increase organizational effectiveness by establishing the framework and a culture of accountability to increase business performance.

CPS HR offers clients a comprehensive range of competitively priced services, all of which can be customized to meet your organization's specific needs. We are committed to supporting and developing strategic organizational leadership and human resource management in the public sector.

With over 100 full-time employees as well as 200+ project consultants and technical experts nationwide, CPS HR delivers breakthrough solutions that help public sector organizations impact the communities they serve. CPS HR has worked with more than 1,200 government and public/non-profit clients throughout the United States and Canada. Our headquarters are located in Sacramento, California. We have regional offices in Texas, Colorado, and Southern California.

For purposes of this RFP, our main office in Sacramento will serve as the primary location from which services are conducted.

Consulting Services

CPS HR believes in an integrated, systems-based approach to talent management and provides consulting in all the following key areas listed.

CPS HR CONSULTING SERVICES

ORGANIZATIONAL STRATEGY

- Workforce & Succession Planning
- Organizational Assessment
- Organizational Redesign and Re-Engineering
- Performance Management
- Employee Engagement
- Change Management
- Diversity, Equity & Inclusion

TESTING, RECRUITMENT & SELECTION

- Job Analysis
- Assessment Center Services
- Executive Search
- Recruitment Solutions
- Test Development*
- Test Administration*

*(for employment and licensing certification)

CLASSIFICATION AND COMPENSATION

- Classification
- Compensation

GENERAL HR SERVICES

- HR Outsourcing
- Complaint Investigations

TRAINING AND DEVELOPMENT

- Training Courses & Programs
- Executive Coaching
- Accelerated Leader 360° Assessment™
- Leadership Development

Qualifications and Experience

Our Commitment to You

CPS HR's services will exceed the requirements of the District because our wide range of training expertise will enable the District to partner with us to deliver the full complement of requested services. With over 75 consultants/instructors/facilitators, we are able to fulfill needs on a continual and timely basis with staff who specialize in working with public sector organizations.

CPS HR will respond promptly to the District's requests for training and coaching. We are close and readily available to meet, learn your desired outcomes, assess level and needs of target participants, and deliver services that exceed your expectations. Timetables will be established and met. Relevant evaluation data or follow up assessments or reports can be provided if required.

Our highly qualified instructors/coaches have been chosen for their subject matter expertise, passion for training, and effectiveness in adult learning transfer and retention. ***CPS HR has been, and is regularly and continuously engaged, in the business of providing professional development services since 2004.***

- CPS HR has experience working with a diverse student/experience base with persons of various educational, generational, and multicultural backgrounds.
- Our staff experience is focused on serving the training needs of public sector clients. As a public agency ourselves, we understand the training and organizational challenges agencies face, especially working in a union and Civil Service environment.
- CPS HR personnel have the technical knowledge and the classroom management skills to handle logistical and behavioral situations as they arise.
- Our talented team of instructors has expertise in a wide variety of areas and the majority have more than 15 years of experience as instructors and facilitators.

Over the last three years, we have served on average 30,000 students per year, delivered more than 1,000 training courses (across 14-categories) virtually, and at client sites and served 70+ clients annually.

Why Choose CPS HR?

We believe the advantages of using our expertise include:

- **A California-based public agency.** As a self-supporting public agency, a Joint Powers Authority (JPA), we have a good understanding of your challenges and needs. CPS HR has been helping public agencies, non-profits and professional associations meet their human resource needs since 1985.
- **A trusted training resource for public agency employees.** We provide both training for cities, counties, and special districts throughout California virtually and in our Sacramento Training Center. CPS HR instructors are knowledgeable, experienced trainers and our courses are focused on the skills and knowledge that employees need to succeed in today's public-sector workplace.

We also provide customized training to individual agencies. Once the curriculum and learning objectives are developed, our qualified trainers provide instruction on-site or remotely for the agency's employees.

- **Depth of training and development experience on diverse topics for public sector clients and our ability to customize our process to fit your needs.** CPS HR has been establishing development program options for client initiatives; sourcing trainers; coaching leaders; stewarding training/development efforts; and coordinating programs for over 18 years.
- **An excellent reputation earned by a high level of client satisfaction and our list of returning clients who seek our services for multiple engagements.** Our client satisfaction training evaluation rating averages 4.7 on a scale of 1 - 5, with 5 being the highest.

Certified Instructors/Consultants

CPS HR's team of instructors and facilitators possess several training related certifications that are used in our training courses as appropriate. Certifications include:

- DiSC
- StrengthsFinder 2.0
- MBTI
- Elevations Career Assessment
- Strong Inventory
- Franklin Covey
- Thomas Kilmann
- Senior Professional in Human Resources
- International Coaching Federation
- Kaleidoscope Leadership Skills Inventory
- Leadership Practices Inventory (360 Assessment)
- Advanced degrees (master's Level and Ph.D.) in social science, communication, organizational development, psychology, and human resources



- Communication and Collaboration
- Data and Analytics
- HR Practices, Policies, Compliance
- Leadership, Managerial, Supervisory Development
- Mandated Training
- Math, Budgeting, and Statistics
- Personal Development

WHAT DOES CPS HR TRAINING COVER?

WITH OVER 90 INSTRUCTORS WITH AN AVERAGE OF 25 YEARS OF EXPERIENCE, TRAINING INCLUDES THE SURROUNDING TOPICS

- Presentation, Instruction, and Facilitation
- Relationship and Behavioral Development
- Remote Staff Management, Collaboration, Productivity
- Risk Management
- Team Development
- Technology Training
- Writing Skills

COURSE EVALUATION FEEDBACK

THE FOLLOWING ARE STUDENT AVERAGES BASED ON A FIVE POINT SCALE WITH HIGHER AVERAGES REFLECTING MORE AGREEMENT.

Practical Examples were presented.	★★★★★	4.72
The instructor was knowledgeable.	★★★★★	4.84
The instructor was open to questions.	★★★★★	4.87
The instructor engaged me in learning the material virtually.	★★★★★	4.73
The instructor was well-prepared and organized for the virtual class.	★★★★★	4.79
Overall rating of the virtual class experience.	★★★★★	4.70

11,293 STUDENTS PROVIDED FEEDBACK ON THE QUALITY AND CONTENT OF THE CPS HR TRAINING COURSES ATTENDED FROM JANUARY TO DECEMBER 2021.

HERE IS WHAT WE LEARNED.



References

Following are client references for recent work performed relevant to the Scope of Work as outlined in the District's RFP.

Client Name: City of Sacramento

Address: 915 I St., Sacramento, CA 95814

Project Location: Sacramento, CA

Project Description: CPS HR is engaged with the City of Sacramento to deliver all staff and leadership training. This is a multi-year agreement beginning in January 2022 after a successful pilot program in 2021. More than 50 courses are offered to City employees. A sample of courses include Discovering and Working with Your Talents and Strengths, Coaching for Performance, Managing Your Time Wisely, Emotional Intelligence, Project Management, Introduction to Analytical Staffwork, Public Speaking, Interviewing Skills, Bridging the Technological Gap of Analytical Work, and many more.

Project Dates: January 2022 - Current

Client Contact/PM: Dave Newman, (916) 808-8954; dnewman@cityofsacramento.org

Client Name: City of Pasadena

Address: 100 North Garfield Ave., Pasadena CA 91101

Project Location: Pasadena, CA

Project Description: CPS HR been providing soft skills training courses across a wide range of topics since 2014 for the City. Courses have included: Cost Benefit Analysis, Grammar, Editing and Proofreading, Introduction to Analytical Staffwork, Completed Staffwork, Writing Skills for Analysts, Creating Accountability in the Workplace, Problem Solving and Decision-Making, Coaching as a Management Tool, Empowerment and Delegation, Analytical Skills, Lead person Workshop, Stress Management, and Technical/Technology training.

Project Dates: 2014 - Current

Client Contact/PM: Mo Sorcini, (626) 744-4215; msorcini@cityofpasadena.net

Client Name: Sacramento Housing Redevelopment Agency (SHRA)

Address: 630 I St., Sacramento CA 95814

Project Location: Sacramento, CA

Project Description: CPS HR has been working with SHRA since 2016 on a variety of initiatives including coaching emerging leaders, leadership and supervisory skills development, training on customer service for the call center and agency-wide as well as staff training. Courses have included: Communication Skills, the Performance Management Cycle, Motivation, Team Leadership, Project Management, Emotional Intelligence, Interviewing Skills, Lean Processes, Presentation Basics, and customized Customer Service class.

Project Dates: January 2016 – Current

Client Contact/PM: Tracy Knighton, HR Manager, tknighton@shra.org, (916) 440-1359

Client Name: California Department of Occupational Health and Safety (DOSH)

Address: 2424 Arden Way Ste 495, Sacramento, CA 95825

Project Location: Sacramento, CA

Project Description: CPS HR was engaged by the Department of Industrial Relations, Department of Occupational Health and Safety (DOSH) to provide leadership coaching to a group of 15-managers and senior leaders within the organization. A variety of assessment instruments were used including: the Leadership Practices Inventory (LPI) 360 assessment, the Myers-Briggs Type Indicator (MBTI), the DISC, Clifton StrengthsFinder, and CI-Q (Conversational Intelligence).

Project Dates: 2021 – 2022

Client Contact/PM: Jeff Killip, Jkillip@dir.ca.gov

Client Name: Regional SAN and SacSewer District (SacSewer)

Address: 10060 Goethe Rd, Sacramento, CA 95827

Project Location: Sacramento, CA

Project Description: CPS HR is engaged to provide general coaching services to managers and supervisors at the agency. Several types of assessments have been employed.

Project Dates: 2021 - current

Client Contact/PM: Rich Ambreu, abreur@sacsewer.com

Coaching Client Endorsements

The following are comments from some of our coaching clients. Names have been withheld to honor confidentiality and could be made available if requested on an individual basis.

“Your coaching talent has positively impacted me as well as many of our managers. Every day presents an opportunity for me to improve my leadership skills, and your careful coaching has built my confidence in interacting with staff and in my ability to lead a challenging group of people.”

“I was never really taught specific management skills. Your Executive Coaching not only gave me the skills I needed, I also found I was more organized and more confident among my staff members. Thank you so much!”

“As a result of your Executive Coaching services, I positively view every day as an opportunity to improve my leadership skills. Your work with my executive team was extremely valuable, and your coaching has equipped me with practical tools I can apply on a regular basis.”

“I am writing this several weeks past the completion of our sessions, and I want to let to know our work together has in no way stopped. Success is showing in a much broader way than I had hoped for. The clarity of your guidance and the techniques you taught me continue. My career has taken a big leap with your skillful guidance. Thank you very much.”

b. Section II – Personnel

Key Personnel

Account/Project Manager

We have selected **Ms. Karen Evans** to be the Project Manager for this assignment because of the strong project management skills and depth of experience with work of this nature that she possesses. She will serve as the main point of contact for the District coordinating all aspects of the project including the project staff, finalizing project plans and deliverables, organizing and securing resources, managing communications, monitoring project progress, resolving any problems, and ensure timely and successful completion of the engagement.

Project Consultants

Ms. Evans will be joined by the project team members listed below to include their role and responsibility. A detailed résumé follows for our Project Manager. Brief bios are provided for our instructors/consultants.

Project Team Organizational Chart

Project Team Roles and Responsibilities

Team Member	Role/Responsibility
Karen Evans, Training and Development Manager	Account Representative, Project Manager - Project management; Task assignment; Deliverable review; Reporting; Invoicing
Baljit Hundal	Instructor - Leadership Development, Communication Skills, Conflict Resolution, Performance Management
Danyelle Diaz	Instructor - Leadership Development, Communication Skills, Conflict Resolution
Gil Morales	Instructor - Customer Service, De-escalation, Conflict Resolution
Jennifer Houston	Instructor - HR Management
Norm Lefmann	Instructor - Risk Management
Yolanda Underwood	Instructor - Leadership Development
Amy Stewart	Coach
Chaim Eyal	Coach
Lisa Bishop	Coach
Nicole Welch	Coach, Instructor - Leadership Development
Michael David	eLearning

Staff Availability

Team members will be available throughout the duration of the project and will be able to commence work upon completion of a fully executed contract. For coaching, the method used for the delivery of services can be in-person or virtual, as mutually agreed upon with the District and participants, and conducted based on each participant's availability during regular business hours. If, for any reason, substitution of a key person becomes necessary, we shall provide advanced written notification of the substitution to the District. No subcontractors will be used for this project.

Services will be conducted from our Primary Office location at 2450 Del Paso Rd. in Sacramento, California.

Project Manager Résumé

Account Manager/Project Manager

Karen Evans, Ph.D., Training and Development Manager, Project Manager

Dr. Evans is the Training and Development Manager for CPS HR Consulting. She has more than 25 years of experience in education as an administrator and instructor. She has in-depth experience in executive level management, operations and sustainability for multi-modal delivery (online, blended, social, and mobile), curriculum and program development and deployment, assessment of student learning outcomes, faculty development, project management, strategic planning, organizational change and change management, conflict resolution, budgeting and forecasting, contract negotiation, accreditation, and compliance.

Employment History

- Training and Development Manager, CPS HR Consulting
- Associate Provost, Curriculum, Instruction, and Educational Technology, Carrington College Group, Sacramento, CA
- Senior Director, Curriculum Development and Academic Technology, DeVry Education Group, Chicago, IL
- Dean, School of Legal Studies, Kaplan University, Chicago, IL
- Executive Director, Curriculum, Kaplan Legal Education, Chicago, IL

Professional Experience

- Management and leadership of Carrington College curriculum development, instructional design, innovation, and educational technology.
- Lead national program deans and collaborate with campus academic teams to align and standardize curriculum and operations for hybrid and web-enhanced delivery.

- Oversight of faculty development, training, and records management. Direct Reports: National Program Deans, Online Program Dean (Medical Billing and Coding), and Senior Instructional Designer.
- Management and leadership of the DeVry Education Group division responsible for curriculum development, course design, innovation, and educational technology for the DeVry family of institutions online and blended curriculum.
- Collaborate and liaise across the institutions and functional areas in the areas of curriculum and program development, student persistence, retention, and attrition.
- Provided academic leadership to the School of Legal Studies for Kaplan University. The School of Legal Studies was comprised of ~4,000 full and part-time students across ten programs as well as 300+ adjunct and full-time faculty managed by six academic department chairs.
- Collaboration with ground campuses and learning centers to align and standardize curriculum and operations.
- Collaboration with ground campuses to align and standardize curriculum of joint programs.
- Collaboration across Kaplan units offering “legal” content to develop and deliver academic and professional development programs nationally and internationally.
- Developed and administered the annual budget for the School of Legal Studies. Direct reports: Assistant Dean of Faculty and Assistant Dean of Curriculum.
- Development and presentation of new program proposals including: market research, financial analysis, competitive landscape, rationale, data supporting position, alignment to needs and marketplace drivers, and program requirements.
- Development of annual curriculum and product development budget.
- Management of 16 curriculum development staff.
- Oversight of curriculum development processes and procedures to ensure compliance with applicable state and federal regulatory requirements, accreditation standards, professional education standards, and university policies.

