



**PROPOSAL # 1235  
EMPLOYEE UNIVERSITY TRAINING AND  
DEVELOPMENT CONSULTANT**

October 24, 2013

Prepared by:

THE CENTRE  
 FOR ORGANIZATION  
EFFECTIVENESS

**Project Title:** Employee University Training and Development Consultant

**Applicant or Firm Name:** The Centre for Organization Effectiveness

**Firm Qualifications**

a. Type of organization, size, professional registration and affiliations.

The Centre for Organization Effectiveness is an innovative and exciting “one-stop shop” concept, offering leadership development, organization development, and specialized training programs to public sector and non-profit organizations and agencies. Our vision is to inspire excellence in leaders and organizations through academies, forums and seminars, facilitation and consulting services. The Centre is poised to deliver the Employee University Training and Development efforts for the County of San Luis Obispo as a unique and effective format.

The Centre was established in 1993 under the City of San Diego, and recreated in 2001 as a California Joint Powers Authority by the City of San Diego and the San Diego County Water Authority.

The agreement creates a “central entity...for the purpose of providing academies, forums and seminars, and facilitation and consulting services, management development, organization development and training to municipalities, municipal agencies, special districts and nonprofit organizations, all to raise the caliber of leadership in these organizations.” One of the benefits of working with The Centre is the wide range of experience and knowledge of best practices that our consultants bring to every project. Our cadre of over 150 consultants specializes in public sector change efforts, with specific and extensive experience in the successful creation, implementation and delivery of leadership development academies and programs for executives, managers and supervisors.

The Centre has been working within the local government environment for the last 20 years. The Centre has received local and national awards from the San Diego Business Journal, California League of Cities, and the National Center for Public Productivity at Rutgers University. We have provided services to all levels of government and types of government agencies. The consultants designated for this project have decades of experience in the design and facilitation of development programs for all levels of employees, organization development interventions, teambuilding facilitation, ethics training and customization, survey and interview design, employee engagement initiatives, and change management efforts.

b. Names and qualifications of personnel to be assigned to this project.

Most of our consulting staff is Ph.D. trained or Masters-degree trained. The only exceptions are consultants with decades of hands on leadership experience within the public sector (i.e. retired City Manager, Chief Administration Officer, etc.) or those with specific subject matter expertise necessary for a particular topic. Consultant backgrounds range from industrial/organizational psychology, clinical psychology, sociology, marriage and family counseling, and clinical social work.

Consultants on this project include, but are not limited to:

- Karen Oakes, Ph.D.
- Dick Bowers, M.P.A., former City Manager
- Connie Weiss, Ph.D., BCC
- Sommer Kehrli, Ph.D., BCC
- Kathryn Rippey, M.S., BCC
- Trudy Sopp, Ph.D.
- Keren Stashower, M.S.W., BCC
- Gary Winters
- Joyce Pardieu, Ph.D.
- Judy Kaplan Baron, Ph.D.

We have long-standing successful working relationships with each of the consultants selected for this program.

- c. Outline of recent projects completed that are directly related to this project. Consultant is required to demonstrate specific design and project expertise relating to the requirements of the Project Scope.

**Project #1: Napa County**

**Project summary:** In 2011, Napa County embarked on three-phased leadership development to include supervisor, manager, and executive-level development. The multi-level programs include the use of various instruments and development tools including a 360-degree assessment, coaching, and Leadership Development Plans.

**Project #2: City of Newport Beach Leadership Academy**

**Project summary:** In May 2013, The Centre designed and facilitated a Leadership Development Academy for 24 participants, which included six days of modules and a 360-degree Competency Instrument.

**Project #3: CalSTRS Executive Development Program**

**Project summary:** The Centre provides as-needed coaching services, training, and organizational development support to a number of organizations throughout the State of California. CalSTRS has utilized the services of The Centre since 2006. In addition to formal training through leadership academies delivered by The Centre, one-on-one coaching services for management and supervisory employees have been provided and organization development planning and interventions, including change management assistance. One of the recently designed programs includes the Executive Development Program, which is a ten-day program spanned over 18 months and includes several 1:1 coaching sessions, project support, and several assessments and books.

**Project #4: California Department of Consumer Affairs Management Academy**

**Project summary:** Beginning in 2008, The Centre developed and delivered an eight-day extensive integrated leadership development program for California State Department of Consumer Affairs. The participants took a customized 360-degree feedback instrument designed by The Centre. As executives received feedback from their 360-degree Competency Instrument and were exposed to

new ideas and concepts, coaching on their management practices and leadership styles were provided on an as-requested basis.

**Project #5: CALAPRS Management Academy**

**Project summary:** The Centre designed and delivered a four-day Management Academy for the consortium of public sector retirement agencies that belong to CALAPRS. Topics included: Being an Effective Manager; Strategic Thinking & Planning; Customer Service; Decision Making & Involvement; Effective Influence Skills; Ethical Dilemmas, Building Effective Teams; Managing Change; Performance Management; Influence Skills and Managing Intergenerational Differences. The Academy was initially delivered in 2008 as a pilot. Based upon participant and client member feedback, an expanded six-day Academy was developed and delivered in 2009 and beyond.

