



Amendment No. 2
to
Contract No. NA200000025
for
Citywide Training for Implicit Bias
Between
International Training Consortium, Inc. ("Contractor")
and the
City of Austin, Texas ("City")

- 1.0 The City hereby extends the subject contract for the period of February 21, 2022 through February 20, 2023.
- 2.0 The total contract authorization is recapped below:

Action	Action Amount	Total Contract Amount
Basic Term: 02/21/2020-02/20/2021	\$400,562.76	\$400,562.76
Amendment No. 1: Option 1-Extension 02/21/2021 – 02/20/2022	\$400,562.76	\$636,300.00
Amendment No. 2: Time only extension 02/21/2022 – 02/20/2023	\$0.00	\$636,300.00

- 3.0 MBE/WBE goals do not apply to this contract.
- 4.0 By signing this Amendment, the Contractor certifies that the vendor and its principals are not currently suspended or debarred from doing business with the Federal Government, as indicated by the GSA List of Parties Excluded from Federal Procurement and Non-Procurement Programs, the State of Texas, or the City of Austin.
- 5.0 All other terms and conditions remain the same.

BY THE SIGNATURES affixed below, this amendment is hereby incorporated into and made a part of the above-referenced contract.

Sign/Date:

Charles Pettit
28 SEP 2021

Brenita Y.

Wilkison

Digitally signed by
Brenita Y. Wilkison
Date: 2021.09.29
07:02:10 -05'00'

Printed Name:

CHARLES PETTIT

Authorized Representative

Brenita Wilkison
Procurement Specialist III

International Training Consortium, Inc
23749 Rolling Fork Way
Gaithersburg, MD 20882
skip@international-training.com

City of Austin
Purchasing Office
124 W. 8th Street, Ste. 310
Austin, Texas 78701



Amendment No.1
Contract No. MA 5800 NA200000025
for
Citywide Training for Implicit Bias
Between
International Training Consortium, Inc. ("Contractor")
and the
City of Austin, Texas ("City")

- 1.0 The City hereby exercises the first extension option for the above-referenced contract. Effective February 21, 2021 to February 20, 2022. No options remain.
- 2.0 The total contract amount is increased by \$400,562.76 for the extension period. The total Contract amount is recapped below:

Term	Contract Amount for the Item	Total Contract Amount
Basic Term: 02/21/2020-02/20/2021	\$400,562.76	\$400,562.76
Amendment No. 1: Option 1 Extension 02/21/2021-02/20/2022	\$400,562.76	\$801,125.52

- 3.0 MBE/WBE goals were not established for this contract.
- 4.0 By signing this Amendment the Contractor certifies that the Contractor and its principals are not currently suspended or debarred from doing business with the Federal Government, as indicated by the General Services Administration (GSA) List of Parties Excluded from Federal Procurement and Non-Procurement Programs, the State of Texas, or the City of Austin.
- 5.0 ALL OTHER TERMS AND CONDITIONS REMAIN THE SAME.

BY THE SIGNATURE(S) affixed below, this Amendment is hereby incorporated and made a part of the above referenced contract.

BY THE SIGNATURE(S) affixed below, this Amendment is hereby incorporated and made a part of the above referenced contract.

INTERNATIONAL TRAINING CONSORTIUM, INC.

Charles Pettit 28 JAN 2021
Signature & Date

Printed Name: CHARLES PETTIT
Authorized Representative

skip@international-training.com

1- 301-928-5103

James T
Howard

Digitally signed by
James T Howard
Date: 2021.01.29
08:08:19 -06'00'
Signature & Date
James T. Howard, Procurement Specialist IV
City of Austin Purchasing Office



**ADDENDUM
PURCHASING OFFICE
CITY OF AUSTIN, TEXAS**

Solicitation: RFP 5800 RJZ3005

Addendum No: 4

Date of Addendum: 11/7/19

This addendum is to incorporate the following changes to the above referenced solicitation:

- I. **Add Contact:** The Authorized Contact for contractual and technical issues has been changed as follows:

Authorized Contact: Primary
Cyrenthia Ellis
Procurement Manager
512-974-1709
Cyrenthia.ellis@austintexas.gov

Secondary
Lynnette Hicks
Procurement Specialist IV
512-974-3349
Lynnette.hicks@austintexas.gov

- II. ALL OTHER TERMS AND CONDITIONS REMAIN THE SAME.