Education

- Ph.D., Educational Psychology, University of Virginia, Charlottesville, Virginia
- M.A., Special Education, University of South Florida, Tampa, Florida
- B.A., Psychology, University of California, Davis, California

Project Consultants Bios

Baljit Hundal, MSW, MACP, Instructor

Methodical Senior Executive with over 15 years of comprehensive management experience overseeing daily operations of public and private health and human service programs. Versatile professional well-versed in executing business strategies, preparing and implementing business plans and overseeing financial performance with the community needs and clients' issues in mind. Education includes a Master of Social Work, California State University, Sacramento; Master of Counseling Psychology, National University, Sacramento; and a Bachelor of Social Work, California State University, Sacramento.

Danyelle Diaz, MBA, Instructor

Ms. Diaz is a leadership development specialist and consultant with a proven track record of developing and delivering engaging and highly effective training solutions for over 7 years. She is known for creating interactive and inclusive learning experiences both in person and virtually for diverse audiences across the USA, Canada, Mexico, Europe, and Asia. She has created and facilitated leadership development curriculum for organizations in the non-profit, humanitarian, aerospace and defense, healthcare, and government sectors. She customizes learning content to fit the needs of individual participants to meet business objectives.

Gil Morales, M Div., Instructor

Mr. Morales is a Project Consultant with CPS HR Consulting. He has over 10 years of experience in a teaching and training environment; specializing in leadership, personal development, team collaboration, project management, and productive work relationships. His contributions have developed leaders transition into their next phase of leadership, has helped organizations to cultivate cohesive and productive working relationships, and challenged individuals towards peak performance.

Mr. Morales works with many public sector agencies including CA Department of Human Resources, CA Department of Transportation, CA Department of Motor Vehicles, California Department of Managed Healthcare, CA Department of Corrections and Rehabilitation, City of Sacramento, Los Angeles Department of Water and Power (LADWP), CA Department of Industrial Relations, City of Pasadena, State Water Resources Control Board, and County of Orange.

Jennifer Houston, SPHR, Instructor

Ms. Houston has 30 years of experience in Human Resources, management, leadership and professional business experience. She has earned multiple certifications including Employment Law Certificate, Certified Mediator, Senior Professional in Human Resources, SHRM-Senior Certified Professional, and SHRM-People Manager Qualification. Her passion in all things HR and her experience in a variety of industries provide for an in-depth professional training experience.

Norm Lefmann, MPA, Instructor

Mr. Lefmann is an organizational consultant, helping public sector organizations develop and organize effective organizational strategies, including creating a dynamic workplace culture. Before leaving full-time employment in 2021, he directed all member programs for the California Joint Powers Insurance Authority's 124 public agencies, which included risk management, training, claims, and technology.

He also directed the organization's strategic planning process. Prior to the California JPIA, he worked for the City of Burbank, holding key responsibilities for several projects, including development of the city's capital improvement program budget and acquisition of an enterprise-wide financial system. He also served as the police department's senior civilian officer. He graduated with distinction, receiving a bachelor of arts from San Diego State University before earning a master of public administration from the Maxwell School at Syracuse University.

Yolanda Underwood, BA, Instructor

Ms. Underwood is a fully versed leadership trainer and coach that helps organizations achieve results. For over 20 years, she has specialized in providing teams with training and coaching sessions that are powerful and thought-provoking. Focusing on the areas of strategic planning, performance management, and leadership development, she is able to assist organizations to realize their goals. She works with departments and cross-functional teams as well as individuals at all levels. Her passion for helping leaders be their best is apparent in each session, through her energetic style that creates engagement and interest.

Her expertise in areas such as Effective Communication, Building Trust, Developing High Emotional Intelligence, and Creating High-Performance Teams focus on promoting a positive and productive culture. In addition, her vast experience in the area of performance management helps organizations focus on goal setting and staying the course to achieve those goals. She has built Performance Management systems from the ground up, as well as helped leaders support those already in place.

She has worked with a number of public sector agencies including Yuba County, Sutter County, Yolo County, Elk Grove Water District, Fresno County and the California District Attorneys Association, among others.

She possesses a B.A. in Economics and a B.A. in Political Science from the University of California, Berkeley. She is fluent in Spanish and has experience working to bridge the communication gap with those who understand Spanish more accurately.

Amy Stewart, MIM, Coach

Ms. Stewart is a Learning and Development Professional and ICF Certified Coach with experience successfully building and facilitating solid quality training and coaching solutions to support company goals and objectives. She is a creative thinker with the ability to drive initiatives through exemplary change management and leadership skills. Her certifications include International Coaching Federation (ICF), Coaching Training Institute (CTI) Coaching Certification, and Tracom Certified Social Styles Facilitator. She possesses a Master of International Management from Thunderbird School, Glendale, Arizona and a B.A. in International Relations from DePaul University, Chicago, Illinois.

Chaim H. Eyal, Ph.D., Coach

Dr. Eyal came to CPS HR Consulting in 2004 from a training and consulting career with the California State Training Center in Sacramento. As a trainer and consultant, he provides training, coaching, consulting, and research in the areas of organizational behavior, communication, management, and interpersonal interactions, and provides customized training and consulting in the areas of Organizational and Workplace Behavior. He has also consulted and conducted seminars, workshops, and training sessions in the private sector, both in the U.S. and internationally, in 22 countries. His experience includes military leadership positions, academic research and teaching, and private business management.

Some of his academic teaching experience includes: San Francisco State University, San Francisco, California; The Hebrew University of Jerusalem, Israel; Ohio State University, Columbus, Ohio, (Visiting Scholar); The Center for Management, Bar-Ilan University, Ramat-Gan, Israel; and Syracuse University, Syracuse, N.Y.

Lisa Bishop, MBA, Coach

Ms. Bishop is a professional leadership and organizational development consultant with extensive experience in consulting with leaders and decision makers to improve business effectiveness and engage employees with results. For more than a decade, Lisa has conducted soft skills training for public agencies, and volunteer management training for non-profits.

She possesses a broad and successful background in the execution of training programs to maximize employee motivation and attentive learning, and is experienced in e-learning and curriculum development.

She is certified and trained in several results-based training methodologies such as Emotional Intelligence, DiSC, Communicating Effectively with Leaders, Crucial Conversations, Crucial Accountability, Influencer, and Change Anything.

Nicole Welch, Ph.D., Coach and Instructor

Dr. Welch is an accomplished coach, organizational change and leadership development practitioner. She has extensive experience in Organization Development, Adult Education, and Human Resource Management. She has held leadership and management positions within private sector organizations. She has spent the last 12 years providing organizational development consulting services to public sector organizations at the local and state levels.

She is an ICF-certified coach and organizational change practitioner known for her enthusiastic and engaging style. Central to her approach is the importance of bridging human needs and motivations with business needs. Using a systems approach, she collaborates with clients to adopt holistic solutions that enable impactful and sustainable changes.

She possesses the following degrees: Doctor of Philosophy in Organizational Development and Change (Double Concentration in Organization Development and Evidence-Based Coaching), Fielding Graduate University, Santa Barbara CA; Master of Arts in Organizational Development and Change, Fielding Graduate University, San Barbara, CA; Master of Science in Organizational Development, University of San Francisco, San Francisco, CA; and Bachelor of Science in Organizational Behavior, National University - Sacramento, CA.

Her certifications include: Professional Certified Coach – International Coach Federation; Gallup-Certified Strengths Coach and Facilitator – Gallup, Inc.; Certified Emotional Intelligence Practitioner – Genos International; Leadership Practices Inventory Certified Coach – The Leadership Challenge, Inc.; Integrative Enneagram Solutions Certified – IE9 Solutions; DiSC Dimensions of Behavior – Resources Unlimited; Certified Conversational Intelligence Coach – The CreatingWE Institute; Coach U Certified Graduate – Coach University; Coach U Advanced Coaching Program Graduate – Coach University; ADKAR Change Management Certification – Prosci; Six-Sigma Green Belt Certification – Performance Management Group; Situational Leadership – Ken Blanchard Companies.

Michael David, eLearning

Mr. David is an eLearning consultant and instructional designer for CPS HR. He led the design effort implementing edapt, an adaptive platform, for BSN and NP courses. He is knowledgeable in Articulate Storyline, Rise, and Camtasia; Word, Excel, Power Point, Outlook, Teams, and Visio; Dreamweaver and Photoshop; Adobe Connect, WebEx, SnagIt, SharePoint, Salesforce, Respondus, Studymate, and Smartsheet.

He has experience designing and managing developments for graduate and undergraduate courses for DeVry University, Keller University, Carrington College, and Chamberlain College. His instructional design experience includes Adult learning Theories, ADDIE Model, Bloom's Taxonomy, Mobile Design, Storyboarding, Design Documentation, Rapid Development, Needs Analysis Documents, Design Thinking, and Adaptive Learning.

c. Section III – Qualifications

Approach and Methodology for Section IV – Scope of Work

Our Understanding of the Scope of Work

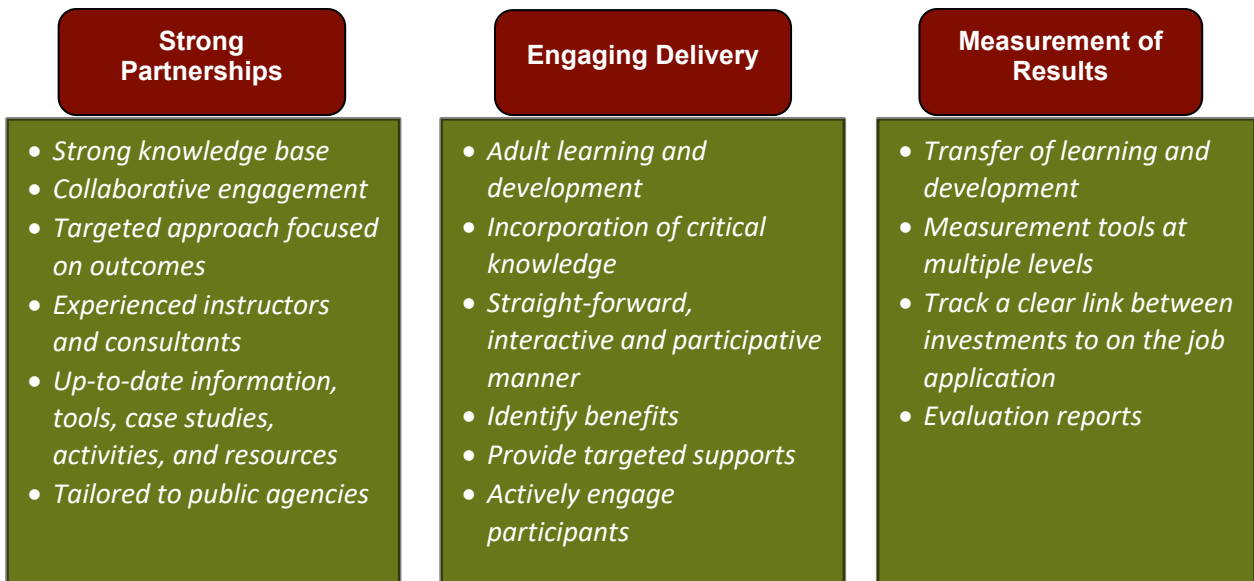
We understand the District is seeking support with professional development consultation services (as requested). Services may include coaching, as well as learning and development services for staff, managers and trustees. Provided services will enhance the District’s existing individual professional development program in order to equip participants with knowledge, skills, tools, and new ideas and strategies.

CPS HR has a robust catalog of more than 150 courses across 12 categories that can be delivered off-the-shelf or customized to meet the specific goals and objectives of the District. Outlined in the section on “sample course topics” are sample course descriptions in the areas of leadership development, communication skills, coaching and mentoring, human resources, risk management, customer service, and more.

CPS HR also has a skilled eLearning development team and can work with the District to create self-paced eLearning modules or courses as requested - eLearning development services will require a separate scope of work and price quote. Train the trainer course training is available for select topics.

Training Approach

This proposal to the District addresses your identified need to support the District’s employees with their continued professional growth and development.



Our Partnership with You

CPS HR becomes a partner with our clients to develop effective solutions to meet desired outcomes. We design creative and relevant engagements for training, coaching, facilitation, or consulting services. We develop effective measures to track participant success in transferring learning and development opportunities into enhanced on-the-job performance. Our project management, practical, learner-centered approach, and quality control mechanisms set us apart and drive the success of our programs.

Project Management

CPS HR's approach to any training and development project is built on developing a productive working relationship with our clients and ensuring our work product is based on adult learning principles, is designed to be experiential and facilitative, and is applicable back on the job.

We are concerned about making sure you receive the training that is needed. To ensure that, the Project Manager, Karen Evans, will monitor the project in the following ways:

- Check-in with a District point of contact at intervals during the engagement
- Review the course evaluation scores and comments
- Debrief with the instructor/coaches on a regular basis

In the event that an instructor or coach is not successfully performing the required services, the Project Manager will engage in the following remediation activities:

- Engage in constructive feedback conversations with staff based on subpar evaluations, participant feedback, or point of contact/other stakeholder feedback
- Adjust curriculum, method, or assessment tool
- Remove a staff member from an assignment

When working with our clients on a training and development engagement, we manage the project from start to finish. Our Project Manager serves as the lead and primary point of contact and will be responsible for regular and periodic communications, scheduling the courses or other development activities, overseeing the trainers/consultants/coaches, ensuring any needed adjustments are made, communicating any changes, and all reporting. Ms. Evans, in concert with other CPS HR staff, will provide immediate feedback to the District Project Manager regarding all customer requests for new or additional services or to lodge complaints.

Upon contract award, CPS HR will convene a stakeholder meeting to further define the District's expectations, discuss timelines and schedules, review curriculum, discuss any needed customization, and outline tasks and responsibilities.

Scheduling will be based on the District's need and coordinated by the Project Manager with a District point of contact. We can provide classes at the District's location in-person or as live, virtual instructor-led training. If in-person, the District will provide the venue with tables, chairs, and equipment such as an LCD projector, and a laptop. If virtual, CPS HR will utilize our delivery platform, Zoom or MS Teams, to deliver the training.

Prior to each event, our trainer will contact the District point of contact to confirm logistics and discuss any final details. CPS HR will brief our instructors prior to the delivery of any training on the District's location policies and procedures, including emergency procedures, non-competition agreements, ergonomics, paper conservation, evaluations, and sign-in rosters.

Course materials are all electronic.

If in-person, on the day of the event, our trainer will arrive 30 minutes prior to the start time to set-up. For a scheduled session, the instructor will incorporate appropriate breaks and adjust times to meet the needs of the audience. The CPS HR instructor shall provide the training for the entire time allocated for each class unless otherwise instructed by the District. The trainer is responsible for obtaining signatures on the roster and providing the original to the District. If virtual, the instructor will be online a minimum of 15 minutes in advance of the scheduled start time.