**Project #6: Bureau of Forensic Sciences, Department of Justice**

**Project summary:** In 2007, The Centre presented a five-day Supervisory Academy for future supervisors of the Bureau of Forensic Services, Department of Justice. The program ran five days, eight hours per day for 20 participants. Classes included instruction, planning, design, training materials and certificates for all students. The Centre also presented a three-day Supervisory Academy for the Bureau in June 2012, which included a component from the START program as well as components from the Supervisory Academy.

- d. Qualifications of consultants, subcontractors, or joint venture firm, if appropriate.

See above response to question 3a.

- e. Client references from recent related projects, including name, address and phone number of individual to contact for referral.

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**Bureau of Forensic Sciences**

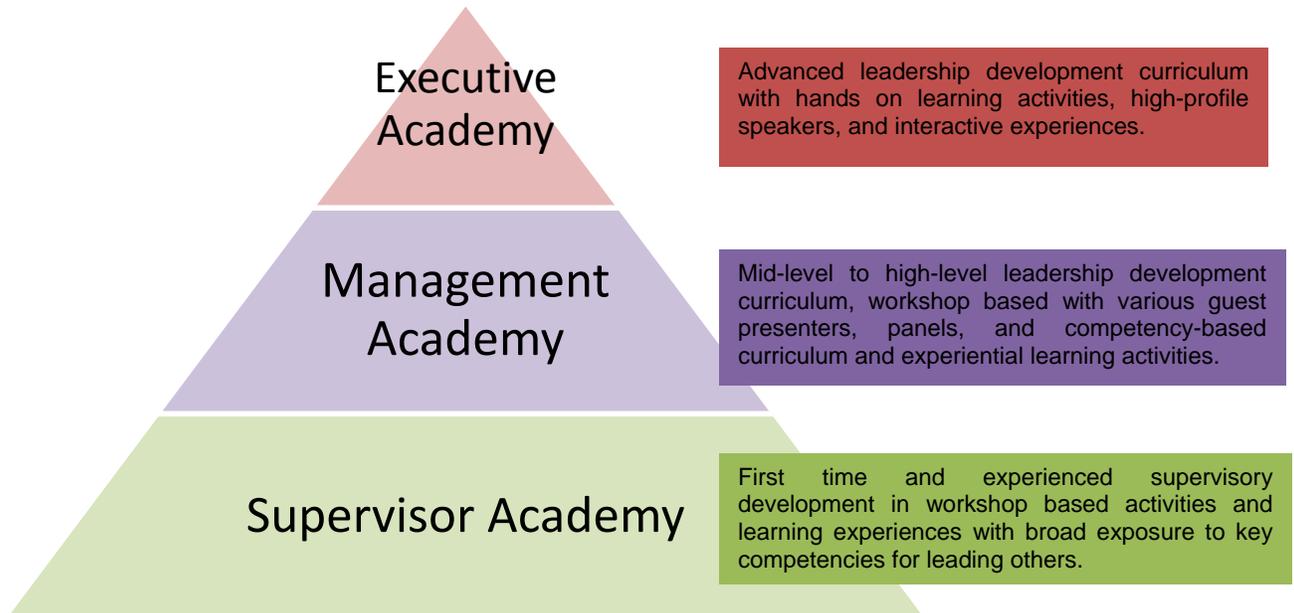
Jonathan Woodson  
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4. Understanding of and Approach to the Project

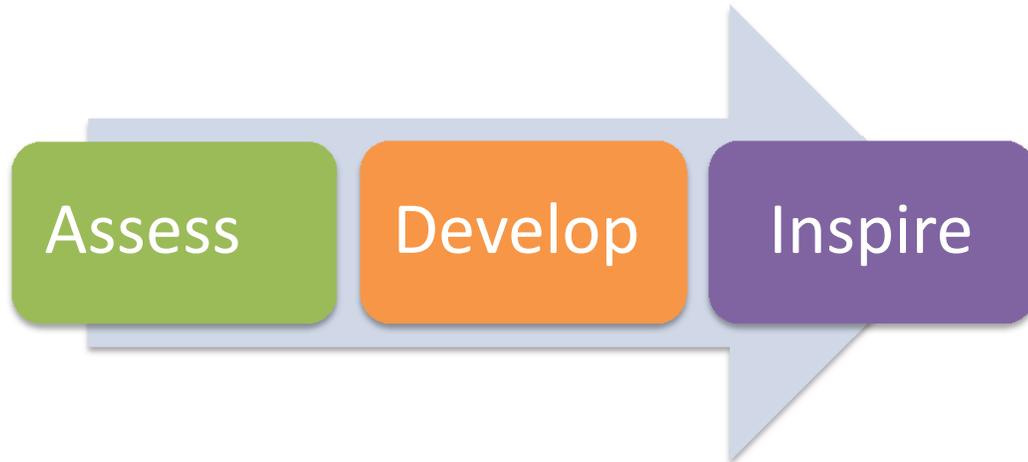
a. Summary of approach to be taken.