ACKNOWLEDGED BY:

CHARLES "Skip" Pettit Charles "Skip" Pettit
Name Authorized Signature

11/14/2019
Date



**ADDENDUM
PURCHASING OFFICE
CITY OF AUSTIN, TEXAS**

Solicitation: RFP 5800 RJZ3005

Addendum No: 3

Date of Addendum: 6/4/19

This addendum is to incorporate the following changes to the above referenced solicitation:

- I. **Extension:** The proposal due date is hereby extended until Tuesday, June 11th at 2:00 pm CT.
- II. ALL OTHER TERMS AND CONDITIONS REMAIN THE SAME.

ACKNOWLEDGED BY:

Name

Authorized Signature

Date

RETURN ONE COPY OF THIS ADDENDUM TO THE PURCHASING OFFICE, CITY OF AUSTIN, WITH YOUR RESPONSE OR PRIOR TO THE SOLICITATION CLOSING DATE. FAILURE TO DO SO MAY CONSTITUTE GROUNDS FOR REJECTION.



**ADDENDUM
PURCHASING OFFICE
CITY OF AUSTIN, TEXAS**

Solicitation: RFP 5800 RJZ3005

Addendum No: 2

Date of Addendum: 5/31/19

This addendum is to incorporate the following changes to the above referenced solicitation:

I. Questions:

Q1: Does every facilitator/coach need to be a registered vendor for the city or just the primary entity? (For example, Diane and I collaborate, but she is registered and I am still getting my information together for city, state vendor and HUB.)

A1: If you are awarded the contract, the Prime and all their subcontractors will need to register as a vendor with the City. This is not required for a prime and their subcontractors to submit a proposal for consideration before the due date.

Q2: Does every facilitator/coach need to be an Austin based business? (Example: One potential subcontractor is out of state.)

A2: None of the personnel for the prime or the subs are required to be an Austin based business for consideration. There is a local preference given to those vendors and their subcontractors who are local. Please refer to form 0605 to review the local preference and 0600 to see how this is weighted in the evaluation factors.

Q3: Will the funds to be already secured, or will it be funded in an upcoming budget or grant process? What is the estimated budget for this project? (We want to be sure to avoid overbidding and are determining the hours required on each phase such that we can bid fairly and be able to do the work within that budget while customizing for the city as much as possible, and creating tools that have the greatest value in the long-term.)

A3: Please refer to addendum 1 A33 for the City response issued on 5/21/19.

II. ALL OTHER TERMS AND CONDITIONS REMAIN THE SAME.

ACKNOWLEDGED BY:

Name

Authorized Signature

Date

RETURN ONE COPY OF THIS ADDENDUM TO THE PURCHASING OFFICE, CITY OF AUSTIN, WITH YOUR RESPONSE OR PRIOR TO THE SOLICIATION CLOSING DATE. FAILURE TO DO SO MAY CONSTITUTE GROUNDS FOR REJECTION.

**CONTRACT BETWEEN THE CITY OF AUSTIN (“City”)
AND
International Training Consortium, Inc. (“Contractor”)
for
Citywide Training For Implicit Bias
MA 5800 NA200000025**

The City accepts the Contractor’s Offer (as referenced in Section 1.1.3 below) for the above requirement and enters into the following Contract.

This Contract is between International Training Consortium, Inc. having offices at 23749 Rolling Fork Way, Gaithersburg, MD 20882 and the City, a home-rule municipality incorporated by the State of Texas, and is effective as of the date executed by the City (“Effective Date”).

Capitalized terms used but not defined herein have the meanings given them in Solicitation Number RFP 5800 RJZ3005.

1.1 This Contract is composed of the following documents:

- 1.1.1 This Contract
- 1.1.2 The City’s Solicitation, RFP, 5800 RJZ3005 including all documents incorporated by reference
- 1.1.3 Exhibit 1 - The Contractor’s Revised Best and Final
- 1.1.4 International Training Consortium, Inc. Offer, dated June 11, 2019, including subsequent clarifications

1.2 Order of Precedence. Any inconsistency or conflict in the Contract documents shall be resolved by giving precedence in the following order:

- 1.2.1 This Contract
- 1.2.2 The City’s Solicitation as referenced in Section 1.1.2, including all documents incorporated by reference
- 1.2.3 Exhibit 1 - The Contractor’s Revised Best and Final by reference in 1.1.3
- 1.2.4 The Contractor’s Offer as referenced in Section 1.1.4, including subsequent clarifications.