Upon course completion, the link for the online course evaluation will be sent to each participant. Electronic Certificates of Completion will be sent following verification of successful course completion. Participant comments are used to evaluate and improve any future class offerings.

Customized Training Development

Customized training will be developed in collaboration with you based on specific request(s) or identified needs or goals arising from initial stakeholder meetings.

Training Work Plan

Sample Work Plan and Schedule

CPS HR can schedule an off-the-shelf course in as little as eight weeks upon a fully executed contract with the District. For a customized course or other development activity, 12 – 16 weeks is realistic depending on the amount of customization required.

On the following page is a sample work plan illustrating how CPS HR will work with the District to design, develop, and deliver a training program or series of courses.

Task	Deliverable
Phase 1: Scheduling and Curriculum	
1. Kick-off meeting with the District and CPS HR to define expectations, review desired courses, discuss goals and learning objectives, and discuss timeline and schedules	<ul style="list-style-type: none"> Proposed work plan Course materials for review
2. Curriculum/Content Meetings (as needed) <ul style="list-style-type: none"> Set up meetings with stakeholders to gather additional information needed to tailor curriculum Ensure courses meet the learning objectives, current, easy to navigate and use in the classroom 	<ul style="list-style-type: none"> Draft curriculum
3. Work with District to tentatively schedule of classes or other services	<ul style="list-style-type: none"> Draft schedule
4. Any needed curriculum changes are completed	<ul style="list-style-type: none"> Finalized curriculum
Phase 2: Prepare for Training Program	
1. Schedule courses	<ul style="list-style-type: none"> Final course schedule
2. Electronic course materials are produced and made available to the District for dissemination to participants	<ul style="list-style-type: none"> Quality course materials
3. Instructor contacts District contact 5 to 7 days prior to the training day to confirm logistics and dissemination of course materials	<ul style="list-style-type: none"> E-mail/phone communication
4. Instructor preparation	<ul style="list-style-type: none"> Prepared instructors
Phase 3: Deliver Program	
1. CPS HR instructor sets up equipment needed for the course, i.e. laptop and projector (if in-person training)	<ul style="list-style-type: none"> A prepared classroom
2. Deliver class sessions as scheduled	<ul style="list-style-type: none"> Successful delivery of class
3. Approved training roster is completed (if in-person); Virtual platform attendance record.	<ul style="list-style-type: none"> Completed roster
Phase 4: Class Completion Activities	
1. Disseminate Training Evaluation link or QR code to each student before the completion of the class	<ul style="list-style-type: none"> Completed end of course evaluations
2. Distribute Electronic Certificates of Completion (if requested)	<ul style="list-style-type: none"> Distributed certificates
3. Instructor to tidy room (if in-person)	<ul style="list-style-type: none"> Clean training room
Phase 5: Manage and Administer Program	
1. CPS HR project manager will engage in regular and periodic communications	<ul style="list-style-type: none"> Feedback sessions Reports if requested
2. Update material (as needed)	<ul style="list-style-type: none"> Up-to-date training materials

Learner-Centric Training and Development

CPS HR's approach to learning and development is well-aligned to the District's training and development principles of:

- Clear Leadership Commitment
- Effective Content that is Well Designed
- Engaging Delivery
- Online Delivery

CPS HR's learning and development approach and philosophy is one of life-long learning focused on the learner, supporting growth and development at every stage in their career – from first job through job transitions and promotions. Our methodology is grounded in adult and active learning principles and engages learners in practical, application-based curriculum that can be immediately applied back on the job – learn today, apply tomorrow.

Online, self-paced and live virtual training, mixed with instructor-led classroom training is a powerful blend of delivering learning experiences that are meaningful and impactful, and that make the best use of instructor expertise and technology.

We are committed to continuous improvement and actively use the formal and informal feedback from training classes and programs to adjust and improve delivery and content. Our mindset is to try new approaches and to test and pilot. If we ever deliver less than expected, we learn from those missteps and grow and improve.

Learning and Development Methodology

CPS HR's approach to learning and development is grounded in adult learning principles (Knowles, Holton and Swanson, 2015)¹ within a framework of active learning. Our instructors are skilled in the use of active learning using multiple and varied approaches to training to engage participants in the training course/program. Our courses are highly interactive and participatory, and de-emphasize lecture with a learner-centered approach utilizing:

- Case Studies and Scenarios
- Paired and small-group work
- Dialogue, Debate, Small Group and Whole Group Discussion
- Check Your Knowledge quizzes and assessments, and more
- Experiential learning
- Problem-based learning

¹ Knowles, M. S., Holton, E.F., & Swanson, R. A. (2015). *The Adult Learner: The definitive classic in adult education and human resource development* (8th Ed). New York: Routledge.

We understand that adult learners need to be actively involved and engaged in their professional development. Our expert instructors promote dialogue, reflection, and application in their integrative approach leading engagement in the material and retention. They understand that to involve participants in the learning experience, learning must:

1. Be relevant to the experience and/or prior knowledge of the participant
2. Engage learners in exploration and discovery
3. Ask learners to actively apply and practice the content with a case study, simulation or other activity where they transfer and apply concepts, ideas, and content
4. Be learner-centered where participants are applying and transferring material to solving real-world, relevant situations

In designing curriculum, CPS HR utilizes the ADDIE model of instructional design in conjunction with backwards design and incorporates varied curricular and instructional activities (Gardner, 1993; Gagne, 1985; Dunn, 2000; Kolb, 1984)² and presentation methods to accommodate learning styles and preferences and level of training.

Quality Control and Evaluation of Training

CPS HR's process to evaluate program success and effectiveness is modeled on Kirkpatrick's (2016)³ four-step training evaluation model. CPS HR will develop an evaluation process in collaboration with the District to assess: (i) Reaction to the training; (ii) Learning; (iii) Behavioral changes (need as determined by the District); and (iv) Impact of the training (on organizational results) (need as determined by the District).

1. The first step includes immediate feedback after each training session. This will be accomplished through a survey at the end of each training session. The survey may ask participants about the instructor, the materials, how the training could be improved, etc. Our goal is 4.5 on a scale of 1-5 with 5 being the highest rating.
2. The second step includes transfer of learning. In this step, we want to assess changes in knowledge, skills and/or attitudes. The learning outcomes for the training course are the starting point for this evaluation step. One way this might be evaluated is through a pre- and post-assessment.

² Dunn, R. (2000). Learning styles: Theory, research, and practice. *National Forum of Applied Educational Research Journal*, 13 (1), 3-22.

Gagne, R. (1985). *The Conditions of Learning (4th Ed.)*. New York: Holt, Rinehart & Winston.

Gardner, H. (1993). *Frames of mind: The theory of multiple intelligences*. New York: Basic Books.

Kolb, D. A. (1984). *Experiential Learning: Experience as the Source of Learning and Development (Vol. 1)*. Englewood Cliffs, NJ: Prentice-Hall

³ Kirkpatrick, J. D., and Kayser-Kirkpatrick, W. (2016). *Kirkpatrick's Four Levels of Training Evaluation*. Association for Talent Development.

3. The third step is to develop a strategy to monitor and evaluate the effectiveness of the training in the long-run through application of skills ‘back on the job’ in professional practice. This might be accomplished with a follow-up survey, three to six months after the cohort training program or might also encompass interviews or observations.

This higher-level evaluation looks at: (i) Is the training being put to use? (ii) Are participants able to teach their new knowledge to others? (iii) Is there an awareness, by the trainee, that their behavior has changed?

4. The fourth step involves evaluating results – impact on the organization. This step is time-consuming and costly. A key to success to the fourth level of evaluation is determining, at the outset, the business or organizational results to evaluate. Outcomes to consider might include: (i) Higher morale; (ii) Increased customer satisfaction or fewer complaints; (iii) Higher quality; and (iv) Improved employee retention.

The Altadena Library District is fortunate to have in its backyard a training agency with full service consulting and training services for public sector clients. As our Course Catalog reveals, CPS HR offers training on all the topics for which you are requesting services, each of which can be customized to your on-site training requirements. You can view a copy of our current catalog using the following link: [2023-2024 CPS HR Training Catalog](#).

This distinctive combination of sound experience and availability of services provides a tremendous advantage to the District who can draw on a large and highly qualified cadre of certified trainers and consultants particularly adept at tailoring training topics to fit your needs. In addition to the executive coaches, trainers, and consultants available to you from our Northern California office, CPS HR partners nationally with other experts to draw upon to further customize your particular training or organizational development needs.

Offering services exclusively to public sector agencies, CPS HR has substantial experience working with cities and counties throughout California; the State of California, special districts, and other public service agencies. This gives us tremendous insight into the complexities and challenges inherent in District government operations that translates into relevant curriculum and instructional delivery.

Sample CPS HR Courses by Topic

Communication Skills

Collaboration: The Key Ingredient of a Well-Functioning Team

HALF-DAY COURSE - Collaboration is critical in today’s work environment. Whether working on-site, virtually or a fusion of both, teams are best served in partnership with others. The workplace today is complex. While individual achievements are encouraged, an environment of collaboration yields a synergy of individuals that creates innovative solutions. Each of us is hard-wired to want to succeed. Tapping that energy and bringing it into a collaboration results in a higher level of productivity, engagement, and morale.

Communicating Effectively

1-DAY COURSE - Communication skills are the foundation of effectiveness at work. With an emphasis on professional and clear communication, this one-day class will help you improve your oral communication skills, increase your ability to understand and be understood, and help you have more influence.

Conflict Resolution

1-DAY COURSE - This one-day class will provide you with tools, techniques and practice in resolving work conflicts involving employees, co-workers, supervisors or customers. Strategies for win-win outcomes are emphasized in this interactive class, especially ways to guide a conflict from a competitive mode into a collaborative one.

Coaching and Mentoring

Coaching and Mentoring for Leaders

2.5-DAY COURSE - Today, coaching is becoming a “go to” competency within organizations for development and growth. Coaching and mentoring processes are often confused with each other. There are clear and appropriate times to use either coaching or mentoring. During this program, we will create clarity between multiple “development” competencies. Coaching is a process that enables learning and development to occur and performance to improve at anytime and anyplace. Coaching helps to lay the foundation for improving the relationship between managers and the people they support and depend on. It recognizes the importance of clear agreements in all interactions and provides a context to create the safe environment essential for a manager and employee to engage in open and honest dialogue and communication.

Coaching as a Management Tool

1-DAY COURSE - This session looks at a shift in approach to managing employees that lends itself more to coaching than traditional top-down management. Technology and workplace changes have given employees more autonomy and freedom to be selective about priorities. The prominence of knowledge workers requires a different style of managing than the command-and-control regimen of the past.

At its core, coaching revolves around asking questions that help people discover the answers that are right for them. It stretches employees’ thinking so they can be more creative in their decision making, solve problems on their own, and enjoy more clarity and innovation. This session affords managers and supervisors a new approach and specific tools to engage and elicit high performance from employees.

HR Management

Fundamentals of Human Resources

1.5-DAY COURSE - Fundamentals of Human Resources is a 1.5-day course designed to provide an overview and context for the unique aspects of public sector HR. You will be introduced to the value of human resources as a business partner responsible for both understanding and promoting the organization's goals while also supporting public sector merit principles, ethics and culture. On the second day of the course an employment law attorney provides an overview of relevant laws. Note: The second day of this class will end by 12:30 p.m.

Job Analysis

1-DAY COURSE - This one-day course defines the job analysis, when it is appropriate to conduct one, why it is needed and the required elements. You will practice in class how to prepare for and conduct a defensible job analysis.

Workplace Investigations

1-DAY COURSE - Conducting effective workplace investigations is an important step in addressing harassment, discrimination and retaliation complaints as well as other legal or policy violations. Under applicable regulatory guidelines and HR best practices, workplace investigations must be thorough and impartial. Failing to conduct proper workplace investigations can result in significant legal exposure and impact to organizations. This workshop will provide the legal context as well as practical guidance into workplace investigations involving issues such as harassment and discrimination, safety, workplace violence, ethics, employee misconduct, workplace bullying, abusive conduct, and violations of policies and procedures.

Risk Management

Overview of Public Sector Exposures & Risk Management

HYBRID COURSE - This course is part of a five-session hybrid certificate program provides the foundational understanding of risk management practices in the public sector. The Hybrid online course combines self-paced eLearning with a live, virtual instructor-led session. The eLearning will take roughly two hours to complete and needs to be completed prior to your live virtual training.

This workshop is designed to help public entity practitioners manage their organization's risk and exposure by ensuring a basic knowledge of the relevant laws, foundations, and applications of Risk Management as a profession. Participants will also gain key concepts and tools related to the unique loss exposures faced by public entities.

Insurance Administration, Review and Risk Transfer

HYBRID COURSE - This course is part of a five-session hybrid certificate program provides the foundational understanding of risk management practices in the public sector. The Hybrid online course combines self-paced eLearning with a live, virtual instructor-led session. The eLearning will take roughly two hours to complete and needs to be completed prior to your live virtual training.

This workshop will help public entity practitioners learn about the complex, and sometimes confusing, world of insurance to protect their organization and manage risk. The workshop will also help participants successfully administer their organization's insurance and self-insurance programs.

Customer Service

Customer Service in the Public Sector

1-DAY COURSE - Today's customers are more demanding, less tolerant, and increasingly impatient. Though from divergent cultural backgrounds and languages, one thing today's customers have in common is they want it all, NOW. This one-day workshop builds on your already positive and professional service relationships and will help you go one step further to provide exceptional customer service.

Dealing with Difficult People

1-DAY COURSE - This one-day workshop helps you deal with challenging personalities in the workplace. Emphasis is on maintaining a professional approach while coping with various problem behaviors, whether it is with customers, co-workers or even a supervisor. In this very interactive class, you will recognize specific difficult behaviors, and will have guidance for deciding what is appropriate to do about each. You will also have the opportunity to discuss the costs of difficult behaviors, and what to do about them.

You will leave this training having options and feeling more in control, rather than feeling frustrated, helpless or manipulated by difficult people.

Leadership Skills

Building High Performance Teams

1-DAY COURSE - Team leaders need to know the basic concepts of building and maintaining an effective team. Effective teams produce at higher levels with better quality. Building High Performance Teams will demonstrate the power of teams and show team leaders how to use accountability and responsibility to improve your team's measurable performance.

Creating a Culture of Trust

1-DAY COURSE - Creating, nurturing and safeguarding trust may be the most important aspect of a work environment for manager and employee alike. In today's workplace, employee and manager often work remotely, whether in the field, down the hall, remotely or in separate buildings altogether. Without mutual trust, work relationships suffer, communication breaks down, productivity slows and engagement on the job all but disappears.

This session sheds light on the value and importance of trust as an essential ingredient in the workplace. It provides a context for why trust has eroded and offers solutions, strategies and action plans that redirect to create and maintain relationships where a culture of trust can thrive.