The County of San Luis Obispo is seeking to obtain expert consultation on program development and course initiatives for a sustainable and contemporary progressive leadership academy building supervisory, managerial, and executive level skills. The Centre has designed and delivered, over many years, multi-level development academies including the Professional Assistants Academy, Supervisors Transition and Readiness Training (S.T.A.R.T), Supervisors Academy, Public Management Academy, the Certified Public Manager® Program, and various Executive level programs. These programs are regularly offered in an open-enrollment format as well as customized for our clients to be delivered internally.

**Three-Tiered Leadership Development Model**



In delivering each of the academy programs, The Centre for Organization Effectiveness utilizes a three-phased approach as shown below:



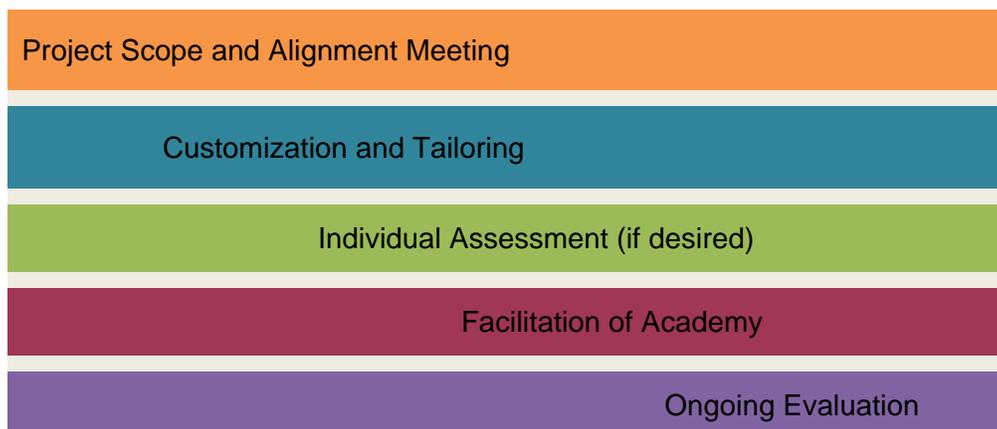
The first step, **Assess**, provides the foundation for the program. Not only are program participants assessed on public sector competencies, but the competencies also inform the design of the program.

The second step, **Develop**, makes up the bulk of the academy and consists of all efforts to assist the participants in gaining and growing their skills and rounding out their capabilities on the key competencies.

The third and final step, **Inspire**, is critical to the application of lessons learned and ensuring the impact of the program is experienced within the organization. The learning does not stop when the program ends and this final step is designed to support ongoing collaboration and integration.

### **The Centre's Academy Design and Delivery Process**

The Centre follows a proven methodology to engage the organization in the process of selecting the content for the Academy and tailoring the program to meet the development needs of the organization. We also assist with all of the details to make this program a success. Below are the five steps we utilize to organize and perform these services.



### **Step One: Project Scope and Alignment Meeting**

The initial client meeting provides an opportunity to establish scope, confirm internal experts and resources, establish dates and milestones, and clarify roles. Key stakeholders are identified as well as potential guest speakers.

### **Step Two: Customization and Tailoring**

The program content is reviewed and the client assists with selecting which content modules, speakers, and assessments will meet the needs of the participants. The Centre facilitator and speakers customize the content to fit the client's culture and the specific audience. The Centre facilitator works closely with internal staff to align content. Examples might include inserting samples of the client's performance evaluation templates in the module on performance management and coaching.

The Centre facilitator coordinates this effort and briefs the consultants so that the content and delivery of materials flow seamlessly.

### **Step Three: Individual Assessment**

The Competency Instrument is given to participants before the start of the first session to provide them with a foundation from which to focus from throughout the program. It is usually debriefed within the first two weeks of the program. In addition, other assessments are embedded in our development programs. These assessments are selected during the project scope and alignment meeting.

### **Step Four: Facilitation of Academy**

Each of our leadership development programs is fully coordinated and supported by The Centre staff and the facilitator. This includes scheduling presenters and guest speakers, coordinating panel discussions (if applicable), briefing presenters, guest speakers, panel participants and experts, assembling participant materials and shipping them, coordinating logistics with assessments, and setting up the training space with an inviting atmosphere that is conducive to learning.

Creating an inclusive and inviting learning environment, utilizing credible and dynamic speakers, and engaging participants in the learning are all hallmarks of The Centre's success.

### **Step Five: Ongoing Evaluation**

Each session is evaluated by participants, staff, and speakers. The feedback received guides decisions about improvements to future sessions. The Centre relies heavily on evaluation feedback to validate content and methodology.

The Centre facilitator uses the feedback to continuously meet and exceed expectations and also serves as a project manager, ensuring the program elements are executed seamlessly.