Effective Change Management

1-DAY COURSE - Designed for supervisors and managers, this course focuses on two aspects of the change process: 1) initiation, planning and implementation in the workplace, and 2) management of the change process through effective interaction with individuals, teams and stakeholders.

Stress Management

Squash Burnout and Thrive Instead

HALF-DAY COURSE - According to the Mayo Clinic, burnout is a special type of work-related stress— a state of physical or emotional exhaustion that also involves a sense of reduced. In this course, you will learn to recognize, reverse, and build resiliency to make work “work” for you again.

Stress Management

1-DAY COURSE - This one-day course will teach you coping techniques to reduce harmful effects of stress on productivity and personal well-being.

Supervisory Skills

Addressing Performance Problems - Discipline and Documentation

1-DAY COURSE - If you supervise people, this course is a must! While supervisors hope that they won't need to address performance problems, they need to know what to do when the time comes. This course provides a safe, confidential environment to learn what to do when performance problems occur. This course will teach manager show to identify performance problems and hold employees accountable to performance standards. It will also give supervisors tools and practice on how to have difficult conversations with employees and how to effectively coach employees to improved performance. Supervisors will also learn about the disciplinary process and performance documentation that will withstand legal scrutiny.

Conversations Worth Having Workshop

1-DAY COURSE - This workshop is an experiential learning opportunity that will give you the ability to positively impact individual, team and organizational communication. Learn new tools to establish communication practices that support productivity, engagement, high performance teams, and positivity. We will cover the power of conversation, the art of asking questions, intentional framing, and how to step up to feedback.

Empowerment and Delegation

1-DAY COURSE - Effective organizational development and performance, to a significant extent, depend on managers' ability to empower their team members and to delegate authority and responsibility effectively. This course offers managers, at all levels, practical tools, skills and attitudes to efficiently empower and enable employees.

Training Formats

CPS HR is able to offer training in the following formats:

- In-person/Classroom
- Live, Virtual Instructor-Led NOTE: Recording **not** available.
- Self-paced (Asynchronous) eLearning (select topics)
- Blended Learning (Risk Management Program only); Combination of eLearning and live, virtual instructor led

Coaching Approach

The coaching relationship enjoys powerful and dynamic interactions and growth. It comprises individuals or teams choosing to make positive changes and a coach to support those efforts. The coach only succeeds when those being coached succeed. This process begins with self-awareness, identified competencies, and desired changes or advancement through direct interviews and assessment tools. The coach transforms those insights and findings into an individual development plan. This plan serves as scaffolding to achieve those goals during the coaching engagement and beyond.

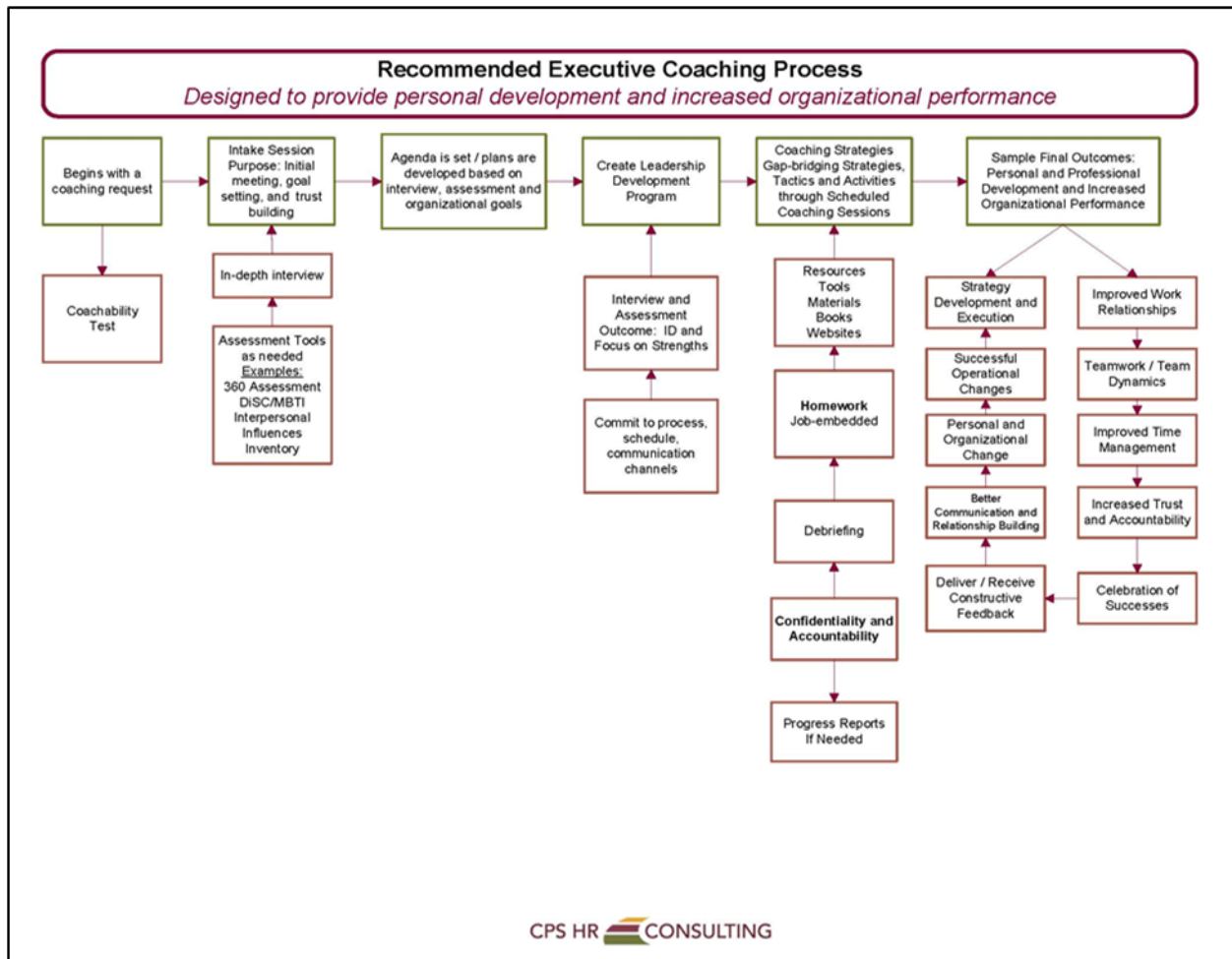
A flowchart of the process follows along with descriptions of its components. While this process is proven successful, it is important to remember that, overall, coaching is flexible and adaptable. The duration of the coaching engagement, the timing and length of sessions, and the methods of working together are mutually designed by the coach the person being coached. The coaching process can also adapt to a shift in direction between coach those being coached, whether individuals or teams, depending on changing needs. In short, coaching offers a dynamic, powerful, and personalized professional development tool that is effective for executives, staff members, and teams.

Coaching Workplan

Overview of Coaching Process

Whether coaching is a limited-term (one to three months) or a longer-term engagement (six months or longer), we follow a process that begins with self-awareness and discovery, maps to desired competencies, and carries through to an individual development plan with goals and objectives that can be achieved during the coaching engagement and beyond. A flowchart of the process follows which includes a narrative describing the various components.

Flowchart: Coaching Process



Intake Session & Assessment

Coaching begins with an initial Intake Session of the leader to be coached. This in-depth interview is designed to solicit specific information about the individual, their team, and the culture of the organization. We may also employ assessment tools at this point. A variety of assessment tools can be used depending on the desired outcome. Very often we base the assessment on an organization's competency model in this case we will focus the assessment in the five focus areas of interest to the District.

This initial session serves to:

- Explore and define the strengths and needs of the individual
- Ascertain an optimal way the coach and leader will work together
- Surface the goals, objectives, and perceived obstacles of the person being coached
- Discuss the leadership competencies that are important
- Explore the leader's self-knowledge and willingness for self-discovery
- Learn about the culture of the organization
- Begin to develop the trust essential in a coaching partnership
- Guide the leadership coach in designing a coaching program to satisfy the needs and desires initially expressed by the coachee

Questions from the Intake Session are along the lines of the samples below:

- What are you looking to achieve or improve or change at this point?
- Who is affected by this issue other than you?
- What action steps have you taken so far?
- What has stopped you from doing more?
- If nothing changes, what's likely to happen?
- If you trusted me enough to tell me how to coach you most effectively, what tips would you give me?
- What desired outcome would you like from coaching?
- How could this experience make you a better leader?

Assessment Tools

Typically, early in the coaching process a variety of assessment tools can be used, including a 360 Assessment. There are multiple 360 Assessments available which we can recommend if needed. We utilize several other assessment tools depending on what is needed for the individual situation. Some of the tools that we may use are:

- Interpersonal Influences Inventory
- StrengthsFinder 2.0
- DiSC
- Myers-Briggs Type Indicator (MBTI)
- Thomas Kilmann Conflict Mode Instrument
- Unconscious Bias
- Leadership Practices Inventory (LPI)
- CI-Q Catalyst 360
- EQ in Action Profile

Leadership Development Plan

Following the Intake Session, the leadership coach designs an overall approach and program of coaching strategies specific to the person being coached, called a Leadership Development Plan. If appropriate, this leadership plan is shared with the leader's superior for input and approval. Once consensus is reached, the plan serves as scaffolding for the overall course of the coaching, with the understanding that the direction can shift as the leader's needs, circumstances, or desires for additional skills change or expand.

Coaching Sessions

CPS HR Coaches will provide individual or group coaching sessions to selected leaders in sessions ranging from about one to three hours on a regular schedule or on an as-needed basis. Our coaches have both coaching and organizational development backgrounds with extensive experience to address behavioral, emotional, and business issues. Each coaching session will consist of development planning (i.e., setting goals, priorities, activities, and milestones), thought-provoking learning and self-discovery, tracking and gauging progress, sustaining momentum and renewing commitment, harvesting learning, and applying lessons back on the job. If desired, a coach will accompany the leader to important meetings or other events to observe workplace behaviors and provide feedback.

The coaching sessions will be designed to address common challenging areas such as the ones listed below or other identified needs:

- Clarifying work expectations
- Managing change
- Finding and working with blind spots
- Goal setting
- Dealing with conflict
- Self-image and self-confidence
- Communication skills
- Relationship building and collaboration
- Performance management
- Strategic planning
- Planning & having difficult conversations

The Coach engages in direct and candid conversations with the coachee, who can rely on the coach to be honest and straightforward in posing questions or making requests. The time spent in coaching is highly valuable and powerful, so the coach will always return the focus away from “stories” and back to the skills, techniques, behaviors, or other changes desired by the executive being coached.

Coaching Strategies

Strategies in coaching sessions include:

- Clarifying questions
- Requests for action
- Brainstorming ideas or solutions together
- Practicing techniques
- Role-plays
- Individual development plan
- Other methods to assist the success of the coaching relationship

The final coaching session will focus on the progress as measured by the development plan and assist the leader in identifying means to sustain new behaviors and continued professional development.

Resources and Homework

The leader is afforded materials, references, recommended reading, and other resources and activities to enhance the coaching process. Emails and calls may occur between sessions where insights and ideas are shared, or actions reported. Job-embedded “homework” is assigned at each session to embed actions or recent learning into the workplace. These assignments are debriefed at subsequent sessions to internalize the learning and instill accountability in the process.

Confidentiality, Accountability and Reporting

Within the coaching relationship lies the opportunity to guard confidentiality, to express concerns if the coaching process or relationship is not working, and to celebrate successes as they occur. Ideally, the interaction always refocuses the power to the coaching relationship as the forum from which professional development occurs.

High-level reporting that documents overall progress and level of satisfaction with the services will be provided on an ongoing monthly basis or as requested. While confidentiality will preclude discussions about specific conversations, outcome level progress on findings and interactions can be shared and discussed. The most powerful evidence of results will be exhibited in demonstrated behavioral change.

Sample Individual Executive Coaching Schedule

Task	Length	Timeframe
Intake Session	2 hours	As scheduled
Schedule 1:1 interviews with identified stakeholders	N/A	As determined by engagement
Compile assessment results report(s); Synthesize data from interviews for each individual; compile individual reports	3 hours per individual	Within two weeks of final data gathering
Debrief with client and deliver results from interviews	1.5 hours per session	As determined by the engagement
Develop individualized leadership plan	2 hours	Following assessment results report
1:1 Coaching sessions; Recommended bi-weekly or weekly; minimum of three (3) months	1 hour each	Variable; 3 to 12 months
Status reporting (as requested)	N/A	As requested

Similar Work Examples/Successful Projects

We specialize in leadership development programs blending 360 assessments, training, and/or coaching to produce learning that is implemented back on the job in the workplace. For our coaching programs, we blend self-assessment, self-discovery, and organizational thinking to produce individual growth that makes a difference for the employee and the organization.

Following are recent highlighted projects conducted by our consultants/coaches employed by CPS HR. (More details regarding specific projects, including contact information, are included under the **References** section.)

- CPS HR was engaged by the **County of Fresno, Department of Social Services** from 2019 – 2020 to design and deliver a leadership academy for all agency supervisors. 230+ supervisors completed the 8-course program which also included the Leadership Practices Inventory (LPI) pre- and post-program. Courses included: Extraordinary Leader, Creating a Culture of Trust, Problem Solving and Decision-Making, Leading Effectively, Coaching as a Management Tool, Motivation, Communication Skills and Conflict Resolution.
- CPS HR is currently engaged by the **City of Sacramento** to deliver all staff and leadership training. This is a multi-year agreement beginning in January 2022 after a successful pilot program in 2021. More than 50 courses are offered to City employees. Courses include: Discovering and Working with Your Talents and Strengths, Coaching for Performance, Managing Your Time Wisely, Emotional Intelligence, Project Management, Introduction to Analytical Staffwork, Public Speaking, Interviewing Skills, Bridging the Technological Gap of Analytical Work, and many more.

- **El Dorado County** has engaged CPS HR for several years and we have delivered a variety of training programs and courses. Training has included Implicit Bias training for Board Commissioners, Customer Service for all county staff, Telework and Teleperformance training for staff and managers, Process Improvement, Coaching and Mentoring, and many more.
- CPS HR was engaged with the **California Department of Industrial Relations, Department of Occupational Safety and Health (DOSH)** for 18-months to provide leadership coaching for 15 managers and senior leaders. This engagement included up to 15 hours of coaching per leader and the use of a variety of assessment instruments (e.g., 360 assessment, MBTI, DiSC). Services included identifying areas for development and increase/emphasizing the use of strengths and working on a development plan with targeted goals. Each coaching session was 1 – 1.5 hours in length with meetings scheduled based on the coachee’s schedule and availability.
- CPS HR has delivered leadership and executive coaching services to several leaders in the Human Services Agency, the Department of Aging and Adult Services, and the Planning Department at the **City/County of San Francisco**.
- **California Earthquake Authority**. CPS HR was engaged to provide leadership development services for a group of managers at the California Earthquake Authority (CEA). The services included the administration and analysis of the results of two individual assessment instruments, followed by individual coaching. CPS HR administered the CPS 360 assessment and the DiSC assessment to a group of 10-supervisors and managers in IT and HR, provided individualized reports for each participant on each assessment, debriefed the report(s) with each individual and provided an additional coaching session (in addition to the coaching/debriefing session.)
- **Consolidated Mutual Water Company (CMWC)**. CPS HR was engaged by CMWC to consolidated to provide coaching to identified managers and officers. The CPS HR coach worked one-on- one with each coachee, following a defined process developed by the coach which included identifying areas for development and increase/emphasizing the use of strengths and working on a development plan with targeted goals. Each coaching session was 1 – 1.5 hours in length with meetings scheduled once or twice per month.