## Academy Components

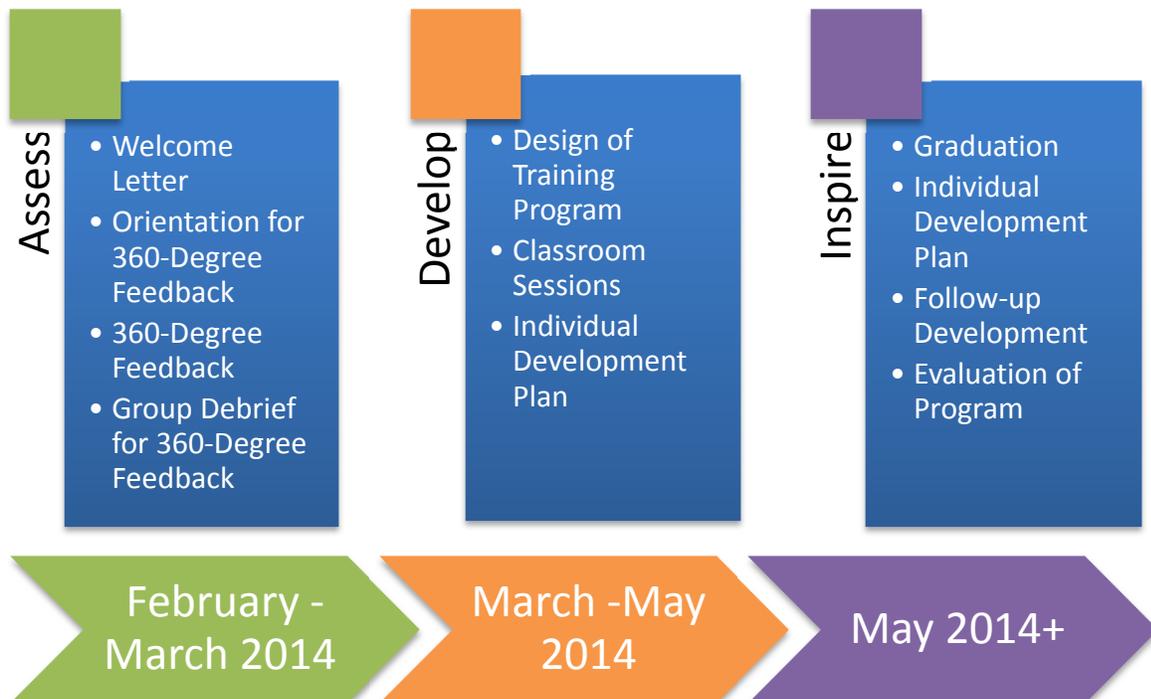
We frequently partner with organizations to design and deliver supervisor, management, and leadership development programs very similar to what the County of San Luis Obispo has outlined and requested. As stated previously, there are three phases to our academies:



In carrying out the phases of the program outlined, the following actions will take place:

1. **Assess:** Welcome participants into the program, and identify specific areas for development as well as key performance factors (strengths and strong capabilities).
2. **Develop:** Initiate key components of the program including development sessions, group projects, individual development plans, and additional assessments.
3. **Inspire:** Applying the skills and knowledge back in the workplace through ongoing individual development planning and continued collaboration.

The following diagram outlines the three components of the Academy and provides the basis for the curriculum outline and other program details. We've included a sample timeline for one Academy to showcase how it would occur over several months.



As you peruse our background and qualifications and see our long history with several governmental entities, please note that this work always starts with a conversation about what the organization is trying to accomplish and how our partnership and contribution will help the organization reach its goals. As such, we will meet with our internal partners at the County of San Luis Obispo to ensure the program is designed in a way that will meet the needs of the participants while reaching the goals of the County of San Luis Obispo.

Various Centre consultants, based upon content expertise, as well as a facilitator for consistency, will lead the sessions. The Centre has found tremendous success in having a facilitator guide the entire development process in order to build accountability in transferring the classroom learning back on the job and to help participants make connections between the topics and their personal development. The facilitator is present at each session.

The Centre has consistently and successfully delivered similar programs multiple times per year for the past 20 years. Throughout each of our Academies, there is a reference back to the competencies for each training topic. Application activities and case studies are used during each module to create the best environment for adult learning and exploration.

### **Competency Instrument (360-Degree Assessment)**

In most organizations, the establishment of leadership competencies serves multiple purposes. The “best practice” is to apply and integrate these job performance success factors, or competencies, across human resource systems and leadership development efforts.

The Centre has established a set of 17 well-validated, public sector leadership competencies. The 84-item questionnaire assesses a manager's current level of performance on 17 competencies, which have been judged critical to excellent performance at executive levels of leadership and management in the public sector. Thousands of public sector managers have taken The Centre's Competency Instrument. Additionally, The Centre regularly customizes Competency Instruments for client organizations, utilizing our online platform and report format. Most recently The Centre created a Competency Instrument for the San Diego County Water Authority and the Department of Consumer Affairs to assess leader performance on their specifically established competencies.