Partial Client List – More Training Examples

Client	Project Description	Delivery Method	Date(s)
City of Pasadena	All staff, manager, supervisors training, and technology	In-person/onsite and virtual instructor-led	2014 – Current
City of Temecula	Supervisory skills development series and all staff training	In-person/onsite and virtual instructor-led	2018 – Current
County of Shasta	Supervisory Skills Development; All staff training courses for the Health and Human Services Agency	In-person/onsite and virtual instructor-led	2019; 2021 – 2022
Department of Motor Vehicles (DMV)	Various training for managers/supervisors and staff	In-person/onsite and virtual instructor-led	2008 – Current
Department of Transportation (CalTrans)	Various training for supervisors, managers and staff; Implicit Bias eLearning course for all DOT employees	In-person/onsite and virtual instructor-led; eLearning	2008 – Current
County of Sacramento	Various training for managers/supervisors and staff	In-person/onsite and virtual instructor-led	2014 – Current
San Diego Association of Governments (SANDAG)	Various training classes including the CPS cultural intelligence series, work-life balance, and resilience.	In-person/onsite and virtual instructor-led	2017 – Current
Sacramento Housing and Redevelopment Agency (SHRA)	All staff training; Emerging Leaders; On the Job training; Manager / Supervisor training; Leadership Development Program (LDP); Custom teleworking series	In-person/onsite and virtual instructor-led	2016 – Current
City of Mountain View	Various training classes for managers/supervisors and all staff; various eLearning courses	In-person/onsite and virtual instructor-led; eLearning	2020 – current
Alameda County Water District (ACWD)	General supervisory and all staff courses; CPS HR cultural intelligence series; respectful workplace	In-person/onsite and virtual instructor-led	2017 – 2022; 2023 – current
Inland Empire Utilities Agency (IEUA)	General staff and manager courses including presentation skills and recruitment and selection	In-person	2023 - current
City of Menifee	Leadership development program; customer service	In-person	2021 – current
County of Orange	Advanced communication skills; essential analytical skills	In-person/onsite and virtual instructor-led	2018 – current
Moulton Niguel Water District	Business Writing	In-person	2023 – current

d. Section IV – Cost Section

SECTION VII COST SHEET

7.0 INTRODUCTION

Proposer shall complete cost sheet to include all costs, including travel and per diem in accordance with the Scope of Work defined in Section IV. Proposer will submit detailed cost sheets on reimbursable costs, as back up to this summary page; however, total costs must be reflected on this summary page.

Proposer shall also include a Fee Schedule for additional services that may be requested.

7.1 COST FOR SCOPE OF WORK, SECTION IV

a. Fee Schedule For Professional Development Services For Term Of Contract

Position	Hourly Rate		
	1 st Year	2 nd Year	3 rd Year
Instructor: In Person Group Training*	\$600 - \$750 /hour	\$600 - \$750 /hour	\$600 - \$750 /hour
Instructor: Live, Virtual Instructor Led Group Training*	\$412.50 - \$575 /hour	\$412.50 - \$575 /hour	\$412.50 - \$575 /hour
Coach (Virtual)	\$325/hour	\$325/hour	\$325/hour
Coach (Onsite, In-Person)	\$375/hour	\$375/hour	\$375/hour
Curriculum and Instructional Designer/Developer	\$210/hour	\$210/hour	\$210/hour

***NOTE:** CPS HR prices group training at a flat, all-inclusive rate for a class of up to 30-participants. Hourly rates will vary based on the length of the class and whether the class is in-person, onsite or virtual. Course lengths/ Hours are provided under Supplemental Pricing Details on the following page.

b. Identify costs cap as necessary.

This proposal submitted by: CPS HR Consulting
Company Name


Address: 2450 Del Paso Rd, Suite 220, Sacramento, CA 95834

Telephone Number: (916) 471-3338

Fax Number: N/A

Business License Number: Registered with CA Secretary of State as Joint Powers Authority. We are government entity and operate not for profit so should be exempt.

Contact Name: Melissa Asher, Sr. Practice Leader, Products & Services

Authorized Signature: 

Fee Schedule for Requested Additional Services

Note: eLearning development is available; however, any eLearning projects requested will be priced under a separate scope of work when the request is made.

Supplemental Pricing Details

The following table provides the rates for all services under the contract and any other costs associated with providing your services. CPS HR flat rate pricing includes the instructor time, all course materials, project manager time, and any needed travel on the part of the CPS HR staff.

Course Length	Virtual, Instructor-Led Training (LVT)	Onsite, Instructor-Led Training
1 hour	\$575.00	N/A
1.5 - 2 hours	\$1,125.00	N/A
2.5 - 3 hours	\$1,450.00	N/A
½-day	\$1,800.00	\$3,000.00
1 day	\$3,300.00	\$4,800.00
2 days	\$6,000.00	\$9,000.00
2-½ days	\$7,200.00	\$11,750.00
3 days	\$9,600.00	\$14,500.00

- *Classes less than 4-hours (half-day) in length are not available as onsite training.*
- **Note:** *The cost of third party assessments or materials (i.e. Franklin Covey materials, StrengthsFinder) are charged as an **additional cost**.*
- *Hours for any additional services that may be requested will fall into one of the above hourly rates depending on the request and agreement by CPS HR and the District.*

The table on the following page provides the rates for all services under the contract and any other costs associated with providing services.

Staff Person Title/Role	Service	Length	Rate	Rate Type
Coaching				
Coach	Individual Coaching (All work completed by the coach associated with each coaching engagement)	N/A	\$325 - \$375	Hourly
Project Manager	Project management and project oversight	N/A	\$150	Hourly
Assessments				
Coach	Assessments	Actual costs estimated between \$25 - \$350 per person (depending on the assessment instrument)		
Curriculum Design and Development				
Project Consultant	Curriculum design and development and/or customization	N/A	\$210	Hourly

- **Note:** The cost of any assessment will be charged at the **actual cost**.
- Hours for any additional services that may be requested will fall into one of the above hourly rates depending on the request and agreed upon by CPS HR and the District.

Mark-Up and Travel

CPS HR does not mark-up any supplies or materials. All supplies and materials are provided to our clients at cost. CPS HR does not charge separately for travel. Our course fees are based on a flat rate price that is inclusive of travel.



Mitchell Christopher
Managing Partner

September 26, 2023

Nikki Winslow
District Director
Altadena Library District
600 E Mariposa St
Altadena, CA 91001

RE: Response to Request for Proposals for Professional Development Consultation Services

Dear Ms. Winslow:

MCG & Associates is pleased to submit this proposal in response to the Proposals for Professional Development Consultation Services for the Altadena Library District.

MCG & Associates is a management consulting and service solutions company that partners with our clients to help them achieve their vision of excellence. The Partners of MCG are development and training professionals with demonstrated achievement and expertise in supervisory/management development, performance management, and team building.

We strongly believe that we will be a great partner to the Altadena Library District. MCG is a certified MBE (CPUC).

MCG is willing to enter into a contract under the terms and conditions prescribed by the Altadena Library District Professional Services Agreement and we have no exceptions to the RFP.

Mitchell Christopher, Managing Partner of MCG & Associates, will serve as the primary contact and project manager. He can be reached at:

Mitchell Christopher
MCG & Associates
15030 Ventura Blvd, Ste. 301
Sherman Oaks, California 91403
(310) 503-2104
mitchell@mcgassociates.net

Thank you in advance for the opportunity and consideration. Should you desire or require any clarifications, please don't hesitate to contact me at the email or call at the above contact points.

Best Regards,

A handwritten signature in blue ink that reads 'Mitchell Christopher'.

Mitchell Christopher
Managing Partner
MCG & Associates
310-503-2104



ALTADENA LIBRARY DISTRICT

**RESPONSE TO RFP FOR
PROFESSIONAL DEVELOPMENT CONSULTATION SERVICES**

Proposal Date: August 29, 2023

Submission Date: September 26, 2023

MCG & Associates
15030 Ventura Blvd., Ste. 301
Sherman Oaks, California 91403
310-503-2104
www.mcgassociates.net

**RESPONSE TO RFP FOR
PROFESSIONAL DEVELOPMENT CONSULTATION SERVICES**

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EXECUTIVE SUMMARY

MCG & Associates (MCG) is pleased to submit the attached proposal to the Altadena Library District (District) to provide Professional Development Consultation Services on an as-needed basis, and may include services related to the coaching and development of District employees, managers and trustees.

Per the information provided, we understand that the project will consist of the performance of activities to provide the following results:

- Cultivate an environment of resiliency and growth among staff.
- Foster service-oriented goals within the District.
- Maintain high-quality professional development framework that fulfills the mission and vision of the library through the work of its employees.

We also understand that the services to be provided, although not all-inclusive, may include:

- a. Identify and meet training objectives that accommodate a range of trainings for both individuals and groups such as: technological, supervisory, leadership, personal, and professional/career development.
- b. Program content should include: clarifying work performance expectations, importance of communicating clearly, addressing difficult conversations, and performing leadership assessments and coaching.
- c. Implement instructional design methods to ensure transfer of learning.
- d. Develop a strong coaching program that provides the necessary tools and assists the managers and District Director to maximize their leadership effectiveness.
- e. Enhance the District's Individual Professional Development program, which has already been implemented for all District employees, by equipping participants with skills, tools, and ideas to support their professional development.
- f. Provide train-the-trainer course training, where appropriate, for designated District staff.
- g. Coordinate with District leadership to create a customized performance evaluation process for all job classifications.

As needed, assist the District with the following additional services:

- h. Developing classroom-style and e-learning customized training modules on specific topics such as: leadership development, effective communication (written and verbal), coaching and mentoring, human resources management, quality customer service, safety and risk management, succession planning, conflict resolution, problem solving/decision making, stress management, team building, and career and professional development.
- i. Develop course curricula and training materials to accompany each training course.

MCG & Associates has demonstrated knowledge and experience in successfully managing and completing Professional Development Consultation Services projects. We will implement the professional development and training processes defined by the District to conduct the project and ensure that all issues and opportunities identified and addressed. Our performance will

produce a clear, action-oriented training and processes that will be used to positively impact the Altadena Library System.

This proposal presents our approach to provide Professional Development Consultation Services. It also highlights the experience and expertise that our team brings to this project.

SECTION I - EXPERIENCE

MCG & Associates (MCG) welcomes the opportunity to provide Professional Development Consultation Services for the Altadena Library District (District). We have the specific knowledge and professional experience with assisting local governmental utilities/entities, non-profits, and businesses to effectively collaborate with the District to provide professional training services. In addition to our consulting experience, our Principal Consultants have held executive leadership positions in major corporations and have hands-on experience in training and mentoring business leaders.

With over 30 years of collective management, the founders and Partners of MCG have skilled backgrounds in mentoring, training, and organizational development that will easily be leveraged by the District.

PROFILE

MCG & Associates is a registered California C-Corporation, formed October 3, 2014 (C3716598).

Company Name:	MCG & Associates	MCG & Associates
Business Type:	Corporation	15030 Ventura Blvd., Ste. 301
State of Formation:	California	Sherman Oaks, California 91403
Date of Formation:	10/3/14	310-503-2104
Corporation Number:	C3716598	www.mcgassociates.net

Principal Consultant: Mitchell Christopher
mitchell@mcgassociates.net

CERTIFICATIONS

SBE and EBE - OSDS (City of Los Angeles)	MBE - Supplier Clearinghouse (CPUC)
SBE (Micro) - DGS (California)	MBE, SDB, and AABE - SAM (Federal)
MBE and LSBE - Los Angeles County	

FINANCIAL STABILITY

MCG & Associates is a corporation in good standing with the Secretary of State and Franchise Tax Board of the State of California.

EXPERIENCE

The Partners of MCG have experience in providing professional development services for government entities. We have a demonstrated understanding of requirements of municipalities, businesses, and nonprofits and have developed and counseled successful leaders to the achievement of goals and objectives, while achieving and maximizing their workgroup's performance.

A sample of our related experience and success is provided below:

- MCG & Associates currently provides On-Call Coaching Services and Professional Development Programs for the Los Angeles County Department of Public Works.
- Designed a modular training course for mobile devices to instruct citizens on how to acquire the City of Los Angeles Sidewalk and Park Vending Permit.
- Evaluated, re-designed, and implemented comprehensive training programs for the operations workforce.
- Developed and conducted compliance training programs to ensure that city, state, and national regulatory requirements were met and maintained.
- Directed the redesign of a technician training program resulting in and improved field performance, while reducing training time and costs.
- Served as corporate media spokesperson and trained management personnel in corporate crisis communications to ensure proactive media outreach and coverage of key business messages.
- Designed and implemented a detailed safety training program that generated significant annual improvement of field safety performance for a ten-year period.
- Developed, evaluated, and implemented strategic corporate disaster plans to provide for the safety of employees and residents, while providing for the continuation of service delivery through natural and physical disasters.
- Managed large (1000+) field technical workforces, serving multiple facilities nationally, with responsibility for training and performance.
- Conducted corporate and field training courses utilizing multiple formats, i.e., in-person and virtual classes.

MCG & Associates currently serves on the consulting benches of multiple City of Los Angeles Departments (Bureau of Street Services, Department of Transportation, Department of Cultural Affairs).

PAST PERFORMANCE

MCG & Associates has successfully completed every contracted project and engagement.

MCG has never received any disciplinary actions, administrative proceedings, malpractice claims or other like proceedings against our firm or any of its personnel relating to our firm's services as Professional Development Services, whether current, pending, or occurring in the last five (5) years.

REFERENCES

MCG & Associates has performed similar projects for businesses, government entities, and non-profits in southern California. Examples of such projects are provided below.

Client	Project Description
<p>Los Angeles Public Library 630 W. Fifth St., Los Angeles, CA 90071 Madeleine Ildefonso Managing Librarian Office of Civics and Community Services Engagement and Learning Division 213-228-7387 mildefonso@lapl.org Contract Term: 2021 - 2023</p>	<p>Designed a modular training course for mobile devices to instruct citizens on how to acquire the City of Los Angeles Sidewalk and Park Vending Permit.</p>
<p>ES Advertising 6222 Wilshire Blvd., Ste 302 Los Angeles, CA 90048 (323) 964-9004 Sandra@esadvertising.net Sandra Lee, President Contract Term: One year, with ongoing support provided when requested Contract Term: 2016</p>	<p>Engaged to restructure the organization to support the agency's business strategy, work, and processes.</p>
<p>City of Los Angeles, Bureau of Street Services (StreetsLA) 1149 S. Broadway, Suite 350 Los Angeles, CA 90015 (213) 847-6000 richard.shirvani@lacity.org Richard Shirvani, Management Analyst Contract Term: 2021 - 2023</p>	<p>Provided on-call community outreach and education pertaining to various site-specific, regulatory, and programmatic advancement of the City's Sidewalk and Park Vending Program.</p>
<p>Rebuild California Alliance 7622 Avalon Los Angeles, CA 90003-2326 (323) 422-1124 deantwan@msn.com Rev. DeAntwan Fitts, President Contract Term: 2019 - 2023</p>	<p>Engaged to provide a non-profit corporation based in south Los Angeles, with executive guidance in the development and management of organizational governance, compliance with regulatory guidelines. Also provide professional assistance in the development of a program to build low-income housing.</p>

<p>Restore Hope Faith-Based Alliance 8762 S. Central Avenue Los Angeles, CA 90003 (323) 717-6533 pfargas@aol.com Rev. Patricia Strong-Fargas, President Contract Term: 2019 - 2023</p>	<p>Engaged to perform community outreach to facilitate the creation of coalition of faith-based entities, residents, and other institutions (businesses, non-profit organizations, schools and educators, etc.) working to improve life in Los Angeles City Council District 9.</p>
<p>Salvation Army South Los Angeles Youth & Community Center 7651 S. Central Avenue Los Angeles, CA 90001 (310) 357-9739 Mortimer Jones, Executive Director Contract Term: 2019 - 2022</p>	<p>Engaged to assist The Salvation Army Siemon Youth & Community Center in the development of a strategic plan associated with the management of the non-profit based in south Los Angeles.</p>

SECTION II - PERSONNEL

MCG & Associates will staff the professional development consultation services engagement with the personnel listed below. They are experienced executives and consultants that have and identified, coached, and mentored management personnel to advance and grow within their organizations. Our Principal Consultants have also managed departments like those at the District and are familiar with the demands and expectations placed on the coaching clients.

The MCG project team has the following qualifications/skills/knowledge:

- Experience in identifying the professional strengths and weaknesses of key employees and developing and implementing coaching programs to improve their performance and maximize their contributions to the organization.
- Proven expertise and knowledge of academic research, best practices and training methodologies, and community-based participatory research.
- Ability to develop an achievable work plan and meet or exceed project deadlines as outlined in the project schedule.

MCG & Associates' project team members are provided below:

- **Mitchell Christopher** is the Managing Partner of MCG & Associates and will serve as the Project Manager for this project. He will conduct and participate in all necessary status update conference calls or meetings necessary to maintain program integrity and cadence in partnership with the District. He will also be responsible for the management and performance of all MCG project personnel.



Mitchell co-founded MCG & Associates after a thirty-year career where he specialized in project management, organizational development, strategic planning, technical workforce management, community service and outreach, and complex problem solving in business and residential environments. He has created and managed individual and organizational programs to identify and develop critical personnel, resulting in improved performance and increased responsibilities for major corporations and non-profits.

Mitchell received a Bachelor of Business Administration (BBA), Business Route to Electrical Engineering from The University of Texas at Austin and a Master of Business Administration (MBA) from The University of Dallas. Mitchell also completed the Executive Leadership Development Program (ELDP), a joint program of the National Association for Multi-Ethnicity in Communications (NAMIC) and the UCLA Anderson School of Management.

- **Dr. Shawna Charles** a Partner of MCG & Associates and will serve as a Principal Consultant for this project. She is a recognized thought leader and strategist providing strategic communication guidance to her clients helping them protect, promote, and evolve their brand. Her leadership is solution-driven, combining ingenious thinking and strategic planning for businesses, organizations, and individuals. Shawna is an Executive Coach, mentor, and trainer.



Shawna is graduate of Howard University and holds a Master of International Business Administration and a PH.D. in Clinical Psychology. She is the founder of Information Xchange Group, a public relations agency focusing on crisis management, reputation management, public relations, and community relations. She is also the founder of Bolster Up Biz, a business strategy firm that helps women entrepreneurs grow, live their purpose, and Bolster Up their digital presence.

Shawna is the creator of Access Ed Academy an online Center of Excellence of that provides training and programs improving the reach of critical expertise, focused on leadership, best practices, research, communication and more.

She has been recognized by the City of Los Angeles, University of Southern California, New York Rescue Mission among other organizations for work that she has done in the community.

- **Dr. Marlyn Garcia** is a Partner and co-founder of MCG & Associates and will serve as a Principal Consultant for this project. Marlyn co-founded MCG & Associates with an extensive background in marketing, business and organizational development, and public relations. She has held executive leadership roles in the public and private sector, developing and executing management strategies and community outreach that targeted customers, elected officials, and community-based organizations. She also possesses academic research skills, specifically related to advanced study of organizational leadership and Diversity, Equity and Inclusion performance in the Entertainment industry.

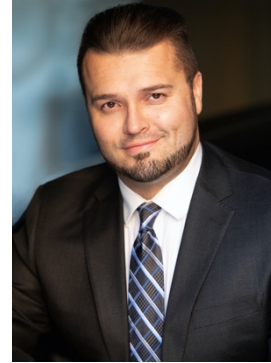


Marlyn has performed a leadership role in developing and executing public affairs strategies and community outreach that targeted customers, elected officials, and community-based organizations. Among the organizations she has supported are: Hispanas Organized for Political Equality (HOPE), Heart of Los Angeles Youth (HOLA), Salvadoran American Leadership Education Fund (SALEF), Salvation Army, East LA Youth Center, PUENTE Learning Center, Habitat for Humanity, Padres Contra El Cancer, Korean Youth Community Center, Asian Pacific Legal Aid, and the Chinese American Museum. Ms. Garcia was also selected to join US-based community and civic leaders to monitor the 2009 and 2013 presidential elections in El Salvador as part of international observer delegation with SALEF.

Marlyn received her Doctor of Education (EdD) in Organizational Leadership from Pepperdine University. She is currently a PhD candidate at Pepperdine University. Marlyn received a Bachelor of Arts, Business Administration from Loyola Marymount University and a Master of Business Administration from Loyola University Chicago. She

is also a graduate of the Executive Leadership Development Program (ELDP), a joint program of the National Association for Multi-Ethnicity in Communications (NAMIC) and the UCLA Anderson School of Management. Marlyn is fluent in English and Spanish.

- **Justin Flint** is an Associate of MCG & Associates and will serve as the Project Administrator for this project. He is accomplished administrator with experience working in high-pressure environments. He is a strategic team builder with the ability to motivate personnel to maximize performance and meet tight deadlines without compromising quality. Justin is skilled in creating detailed plans and leading successful product launches, promotions, and development. He is also well-versed in video content production, social media audience engagement, and brand management.



Justin received a Bachelor of Arts, Psychology from California State University Northridge, Northridge, CA.

Project Responsibility: Project Administrator.

The resumes of Mitchell Christopher, Shawna Charles, Marlyn Garcia, and Justin Flint are provided in the Appendix.

SECTION III - QUALIFICATIONS

MCG & Associates has over five (5) years of experience in providing consulting services related to, but not limited to, employee training and development and curriculum development with agencies comparable to the District. MCG has a demonstrated understanding of requirements of municipalities, businesses, and nonprofits and have developed and implemented successful solutions to drive the achievement of goals and objectives. We have the character, integrity, reputation, judgment, experience, and efficiency required by the contract. MCG has performed satisfactorily in previous contracts of similar size and scope, or otherwise demonstrated its capability to perform the contract.

UNDERSTANDING OF SCOPE OF WORK

Per the District's RFP, the Consulting Team will provide Professional Development Consultation Services that fulfills the District's requirements. The Team will be responsible for all activities required including the coaching and development of District employees, managers and trustees.

The District's Professional Development Services Consultation Scope of Work consists of the following tasks:

- a. Identify and meet training objectives that accommodate a range of trainings for both individuals and groups such as: technological, supervisory, leadership, personal, and professional/career development.
- b. Program content should include: clarifying work performance expectations, importance of communicating clearly, addressing difficult conversations, and performing leadership assessments and coaching.
- c. Implement instructional design methods to ensure transfer of learning.
- d. Develop a strong coaching program that provides the necessary tools and assists the managers and District Director to maximize their leadership effectiveness.
- e. Enhance the District's Individual Professional Development program, which has already been implemented for all District employees, by equipping participants with skills, tools, and ideas to support their professional development.
- f. Provide train-the-trainer course training, where appropriate, for designated District staff.
- g. Coordinate with District leadership to create a customized performance evaluation process for all job classifications.

As needed, assist the District with the following additional services:

- h. Developing classroom-style and e-learning customized training modules on specific topics such as: leadership development, effective communication (written and verbal), coaching and mentoring, human resources management, quality customer service, safety and risk management, succession planning, conflict resolution, problem solving/decision making, stress management, team building, and career and professional development.
- i. Develop course curricula and training materials to accompany each training course.

APPROACH TO SCOPE OF WORK

MCG & Associates will conduct and complete the requested Scope of Work through the performance of the District defined tasks. We will complete all assigned work within agreed upon time frames and within established District regulations.

Each professional development consultation assignment will follow these guidelines:

Coaching Activities

- MCG will work with the District to schedule on-call coaching and professional development program assignments. Our coaching sessions will be highly interactive, utilizing adult learning techniques including discussions, case studies, exercises, simulations, demonstrations, role play, and written exercises, as appropriate for the coaching topic.
- MCG will consult with the District and develop an individualized coaching program for each assignment. The program will follow a basis agenda of:
 - Introduction
 - Goals and objectives determination
 - Skills and management style assessment
 - Strategy development
 - Strategy implementation and performance tracking
- The coaching program will be customized based on participant assessment and goal setting.
- The MCG project team will provide monthly progress reports to detail the status of all assignment components and document any issues and concerns.

Professional Development Training

- MCG will work with the District to develop professional development training. Our training sessions will be highly interactive, utilizing adult learning techniques including discussions, case studies, exercises, simulations, demonstrations, role play, and written exercises, as appropriate for the training topic.
- MCG will conduct customized training for the District's designated training groups on topics including, but not limited to, the following:
 - Improving leadership and decision-making skills.
 - Enhancing job performance.
 - Managing employees and workplace situations.
 - Boosting employee morale.
 - Creating a safe and ethical workplace.
 - Improving teamwork.
 - Enhancing interpersonal relationships.
 - Self-management.
 - Project Management.

- Succession planning.
- The stakeholder/sponsor will schedule each in-person training class in advance and provide all notifications and class registrations with manager attendees.

Management & Scheduling

MCG & Associates will manage the professional development consultation assignments to ensure that tasks are performed and completed on schedule. Any missed dates will be documented and immediately addressed with the District. Professional development program project status will be reported in regularly scheduled project team meetings, which will include the District and MCG project managers and critical personnel.

MCG & Associates will conduct monthly status meetings with the District. The purpose of the meetings will be to provide project status and to identify and address any process issues that would negatively impact the training performance. Our objective is to maintain open and positive communication channels with the District throughout the District project.

Project Methodology

MCG will utilize Critical Path Project Management Methodology, a structured approach that is customized to define and implement assigned tasks and activities. This approach involves gathering all the required activities needed to complete a project and sorting them by duration and dependencies.

It tells us and the District what we must do and how to manage the project from start to finish. It describes every step in each project's life cycle in depth, so we know exactly which tasks to complete, when and how.

The division of project assignments into well-defined individual work plans, with specific tasks, improves visibility and control for the District and is an effective tool to mitigate the risks of internal and external impacts.

Point of Contact

Mitchell Christopher is the Managing Partner of MCG & Associates and will serve as the Project Manager for the District's Professional Development Consultation Services project. He will conduct and participate in all necessary status update conference calls or meetings necessary to maintain program integrity and cadence in partnership with the District. He will also be responsible for the management and performance of all MCG project personnel.

Mitchell's contact information is:

Mitchell Christopher
MCG & Associates
15030 Ventura Blvd, Ste. 301
Sherman Oaks, California 91403
310-503-2104
Mitchell@mcgassociates.net

CAPABILITIES

Communications

We have excellent communication and presentation skills and demonstrated ability to facilitate discussion among elected officials regarding multiple areas of interest. MCG & Associates has extensive experience working with government entities on strategic and professional development consulting projects. The communications process involves direct reporting, as well as structured procedures for the performance of each task and the mutual responsibilities for information exchange by the MCG and the District.

MCG will organize and provide the District Project Manager the following: weekly status update on all tasks by virtual meeting, phone, or in-person, and monthly meeting updates on the project progress with District staff at the direction of the Project Manager. Format and context will be discussed at the kick-off meeting with the Project Manager.

Availability

The MCG & Associates engagement team is based in Sherman Oaks, CA. We have the availability of personnel to perform the engagement's activities and tasks, onsite and remotely, as required by the Scope of Work. We are experienced in utilizing alternative communication formats and media to achieve project objectives. Alternate formats include online meetings, webinars and forums (Zoom, WebEx, etc.)

Additional Information

MCG & Associates (MCG) has the resources and commitment to complete all components of the project in a timely manner, including but not limited to: attending review meetings, if necessary; advising staff on matters specific to the employee and management development program; preparing all necessary documents; and assisting with the development of the in-house training program.

MCG is not currently involved in or affiliated with any entity or other consultants that might present a conflict of interest.

MCG is not in litigation adverse to the District or in other litigation, which may have significant and adverse impact on the ability to perform services for the District.

SECTION IV – COST SECTION

MCG & Associates is pleased to submit the following Cost Proposal for the District's Professional Development Consultation engagement. Our quote is a firm, fixed, fully-loaded hourly rate (or flat rate depending on the scope of work) for the services identified in Section IV Scope of Work. All costs associated with the services of this contract are identified on the Cost Sheet (Section VII). The hourly rate includes travel to and from the off-site workplace to the on-site workplace. Projected hours for completion of the project shall also be included. Additionally, include a fee schedule for possible additional services.

**SECTION VII
COST SHEET**

7.0 INTRODUCTION

Proposer shall complete cost sheet to include all costs, including travel and per diem in accordance with the Scope of Work defined in Section IV. Proposer will submit detailed cost sheets on reimbursable costs, as back up to this summary page; however, total costs must be reflected on this summary page.

Proposer shall also include a Fee Schedule for additional services that may be requested.

7.1 COST FOR SCOPE OF WORK, SECTION IV

a. Fee Schedule For Professional Development Services For Term Of Contract

Position	Hourly Rate		
	1 st Year	2 nd Year	3 rd Year
Project Manager	\$185.00	\$185.00	\$195.00
Principal Consultant	\$170.00	\$170.00	\$185.00

b. Identify costs cap as necessary.

Tasks assigned by the District will be performed by MCG & Associates at the hourly rate provided in 7.1a.