## **The Competency Instrument Process**



**Step One:** In order to create, implement and effectively use a Competency Instrument, there is a standard series of activities that typically occur. First and foremost is the establishment of guidelines that indicate how the information will be used, who will have access and how long the data will be considered valid. This is a simple activity, yet requires depth of thought to best meet the organizational desire for aggregate data and the individual's need to use this information for their own leadership development planning. Also, orientation sessions are helpful to ensure the participants (targets) and their raters understand the purpose of the assessment and understand the technology and due dates.

**Step Two:** Another key activity is the selection of the Raters. Typically, the participant is asked to include themselves, their boss, at least three peers, at least three direct reports and any others. Determination of how the raters will be selected is part of the ongoing planning between the consultants and the internal team.

The Centre's Competency Instrument is administered online and thus, it is possible to send automated reminder notes to those who have not yet responded. This feature increases the response rate, which is important to provide a broad and balanced perspective to the individual.

**Step Three:** Providing survey feedback is an essential component of the 360-degree assessment process. Centre consultants have a successful track record of providing feedback to literally thousands of public sector managers and leaders using our own validated Competency Instrument. Participants will take part in a group debrief where they will receive their report and understand the format and the data. They will then create an individual development plan and carry this through the academy.

Each participant receives **an individualized report**, which contains the following:

- A summary of all responses sorted by Rater Group
- A Competency Profile radar chart with scores for each rating group across all competencies
- A Competency Summary with scores for each competency group by Rater Group
- A verbatim report of open-ended comments by Rater Group

Additionally, an **aggregate report** will be provided to the County of San Luis Obispo to assist in planning and designing the academies as well as any additional development efforts.

### **Individual Development Plan**

The development of an Individual Leadership Development Plan is an important part of any individual's roadmap to success. Development plans have historically focused on bringing a person's weaknesses up to the level of their strengths or to an organizational standard. One traditional limitation of development plans is that they have been overly reliant on the incumbent defining areas for improvement. This typically results in a default to taking classes, yet the transfer of training is very difficult.

Current thinking involves a multifaceted approach to development. For example, several Centre clients have Leadership Development Programs that include required coursework, elective coursework, action reflection learning teams and projects, job assignments to gain new skills, mentorship components, access to executive leadership, and committee assignments.

The value of the actual development plan is to provide a roadmap and intention to move forward. In addition, the plan is a conversational tool between the employee and his/her supervisor (and/or mentor) that can work hand-in-hand with career paths, employee career interests, and organizational needs.

### **Group Project and Peer Learning Group**

An additional option for the program is the designation of group projects and peer learning groups. If this is desired, individuals will be assigned to a peer learning group, which is designed to provide an opportunity to engage with peers and continue to discuss and apply the topics covered in the sessions. The peer learning group can also complete a Group Project. The Project is an opportunity to integrate skills, abilities and competencies gained through the course of the program with real issues within the workplace. Joining theory and practical application benefits the participants as well as the organization. Each group can identify an organizational challenge to address, a change to implement, or a best practice to examine. Every effort is made to ensure the participants can utilize efforts they are already using in their everyday work. The goal is to provide an opportunity to apply what they are learning in the classroom.

The goals of the peer learning meetings include:

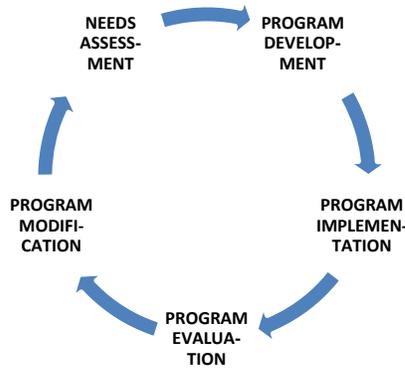
- Create a supportive learning environment for the participants to be able to feel free to speak their thoughts, ideas, and concerns
- Foster networking, relationship building, and awareness of others
- Provide an opportunity to apply what is learned in the classroom to the work being done around their department or work area

Typically, the group project is submitted to the program facilitator as a written document and is also presented to the group and guests at the graduation celebration. Peer group members provide each other with feedback. The facilitator also completes a formal assessment of both the content of the project and the presentation style.

### **Project Management and Evaluation Methods**

The Program Facilitator/Project Manager will meet with the internal team at the County of San Luis Obispo to ensure the program is on track. There will be a report created to provide updates on program progress. The Program Facilitator will ensure all consultants, facilitators, and instructors are briefed on the program and provided with parameters for their session. All program staff will receive feedback on their sessions and interactions and adjust accordingly.

Additionally, The Centre has used a continuous improvement model that is designed to continually refine and adjust program elements to best meet the needs of the participants.



Programs are modified with formal quantitative and qualitative data; slight changes in learning objectives and course materials are made each time the program is offered. In the same way, each element of the program is evaluated as it is implemented and modified when appropriate.

There will be a session evaluation completed by participants after each session is completed. The program will also have an overall evaluation completed after the last session.

**Academy Outlines**

The County of San Luis Obispo is looking to implement academies at the supervisor, manager, and executive leadership level. During the initial and ongoing planning activities, one of the key issues is to agree on the expectations and key goals of each of the academies. There are several approaches that can be used. We recommend using our pre-developed Academies and including the 360-degree Competency Instrument in the manager and executive leadership level programs. It is our belief that starting with a strong curriculum, with a documented and proven track record over decades will work best for the County of San Luis Obispo.

We have hundreds of examples where Centre consultants have assisted clients in sequencing a logical and realistic timeline and implementation plan. We believe that both strategic and tactical issues should be considered. For example, if the organization has not completed its annual Work Plan/Budget process, it is difficult to deliver training content asking the participants to develop Department goals that align strategically. Tactical issues such as scheduling, involving key leaders, writing policy for a mentoring program should be done in tandem with the development of each component in the Scope of Services. All of this is considered as we work with the internal partners to construct an implementation plan.

As a public agency, we understand and appreciate the needs of Cities, Counties and other government agencies. Our approach builds pride and engagement from employees, while management learns effective strategy, change management, human resource development and stewardship.

The Centre’s comprehensive leadership programs are comprised of varying combinations of courses and curriculum. The content is designed to match the level and skills needed for each client. We are proud to say that our curriculum is compliant with the State’s required Supervisory Training Mandates.

The delivery of Leadership Academies is The Centre's most successful service. Our Academies are unique in that they continuously bring forward the latest issues and challenges for public servants. While the content modules are plentiful to select from, most clients align the training content with the competencies needed for successful current and future leadership requirements.

We determine our "proven history of successful implementation" using multiple quantitative and qualitative metrics such as number of participants enrolled, number of organizations and agencies that repeatedly send participants, participant evaluation ratings of each module, adaptation of a public program to an internally branded and customized program, and other factors such as the skills demonstrated on the job after training and overall organizational impact. Our consultants will work with County of San Luis Obispo to establish "measures of successful implementation".

Several examples of our pre-developed programs are listed and described here.

### The **Public Management Academy**

Our most popular and long running Public Management Academy is comprised of the following topics/modules:

- "Leadership"
- "Strategic Thinking and Strategic Planning"
- "Effective Community/Public Meetings"
- "Issues Facing Leaders Today"
- "Strengths-Based Leadership"
- "Ethics and Ethical Decision-making"
- "Managing Changes and Trends"
- "Risk-taking and Innovation"
- "Influencing Others: Understanding Power and Politics"
- "Building A High Performing Team"
- "Staying Alive During Challenging Times: Building Resilience"
- "Managing Conflict Constructively"
- "Decision-making and Decisiveness"
- "Career Management"
- "Effective Presentation Skills"
- "Cultural Awareness: A Focus on Generational Differences and Gender Communication"

This Academy is eight days long and The Centre has consistently and successfully delivered it multiple times per year for the past 20 years. Throughout the Academy, there is reference back to the competencies for each training topic. Application activities and case studies are used during each module to create the best environment for adult learning and exploration. The Management Academy training is compliant with time requirements and topics outlined in Government Code Section 19995.4. This program qualifies for 6 Continuing Education Units (CEUs) through our alliance with UC San Diego.

### **Certified Public Manager Program (CPM)**

The Centre has earned the distinction of being the only organization in California that is approved to designate public managers as Certified Public Manager (CPM), accredited by

the American Academy of Certified Public Managers. CPM extends the learning of the Public Management Academy into a graduate-level program, which is considered to be a senior leadership program, and has a higher standard, time commitment and more strategic learning objectives. CPM is designed to be intensive, competency-based and managers and leaders to respond to complexities of highly charged political environment of public service.

CPM is comprised of six, two-day modules with nationally-recognized, public sector-focused, seasoned practitioners as speakers and faculty. Unique content delivered in CPM includes:

- “Planning to Learn: Community Building, Networking, and Goal Setting
- “Committing to Public Service”
- “Avatars, Blogs, and Wikis, Oh My!: How Web 2.0 is Transforming Government”
- “Emotional Intelligence – Understanding Self, Managing Self, Understanding Others, and Managing Relationships”
- “Applying Systems and Political Sensitivities to Solve Organizational Problems”
- “Developing a Service Oriented Culture”
- “Building, Rebuilding, and Sustaining Trust”
- “Complying with Public Sector Laws Related to Organizational Functioning and Transparency”
- “Applying Ethical Models to Public Policy Decisions”
- “Performance Measurement: Aligning Processes and Procedures with Institutional Goals”
- “Utilizing Process Re-engineering for Productivity Improvement”
- “Advanced Communication and Public Relations in Public Environments and Honoring the Community’s Voice”
- “Business Etiquette and Interpersonal Savvy”
- “Tips on Managing Your Career in the Public Sector”
- “Practices in Talent Management”
- “Building Budgets and Using Financial Information to Make Strategic Decisions in the Public Arena”
- “Employing Effective Negotiation Strategies in a Public Employee Organization”
- “Extraordinary Leadership”

This program qualifies for 10 Continuing Education Units (CEUs) through our alliance with UC San Diego. A critical component of this program is the requirement for participants to complete a major work-related project under the guidance of a sponsor from their home organization. Several CPM graduate projects have offset the cost of the program through these projects.