Professional development and customized training for work units (2-30 participants) - \$4,500.00.

This proposal submitted by: MCG & Associates
Company Name

Address: 15030 Ventura Blvd, Ste 301
Sherman Oaks, CA 91403

Telephone Number: (310) 503-2104

Fax Number: _____

Business License Number: _____

Contact Name: Mitchell Christopher

Authorized Signature: 

APPENDIX (RESUMES)

MITCHELL C. CHRISTOPHER
MCG & Associates
15030 Ventura Blvd., Ste 301
Sherman Oaks, CA 91403

SUMMARY

Mitchell is a highly experienced complex problem solver with an extensive record of project success and performance improvement. He has thirty-years of knowledge and experience specializing in project management, community engagement, technical workforce management and complex problem solving in multiple industry segments.

Mitchell Christopher received a Bachelor of Business Administration, Electrical Engineering Route to Business from The University of Texas at Austin and a Master of Business Administration from The University of Dallas. He also completed the Executive Leadership Development Program (ELDP), Joint program of National Association for Multi-Ethnicity in Communications (NAMIC) and the UCLA Anderson School of Management.

PROFESSIONAL EXPERIENCE

MCG & ASSOCIATES, Sherman Oaks, CA
Managing Partner

2014 - PRESENT

Manages the sales of management and operations consulting services and the delivery of strategic solutions and consulting services for the firm.

- Facilitated the development and implementation of strategic plans and operating policies for businesses and non-profits to achieve their short and long-term goals and objectives.
- Managed large (1000+) field technical workforces, including engineering design, construction, installation and service delivery, and network maintenance, serving Greater Los Angeles County and multiple facilities nationally.
- Developed and managed compliance programs to ensure that city, state, and national regulatory requirements were met and maintained.
- Negotiated and managed union agreements with technical and field-based labor workgroups.

TIME WARNER CABLE, El Segundo, CA
Vice President – Technical Operations

2006 to 2014

Responsible for the effective management of the field technical workforce, including engineering design, construction, installation and service delivery, and network maintenance, serving more than 1.3 million subscribers in Greater Los Angeles County.

BRINK'S HOME SECURITY, Irving, TX
Vice President - Technical Operations

1994 to 2006

Managed all field technical activities and functions, which included strategic operations planning, product development and direction of the field technical workforce.

EDUCATION

Master of Business Administration, University of Dallas, Irving, TX, 1995
Business Management.

Bachelor of Business Administration, The University of Texas at Austin, TX, 1979
Electrical Engineering Route to Business; Management major, Electrical Engineering minor.

PROFESSIONAL TRAINING

UCLA Anderson School of Management 2009-2010
NAMIC Executive Leadership Training Program

PROFESSIONAL AFFILIATIONS

National Fire Protection Association (NFPA) 2003-2006
Technical Committee on Single- and Multiple Station Alarms and Household Fire Systems
Principal Member, Installer/Maintainer Category

Underwriters Laboratories, Inc. (UL) 2003-2006
Standards Technical Panels (STP):
Voting Member, User Category

LICENSES

California Alarm Company Qualified Manager – ACQ 5751

PUBLICATIONS

Gottuk, D.T., Andrus, D.L., Aron, O., Ashley, E.M., Boyd, H.W., Brown, L., Christian, D.E., Christopher, M.C., Dallaire, L.J., David, M.E., Fraczkowski, E.M., Fuller, R.B., Lynch, J.L., Okun, J.L., Pacelli, J.R., Parssinen, J.L., Pecht, F.J., Ratzlaff, L., Savage, M.L., Schmid, R.P. (2006). Chapter 11, Single- and Multiple-Station Alarms and Household Fire Alarm Systems of NFPA 72, National Fire Alarm Code, In *2007 National Fire Alarm Code (NFPA 72)*.

MARLYN GARCIA
MCG & Associates
15030 Ventura Blvd., Ste 301
Sherman Oaks, CA 91403

SUMMARY

Managing Partner Marlyn Garcia’s extensive public relations and marketing background includes the oversight of planning and executing target segment product launches, advertising and promotional campaigns, and community outreach to multicultural communities.

She has performed a leadership role in executing public affairs strategies and community outreach that targeted customers, elected officials, and community-based organizations. Among the organizations she has supported are: Hispanas Organized for Political Equality (HOPE), Heart of Los Angeles Youth (HOLA), Salvadoran American Leadership Education Fund (SALEF), Salvation Army, East LA Youth Center, PUENTE Learning Center, Habitat for Humanity, Padres Contra El Cancer, Korean Youth Community Center, Asian Pacific Legal Aid, and the Chinese American Museum. Ms. Garcia was also selected to join US-based community and civic leaders to monitor the 2009 and 2013 presidential elections in El Salvador as part of international observer delegation with SALEF.

PROFESSIONAL EXPERIENCE

MCG & ASSOCIATES, Sherman Oaks, CA **2014 - PRESENT**
Managing Partner

Manage the delivery of strategic management and marketing solutions for the full-service consulting organization.

AT&T | DIRECTV, El Segundo, CA **2017 – 2019**
Director, Corporate Communications

Created and executed AT&T’s Mobility and Entertainment marketing communications plans to secure positive brand exposure of the company’s entertainment initiatives and product benefits.

DISH NETWORK | SLING, Englewood, CO **2015 – 2017**
General Manager, Marketing

Delivered ROI on \$90M budget with profitable customer acquisitions by designing sales-focused marketing programs that promoted competitive pricing and product benefits via relevant advertising.

ES ADVERTISING AGENCY, Los Angeles, CA **2013 – 2015**
Consultant Group Account Director

Led marketing communications strategy and execution plans for national advertising agency clients in the areas of creative, media placement, digital/social media, and public relations.

TIME WARNER CABLE, El Segundo, CA **2004 – 2013**
Marketing Director

Led the strategic planning and deployment of critical launches of new products and services by maximizing cross-functional department accountability that impacted how the company acquired and retained diverse audiences.

COMCAST COMMUNICATIONS, El Segundo, CA

2003 – 2004

Manager, Public Relations

Led the planning and execution of communications, public relations, and cause marketing programs to support brand perception, media coverage, corporate social responsibility, and customer acquisition.

ADDITIONAL RELEVANT EXPERIENCE

CHARO U.S. SMALL BUSINESS WOMEN’S CENTER, Los Angeles, CA

Business Development Officer

Developed partnership with U.S. Small Business Administration to serve as economic catalyst, providing business consulting and financial services for growth of diverse small business community.

PACE BUSINESS DEVELOPMENT CENTER, Los Angeles, CA

Marketing Manager

Managed operations of small business resource center, part of Mayor’s office community development dept., to advance economic development by providing tools to develop sustainable small businesses.

EDUCATION

PEPPERDINE UNIVERSITY, Los Angeles, CA

2020 - Present

Doctoral Candidate, Doctor of Philosophy in Organizational leadership (PhD)

PEPPERDINE UNIVERSITY, Los Angeles, CA

2017 - 2020

Doctor of Education in Organizational Leadership (EdD)

LOYOLA UNIVERSITY CHICAGO, Chicago, IL

2002 - 2003

Master of Business Administration (MBA)

LOYOLA MARYMOUNT UNIVERSITY, Los Angeles, CA

1999 - 2001

Bachelor of Business Administration (BA)

PROFESSIONAL TRAINING

UCLA Anderson School of Management

2012-2013

NAMIC Executive Leadership Training Program

LANGUAGES

Bilingual: English/Spanish

SHAWNA M. CHARLES, PH.D.
MCG & Associates
15030 Ventura Blvd., Ste 301
Sherman Oaks, CA 91403

SUMMARY

Dr. Shawna Charles has 15+ years' progressive experience, including organizational effectiveness and development, consumer and stakeholder engagement, internal and external affairs, and customer experience. Innovative & creative business consultant with development of key process improvement techniques. Perform effectively under high-pressure situations while maintaining highest ethical standards.

PROFESSIONAL EXPERIENCE

MCG & ASSOCIATES, Sherman Oaks, CA
Partner

2019 - Present

Provides support to clients to ensure a high-performance, client-oriented environment that supports the strategic communications goals, mission, and vision.

Information Xchange Group (IXG) PR, Los Angeles, CA
Principal

January 2019 – Present

Worked directly with clients to build strategic partnerships designed to give a competitive advantage and expand influence.

- Provides strategic stakeholder outreach utilizing media relations, message development and public relations activities.
- Explores collaborative partnership opportunities with community members, public agencies, nonprofit organizations, and corporations.
- Responsible for the delivery of a variety of projects related to Public Affairs, Executive Communications, and Internal Communications, with a strong focus on proactive, issues-based campaigns, segment-wide partnerships, and marketplace intelligence focused on protecting and strengthening the reputation of clients.
- Assist leadership in development and program management impacting community engagement strategy and plans.
- Promote advocacy and access by leading and participating in local advocacy creating awareness utilizing multichannel communications approach and creative storytelling.
- Assisted with communication plans to navigate crisis, protect brands, and educate stakeholders.

AT&T, Los Angeles, CA

October 2004 –March 2017

Associate Director - Employee Engagement

Evaluated existing engagement programs and policies and then infused HR concepts and business goals to draft forward thinking recommendations designed to advance the level of production for handling client relationship management, employee satisfaction, and to increase conflict resolutions skills.

- Managed cross-functional team throughout the department to devise and implement engagement initiatives.
- Reviewed creative work on the team including design, development, delivery, and strategic communication.
- Partnered with leadership to develop detailed communications and stakeholder engagement strategies to identify gaps in business processes. Drafted new protocols for improving productivity, service, and program delivery.
- Recognized in 2016 with the prestigious 'AT&T Service Award' for team employee engagement project.
- Drove engagement and collaboration to ensure all staff were working with clear vision of timeline and deliverables.
- SME providing coaching to front-line managers and supervisors as they transitioned their team.
- Worked with outside vendors to ensure deadlines were met per training and workflow prioritization plans.
- Analyzed root cause for issues affecting customer relationships; introduced solutions promoting swift resolution.
- Use KPIs to track internal performance to identify opportunities for advancing operational and service efficiencies.

EDUCATION

Ph.D., Clinical Psychology, Walden University, Minneapolis, MN

Master of International Business Administration, Nova Southeastern University, Fort Lauderdale, FL

BA, Human Communication Studies, Howard University, Washington, DC

AFFILIATIONS

California Psychological Association of Graduate Students	2012 - present
American Psychological Association of Graduate Students	2009 - present
AT&T Service Excellence Award Recipient	2016
Psi Chi Honor Society, National Honorary Society in Psychology	

Justin Flint
MCG & Associates
15030 Ventura Blvd., Ste 301
Sherman Oaks, CA 91403

SUMMARY

Justin Flint is a versatile administrator with extensive experience working in high-pressure environments, where strong problem-solving skills are a must. Strategic team builder with the ability to motivate personnel to maximize performance and meet tight deadlines without compromising quality. Skilled in creating innovative marketing plans and leading successful product launches, promotions, and development. Well-versed in video content production, social media audience engagement, and brand management.

PROFESSIONAL EXPERIENCE

MCG & ASSOCIATES, Sherman Oaks, CA **2021 - Present**
Associate

Develop and implement strategically designed programs for clients. Conduct project research and field-based activities.

Shepherd Sports, Porter Ranch, CA **2019 - Present**
Communications & Marketing Coordinator

- Effectively planned and oversaw multiple youth and adult sports programs.
- Recruited and trained volunteers to provide exceptional coaching and officiating services.
- Managed marketing strategies and advertising efforts for entire sports department.
- Oversaw entire online presence, including website copy, video content, and all social media platforms.
- Implemented tracking systems for departmental projects leading to increased efficiency.

Stephen Wise Temple, Bel Air, CA **2015 - 2018**
Communications Coordinator

- Implemented detailed marketing timelines and promotion campaigns to ensure the success of various organizational programs and events.
- Oversaw professional social media messaging through content development, follower engagement, social listening, and trend analysis.
- Directed successful SEO and link-building campaign to increase website's credibility and drive traffic.
- Drafted press releases supporting brand image and detailing relevant newsworthy information.
- Oversaw and adhered to departmental budget.

Keller Williams Realty, Encino, CA **2014 - 2016**
Real Estate Agent/Marketing Director

- Orchestrated and implemented re-branding of luxury listings department to improve sales and maximize effectiveness.
- Developed creative sales tools, including presentations, trend reports, and performance data sheets.
- Doubled website traffic and social media engagement using cutting-edge inbound marketing techniques.
- Built, implemented, and enhanced marketing initiatives to maximize outreach and produced 3 times goal of qualified leads.
- Conducted continuous evaluations of market trends to stay current on consumer and competitor changes.

The McDonald's Channel, Los Angeles, CA
Production Manager

2011 - 2014

- Created streamlined schedules and implemented daily workflows for entire post-production department to meet strict deadlines.
- Managed continuous improvement initiatives to drive gains in quality, consistency, and output.
- Collaborated with television networks, movie production studios, and record labels to acquire content and rights of use.
- Booked locations, obtained rental equipment, and generated call sheets and contact lists for talent and production crew.

EDUCATION

Bachelor of Arts, Psychology, California State University Northridge, Northridge, CA

2010



ALTADENA LIBRARY DISTRICT

**RESPONSE TO RFP FOR
PROFESSIONAL DEVELOPMENT CONSULTATION SERVICES**

Proposal Date: August 29, 2023

Submission Date: September 26, 2023

MCG & Associates

15030 Ventura Blvd., Ste. 301
Sherman Oaks, California 91403
310-503-2104

www.mcgassociates.net

**SECTION VII
COST SHEET**

7.0 INTRODUCTION

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Principal Consultant	\$170.00	\$170.00	\$185.00

b. Identify costs cap as necessary.

Tasks assigned by the District will be performed by MCG & Associates at the hourly rate provided in 7.1a.

Professional development and customized training for work units (2-30 participants) - \$4,500.00.

This proposal submitted by: MCG & Associates
Company Name

Address: 15030 Ventura Blvd, Ste 301
Sherman Oaks, CA 91403

Telephone Number: (310) 503-2104

Fax Number: _____

Business License Number: _____

Contact Name: Mitchell Christopher

Authorized Signature: 



PROPOSAL

Professional Development
Consultant Services

September 23, 2023





September 23, 2023

Nikki Winslow, District Director
Altadena Library District
600 E Mariposa St.
Altadena, CA 91001
Re: Proposal for Professional Development Consultation Services

Dear Ms. Winslow:

Thank you for the opportunity to present this proposal to the Altadena Library District for professional development consultation services. North Star Consulting has experience and skills that are ideally suited to supporting your goals of creating an environment of resiliency and growth among staff; fostering service-oriented goals within the District; and maintaining a high-quality professional development framework that fulfills the mission and vision of the library through the work of its employees.

North Star Consulting has reviewed and understands all elements of the request for proposals, including the terms and conditions of the Altadena Library District Professional Services Agreement, which we find acceptable, without exceptions.

This proposal highlights our experience helping organizations develop an engaged, high performing workforce through highly customized and measurable training and coaching programs. With North Star Consulting, you will work directly with me, the President. I bring more than 26 years of experience in this field, including working with the Altadena Library District and other public libraries.

I look forward to an opportunity to continue to support the Altadena Library District in this important work.

Respectfully,

Jennifer Coyle, President
North Star Consulting, Inc.
Jcoyle@northstarconsultinginc.com
(305) 389-4786

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SECTION I - EXPERIENCE

Company	North Star Consulting, Inc. 18120 SW 87 Court Miami, FL 33157 (305) 389-4786
Authorized representative	Jennifer Coyle, President Jcoyle@northstarconsultinginc.com
Years of experience	26

Proposer References

Client	Altadena Library District
Project Name	Professional Development Consulting
Location	Altadena, California

Scope of Work

- Provided employee training and coaching to district employees at all levels.
- Led management team alignment processes to maximize group effectiveness.
- Develop customized curriculum based on district needs.
- Led in person and virtual sessions on a group and individual basis.
- Supported District in recruitment strategies, candidate evaluation, interview preparation and participation.
- Developed and facilitated annual District-wide Professional Development Day.
- Developed and led Annual Retreat for ALD Board of Trustees
- Provided ad hoc coaching services for some ALD Board of Trustee members.
- Strategic advising for District Director.

Duration	2021-present
Contact	Nikki Winslow District Director Altadena Library District 600 E Mariposa St. Altadena, CA 91001 (626) 798-0833 x103 nwinslow@altadenalibrary.org

Client

City of Carlsbad, California

Project Name

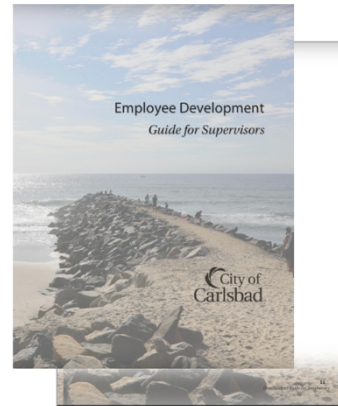
Professional Development Consulting

Location

Carlsbad, California

Scope of Work

- Developed and oversaw a professional development coaching program aimed at all levels of the organization.
- Provided coaching to executives, elected officials, managers and supervisors focused on specific, measurable performance and development objectives.
- Created train the trainer program to extend the reach of employee development efforts.
- Developed an employee development training curriculum, including presentations, handbooks, manuals, interactive exercises and follow up modules.
- Developed follow up reports with specific recommendations to further enhance employee development.
- Provided tailored trainings for specific departments, including Library & Cultural Arts, Communication & Engagement, Planning, Building, Utilities, and Parks & Recreation.
- Provide coaching and leadership alignment on an as needed basis for departments and the city's Leadership Team.
- Developed and managed employee engagement initiative that resulted a 20+% increase in engagement metrics across all departments of city organization.



Duration

2013-present

Contact

Judy Von Kalinowski, HR Director
 City of Carlsbad
 1635 Faraday Ave.
 Carlsbad, CA 92008

760-473-4670

Judy.VonKalinowski@carlsbadca.gov

Client

City of San Marcos, California

Project Name

Organizational Development

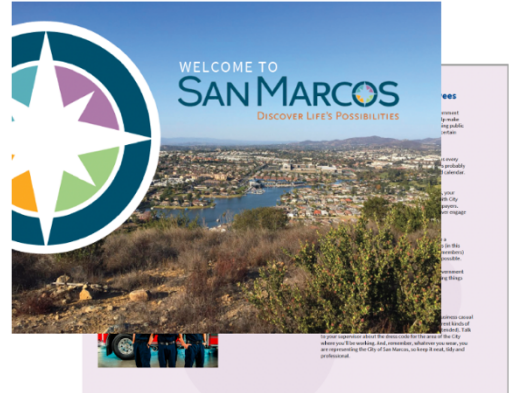
Location

San Marcos, California

Scope of Work

Work with the city's executive and management teams to develop and implement a wide range of organizational development initiatives, including:

- Developed a citywide onboarding program for new employees.
- Produced checklists, supervisor scripts, manuals and an employee welcome brochure.
- Worked with the city's Leadership Team, which had several new members, to become an aligned, high performing and development-oriented team.
- Developed a new performance management system for directors and supported its implementation.
- Provide one-on-one coaching for directors.
- Provide coaching and training for team members at all levels of the organization.
- Provide strategic council to City Manager.
- Led process improvement initiatives for multiple departments.
- Evaluated city's service delivery, customized training to elevate stakeholder experience, developed metrics and tracked service delivery over time.
- Led an update to the organization's mission, vision and values.
- Conducted team building, leveraging personality profiles (e.g., Myers-Briggs).



Duration

2017-present

Contact

Michelle Bender, City Manager
City of San Marcos
1 Civic Center Drive
San Marcos, CA, 92069

760-744-1050, ext. 3134
MBender@san-marcos.net

Client

University of Georgia

Project Name

Professional Development and Training

Location

Athens, Georgia

Scope of Work

- Sales and Service Training for the Georgia Center for Continuing Education at the University of GA.
- Provide leadership and service training for the Center's leadership team.
- Provide ongoing sales and service training for frontline staff. Conduct monthly mystery shops and performance coaching.



Duration

2009-present

Contact

Bill Bradberry, Conference Center General Manager
University of Georgia
Athens, GA 30602

(706) 542-6323

bill.bradberry@georgiacenter.uga.edu

Client

Western Municipal Water District

Project Name

Team Development and Customer Experience Consulting

Location

Riverside, California

Scope of Work

- Provided coaching to leadership and middle managers to support professional development goals.
- Developed program to support employees through department restructuring.
- Developed and delivered training program for customer experience team.
- Provided process improvement training to new external relations department.



Duration

2021-present

Contact

Sarah MacDonald, Assistant General Manager
Western Municipal Water District
14205 Meridian Parkway
Riverside, CA 92518

(951) 571-7211

smacdonald@wmwd.com

Professional Development licenses/certifications

- B.A - Georgetown University
- MS Ed. in Training & Development - Florida International University
- Lean/Six Sigma Black Belt
- MBTI/MMTIC Master Practitioner
- Diversity & Inclusion – ESSEC Business School
- Quality Service Expert - Disney
- Innovation – Northwestern/Kellogg School of Management
- Certified Professional Coach – University of Miami
- Executive Coaching Certificate – Harvard University
- Coaching Mastery Certification – Accelerating Coach Excellence
- Journey to Mastery Facilitator/Virtuoso Coach – Develop senior business coaches at the global level
- International Coaching Federation – Professional Certified Coach

Disciplinary actions, administrative proceedings, malpractice claims: None

SECTION II - PERSONNEL

Jennifer Coyle, Project Manager

Location: 50% Miami/50% Southern California

North Star Consulting's founder, Jennifer Coyle, began her career in the hospitality field, managing all aspects of customer relationship management for some of the top names in the industry, including InterContinental Hotels, Doubletree, and the exclusive Fairmont, Ritz and Doral hotel brands.

Learning how to provide excellent customer service in a complex and dynamic operational environment became her passion.

After parlaying this experience as a successful industry consultant working with some of the most exclusive five-star properties in the world, Jennifer had a thought: Wouldn't all organizations benefit from a commitment to excellent customer service?

From this foundation, Jennifer has built custom training and development curricula with application to a wide variety of industries that depend on effective teamwork, customer trust and client satisfaction.

Jennifer's approach focuses on working collaboratively with her clients to achieve outcomes that are measurable and sustainable.

Prior to founding North Star Consulting, Jennifer spent over a decade as vice president of training and curriculum development for an international consulting business. In this role, she developed and delivered classes worldwide, with a focus on hotels, resorts, restaurants and cruise lines.

Jennifer holds a bachelor's degree from Georgetown University, a master's degree from Florida International University in training and development and is one of the founding faculty members of the Center for Service Excellence at Miami Dade College. Jennifer is skilled in both MBTI and DiSC instruments and holds a certification in customer service from the Disney Institute. Jennifer also earned a Black Belt in Six Sigma and has completed executive level training through the prestigious Stanford Executive Program and Kellogg School of Management.

Jennifer will serve as the main point of contact and project manager.

SECTION III - QUALIFICATIONS

North Star Consulting, Inc., specializes in helping organizations reach peak performance through highly customized training, coaching and leadership alignment initiatives for a wide range of organizations:

- Municipal agencies
- Special districts
- Hospitality
- Healthcare
- Real estate development
- University
- Call centers
- Entertainment

North Star Consulting takes a highly individualized approach to professional development training based on an in-depth understanding of its clients' goals, circumstances and challenges.

Key services

- Performance improvement initiatives
- Executive coaching & consulting
- Staff development
- Team alignment/conflict management
- Onboarding program design and implementation
- Process improvement
- Organizational development
- Leadership advising
- Customer service training

Requirements

- a. North Star Consulting has the capacity and availability to successfully execute the scope of work in addition to related services that may be required to support the District's employee development goals. This includes attending review meetings in person or virtually; advising staff on matters specific to the employee and management development program; preparing all necessary documents; and assisting with the development of the in-house training program.
- b. North Star Consulting is not currently involved in or affiliated with any entity or other consultants that might present a conflict of interest.
- c. North Star Consulting is not in litigation adverse to the District or in other litigation, which may have significant and adverse impact on the ability to perform services for the District.

- d. North Star Consulting has more than five (5) years of experience in providing consulting services related to, but not limited to, employee training and development and curriculum development with agencies comparable to the District.

Understanding of the Scope of Work

North Star Consulting has more than 26 years of professional experience providing employee development services, including coaching staff and officials at all levels.

Our approach to the scope of work involves the following steps:

Training objectives/measurable results

Effective training programs start with clear, measurable objectives. North Star will work with District leadership and supervisors to identify objectives for each training and coaching initiative as well as appropriate performance indicators.

Flexible formats

Employee development is not one size fits all. North Star will customize each training initiative based on the participants, such as technological, supervisory and leadership staff. Trainings may be delivered one-on-one, in small groups and other formats that best meet the learning objectives.

Custom content

Specific curricula will be created to include a range of topics, such as: clarifying work performance expectations; importance of communicating clearly; addressing difficult conversations; and performing leadership assessments and coaching.

Coaching program

North Star will develop a strong coaching program that provides the necessary tools and assists the managers and District Director to maximize their leadership effectiveness. Elements of an effective coaching program include establishing clear objectives, providing structure and support needed for each employee to excel, and frequent feedback to mark progress.

Individual Professional Development Program

With extensive experience designing and executing individual development plan initiatives, North Star will help maximize the effectiveness of the District's existing program by equipping participants with skills, tools, and ideas to support their professional development.

Train the trainer

When appropriate, North Star will support the District with train the trainer programs to maximize internal development opportunities. Successful train the trainer programs require a careful assessment of staff skills and availability, followed by coaching and training, feedback and refinement efforts.

Performance evaluation

North Star Consulting has developed successful performance evaluation processes for a variety of public agencies, utilizing proven approaches for ongoing employee feedback, collaborative goal setting and clear measures of success. Working with District leadership, North Star will create customized performance evaluation tools and processes for all job classifications.

As needed services

North Star Consulting is available to develop classroom-style and e-learning customized training modules on specific topics such as: leadership development, effective communication (written and verbal), coaching and mentoring, human resources management, quality customer service, safety and risk management, succession planning, conflict resolution, problem solving/decision making, stress management, team building, and career and professional development.

Customized course curricula and training materials will be developed with input from District leadership.

SECTION IV - COST SECTION

COST SHEET

Hourly Rate

Position	Year 1	Year 2	Year 3
Principal in charge	\$300	\$325	\$350

Training Rates:

Virtual training/e-learning

- ½ day training fee \$2,400
- Full day training fee \$4,800

In person training

- ½ day training, fully loaded* \$3,500
- Full day training fee, fully loaded* \$6,300

*In person training fees are fully loaded and will not involve any travel-related costs.

Fee Schedule For Professional Development Services For Term of Contract

The following is a sample budget for year 1. The total cost is an estimate predicated on assumptions. If selected for this work, North Star Consulting will work with the Director to determine specific needs so that the contract amount can align with District expectations and needs.

Estimated Budget

	Hours	Rate*	Total
Training objectives/measurable results			
Work with district leadership to develop measurable objectives for the overall training program.	3	\$300	\$900.00
Customized small group in-person training development			
Develop up to two, 3-4 hour customized trainings on topics to be determined by District leadership. Trainings will be designed for a virtual format and intended for small groups	6	\$300	\$1,800.00

Estimated Budget

ranging in size from 3-10 (Management Team, Board of Trustees, etc.)

	Hours	Rate*	Total
Customized large group training development			
Develop up to two 3-4 hour customized trainings on topics to be determined by District leadership. Trainings will be designed for an in person format and intended for larger groups (up to 35-40 participants)	6	\$300	\$1,800.00
Training Delivery			
Half day in person training delivery (fully burdened)	n/a	\$3,500**	\$7,000.00
Full day in person training delivery (fully burdened)	n/a	\$6,300**	
Half day virtual training delivery	n/a	\$2,400**	\$4,800.00
Full day virtual training delivery	n/a	\$4,800**	
Coaching program			
Develop and implement a coaching program that includes discovery sessions, development of measurable objectives and up to 2 hours per person of virtual coaching each month for 6-12 months. Cost is for three employees.	48	\$300	\$14,400.00
Individual Professional Development Program			
Develop and implement an individual professional development program focused on goal setting, measurement, skill building and employee empowerment. (Year 2 task)			
Train the trainer			
Develop a train the trainer program for one of the training programs developed as part of this scope of work. Coach up to 2 employees to implement the selected training within the organization.	n/a	\$2,500**	\$2,500.00

Estimated Budget

Hours Rate* Total

Performance evaluation

Work with District leadership to develop a performance evaluation process that includes standardized benchmarks as well as benchmarks that can tailored to each position. Tools will include performance management discussion guides, development planning worksheets, feedback worksheets and annual evaluation templates. Task includes a roll out of the new process and up to two trainings for supervisors.

n/a \$12,000** \$12,000.00

As needed services

North Star Consulting is available to develop classroom-style and e-learning customized training modules on specific topics such as: leadership development, effective communication, (written and verbal), coaching and mentoring, human resources management, quality customer service, safety and risk management, succession planning, conflict resolution, problem solving/decision making, stress management, team building, and career and professional development. **Cost provided upon request.**

Optional services

North Star Consulting is available to provide additional organizational development services, such as candidate screening, new employee onboarding programs, leadership alignment and team alignment workshops and related tasks. These services would be billed at the provided hourly rate or fully burdened training rate, depending on the task.

Total Est. Year 1 Cost

**Sample budget above reflects year one rates*

\$45,200.00

*** Flat fee*

b. Identify costs cap as necessary.

n/a

This proposal submitted by	North Star Consulting, Inc.
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