### **Supervisors Academy**

The Supervisors Academy is designed for first and second line supervisors and those who lead front-line employees. This program can vary in length from 5-8 days depending on variation in the content and activities. The typical curriculum modules include:

- “The Changing Role of Supervisors”
- “Best Practices of Leadership”
- “Facilitation Skills and Meeting Effectiveness”

- “Communication and Myers Briggs Type Indicator”
- “Components of High Performance Teams”
- “Advanced Coaching and Influencing Others”
- “Managing Change”
- “Communication and Conflict Resolution”
- “Decision-making and Accountability”
- “Goal Setting with Staff”
- “Cultural Awareness: Generational Issues and Gender Communication”

**Supervisors Transition and Readiness Training (START)**

This two-day program is comprised of four modules to help new supervisors to hit the ground running in their new roles and avoid the pitfalls that many new supervisors fall into in the first few months on the job. Over the two days, the participants address:

- What does it mean to be a supervisor?
- How can you make a successful transition from individual contributor to being in charge of a unit, team, or even department?
- How should you deal with the most common practical issues new supervisors often face?
- Participants also create a Transition Action Plan which contains two elements:
  - specific actions the participant will take to ensure their transition is successful, and
  - an outline of long-range skill development options that should be researched and undertaken.

b. Description of the organization and staffing to be used for the project.

The project team consists of The Centre Executive Director, the Program Facilitator, the Training Coordinator, Business Manager, and the instructors for each of the program sessions.



- The Executive Director provides general oversight and is the signing authority for The Centre.
- The Supervisors Academy, Management Academy and Executive Academy Facilitators will be present at each of the sessions within the Academy as well as manage the majority of participant communications and coordination of the instructors/guest speakers.
- The Training Coordinator will arrange all materials, binders, and assessments as well as facilitate execution of the Competency Instrument.
- The Business Manager manages all of the financial details of the program, including invoicing and accounts payable.
- The consultants, instructors, guest speakers will provide day-of services as appropriate. Instructors are selected based on their experience in the public sector, their educational background, and their expertise to deliver the specific content of the module.

Most of our consulting staff is Ph.D. trained or Masters-degree trained. The only exceptions are consultants with decades of hands on leadership experience within the public sector (i.e. retired City Manager, Chief Administration Officer, etc.) or those with specific subject matter expertise necessary for a particular topic. Consultant backgrounds range from industrial/organizational psychology, clinical psychology, sociology, marriage and family counseling, and clinical social work.

Consultants on this project include, but are not limited to:

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- Keren Stashower, M.S.W., BCC
- Gary Winters
- Joyce Pardieu, Ph.D.
- Judy Kaplan Baron, Ph.D.

We have long-standing successful working relationships with each of the consultants selected for this program.

c. Indication of information and participation the proposer will require from County staff.

The Centre develops a close relationship with internal stakeholders to ensure the quality of the programs and bridge communications between program participants and our program staff. We will work regularly with key county staff to schedule sessions, transfer program materials, and develop program components in a way that meets the organization's goals. We are conscious of the time we require of internal staff and we work together to set meeting agendas, focus efforts, streamline processes, and work efficiently.

**Initial and Ongoing Planning Meetings with Internal OD Partner(s)**

The initial planning meeting produces a work plan and common expectations for timelines, deliverables, partnership roles, etc. The Centre has a high bar for the design of effective development programs and ongoing planning and partnership meetings are instrumental in keeping the consultants and the County's internal team informed and knowledgeable about the County's preferences, culture and big picture issues.

d. Indication of time frame necessary to complete the plan review once a Notice to Proceed is issued.

Upon the Notice to Proceed, The Centre will make key staff available as soon as possible to meet to review the plan and make any revisions necessary. We would expect this process to take 2-6 weeks, depending on the revisions and customization required.

5. Fees and Insurance

a. Propose total fixed fees to complete project as described under Project Scope.

<b>Supervisors Academy</b>			
<b>Description</b>	<b>Notes</b>	<b>Rate</b>	<b>Total</b>
Project Management/Planning and Evaluation			\$7,520
Supervisors Academy Up to 8-Day Supervisors Academy (including 2 days of START program) for a guaranteed minimum attendance of 20 participants and a maximum of 40 participants. County of San Luis Obispo will pay the guaranteed minimum even if fewer than 20 participants attend.  Cost includes all assessment instruments, materials, travel, administrative logistical support and 1 facilitator and content experts/presenters for up to an 8-day academy to be held at an on- site location. To keep travel costs low, sessions should occur 2 days in a row. County of San Luis Obispo to supply training space and audio-visual equipment.  Note: The details of the content of this program will be determined in the planning phase of the project.	One 8-day Supervisors Academy for 20 participants guaranteed and 40 participants maximum  Or 2-day START program + 6-day Supervisors Academy	\$2,500 per participant for guaranteed minimum of 20 per cohort  Per participant charge for participants 21-40 is \$1,200 each within each cohort once minimum is met	\$50,000
Contingency (additional speakers, materials, etc.)		TBD	\$8,000
General Liability Insurance		\$1,000,000 General Liability Insurance	Included
<b>Total</b>			<b>\$65,520</b>

## Management Academy

Description	Rate	Total
Project Management/Planning and Evaluation/Competency Validation		\$17,000
<p>Leadership Academy                      8-Day Management Academy for a guaranteed minimum attendance of 20 participants and a maximum of 40 participants. County of San Luis Obispo will pay the guaranteed minimum even if fewer than 20 participants attend. Cost includes all assessment instruments, materials, travel, administrative logistical support and 1 facilitator and content experts/presenters for a 6-day academy to be held at an on-site location. County of San Luis Obispo to supply training space and audio-visual equipment.                      Note: The details of the content of this program will be determined in the planning phase of the project.</p>	<p>\$4,600 per participant for guaranteed minimum of 20</p> <p>Per participant charge for participants 21-40 is \$2,000 each within each cohort once minimum is met</p>	\$70,000
Contingency for Additional Trainers/Speakers for Leadership Academy	\$8,000	\$8,000
<b>Total</b>		<b>\$100,000</b>
<b>General Liability Insurance</b>	\$1,000,000 General Liability Insurance	Included

<b>Executive Academy</b>		
<b>Description</b>	<b>Rate</b>	<b>Total</b>
Project Management/Planning and Evaluation/Competency Validation		\$15,000
Executive Academy Includes facilitation of 5 sessions with guest speakers, preparation and design time for facilitator and speakers, materials, two coaching sessions per participant, multi-rater assessment, and travel expenses for program. Note: The Executive Academy will be completely customized to meet the needs of San Luis Obispo. The details of the content of this program will be determined in the planning phase of the project.	This is a fixed fee cost based on a maximum of 20 participants at \$3,500 per person.	\$70,000
Contingency for Additional Trainers/Speakers for Executive Academy	\$8,000	\$8,000
<b>Total</b>		<b>\$93,000</b>
<b>General Liability Insurance</b>	\$1,000,000 General Liability Insurance	Included

- b. The selected Consultant will be required to provide insurance coverage in the amount of \$ 1,000,000 General Liability Insurance. This amount of insurance coverage shall be reflected in your estimated professional fee.

The Centre for Organization Effectiveness agrees to and complies with all insurance Requirements stated within the RFP.

- c. The Consultant shall provide within five (5) days after the Notice of Award is issued a certificate of liability insurance naming the County of San Luis Obispo and its employees and officers as additionally named insured. This shall be maintained in full force and effect for the duration of the contract and must be in an amount and format satisfactory to the County.

The Centre for Organization Effectiveness agrees to provide a certificate of liability insurance naming the County of San Luis Obispo and its employees and officers as additionally named insured within five (5) days after the Notice of Award is issued.

d. **INSURANCE REQUIREMENTS**

Contractor shall procure and maintain for the duration of the contract insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder by the Contractor, its agents, representatives, or employees.

The Centre for Organization Effectiveness agrees to and complies with all Insurance Requirements stated within the RFP.

**EMPLOYEE UNIVERSITY TRAINING AND DEVELOPMENT CONSULTANT**

**LOCAL VENDOR PREFERENCE**

The County has established a local vendor preference. When quality, service, and other relevant factors are equal, responses to Requests for Proposals will be evaluated with a preference for local vendors. Note the following exceptions:

1. Those contracts which State Law or, other law or regulation precludes this local preference.
2. Public works construction projects.

A "local" vendor preference will be approved as such when, 1) The vendor conducts business in a fully staffed office with a physical address within the County of San Luis Obispo; 2) The vendor holds a valid business license issued by the County or a city within the County; and 3) The vendor has conducted business at the local address for not less than six (6) months prior to the due date of this Request for Proposal..

Proposals received in response to this Request for Proposal will be evaluated by the Selection Committee considering the local vendor preference described above when quality, service and other relevant factors are equal. The burden of proof will lie with proposers relative to verification of "local" vendor preference. Should any questions arise, please contact a buyer at (805) 781-5200.

	YES	NO
Do you claim local vendor preference?		x
Do you conduct business in an office with a physical location within the County of San Luis Obispo?		x
Business Address: <u>8950 Villa La Jolla Drive, Suite A204</u> _____ <u>La Jolla, CA 92037</u>		
Years at this Address: <u>4</u> _____		
Does your business hold a valid business license issued by the County or a City within the County?		X
Name of Local Agency which issued license: _____		

Business Name: The Centre for Organization Effectiveness \_\_\_\_\_

Authorized Individual: \_\_\_\_\_ Title: Executive Director \_\_\_\_\_

Signature:  \_\_\_\_\_ Dated: 10/24/13 \_\_\_\_\_