1.3 Compensation. The Contractor shall be paid a total Not-to-Exceed amount of \$400,564.00 for the initial Contract term and 400,562.76 for each extension option for a total Not-to-Exceed Amount of \$801,126.76 Payment shall be made upon successful completion of services or delivery of goods as outlined in each individual Delivery Order.

1.4 Clarifications and Additional Agreements. The following are incorporated into the Contract.

- 1.4.1 Exhibit 1 - Revised Best and Final by reference in 1.1.3

This Contract (including any Exhibits) constitutes the entire agreement of the parties regarding the subject matter of this Contract and supersedes all prior and contemporaneous agreements and understandings, whether written or oral, relating to such subject matter. This Contract may be altered, amended, or modified only by a written instrument signed by the duly authorized representatives of both parties.

In witness whereof, the parties have caused a duly authorized representative to execute this Contract on the date set forth below.

INTERNATIONAL
CONSORTIUM, INC.

TRAINING

CITY OF AUSTIN

CHARLES P. PETTIT

Printed Name of Authorized Person

Charles P. Pettit

Signature

President / CEO

Title:

21 FEB 2020

Date:

Cyrenthia Ellis

Printed Name of Authorized Person

Cyrenthia Ellis

Signature

Procurement Manager

Title:

2/21/2020

Date:

List of Exhibits:

Exhibit 1 - The Contractor's Revised Best and Final

Exhibit 2 - Section 0800, Signed Non Discrimination Affidavit

Exhibit 3 - Non-Suspension or Debarment Certification, Section 805

EXHIBIT 1

RFP# 5800 RJZ3005

IMPLICIT BIAS AND CULTURAL COMPETENCY TRAINING AND DEVELOPMENT REVISED BEST AND FINAL

City of Austin
Purchasing Office
P.O. Box 1088
Austin, 78767-8845

October 28, 2019

International Training Consortium, Inc.

23749 Rolling Fork Way

Gaithersburg, MD 20882

Phone: 301-428-0670/Cell: 301-928-5103

FAX: 301-972-3906

Email: skip@international-training.com

SDVOSB VA-Verified VCE/VETS

DUNS: 88-4653403/CAGE Code: 080Q0

INTERNATIONAL TRAINING CONSORTIUM, INC.

October 28, 2019

Ricardo Zavala, CTCM, MPA
Procurement Specialist III
City of Austin Purchasing Office

RE: Implicit Bias and Cultural Competency Training and Development Request for Proposal #5800 RJZ3005 – Revised Best and Final Offer (BAFO)

Dear Mr. Zavala:

International Training Consortium, Incorporated, (ITCI) is pleased to submit our Revised Best and Final Offers (BAFO) to the Implicit Bias and Cultural Competency Training and Development (Implicit Bias) Request for Proposal #5800 RJZ3005.

If you require any further clarification as you continue your evaluation process, please do not hesitate to contact us. We look forward to working with the City of Austin.

Thank you,

A handwritten signature in black ink, reading "Charles Pettit". The signature is written in a cursive, flowing style.

Charles "Skip" Pettit
President, ITC, Inc.
SDVOSB

Financial Proposal ITC -City of Austin Citywide Implicit Bias Training							
Financial Proposal ITC -City of Austin Citywide Implicit Bias Training 2nd BAFO Request	Number of Hours	Rate		Cost	Cost/Overhead/Profit	BAFO Discount 3.75%	2nd BAFO Pricing
Initial Assessment / Including Overview Assessment of development materials	250	\$ 296.88	=	\$74,220.00	\$96,486.00	3.75%	\$92,867.78
Design Training to Executive and Manager Populations	360	\$125.00	=	\$45,000.00	\$58,500.00	3.75%	\$56,306.25
Deliver Training Executive and Manager Populations 36 classes Max 25 per class and 2 Facilitators	864	\$255.00	=	\$220,320.00	\$286,416.00	3.75%	\$275,675.40
Post Training Assessments of both trial and regular training	60	\$260.83	=	\$15,649.80	\$20,344.74	3.75%	\$19,581.81
Design Individual Contributor and Train the Trainer courses	175	\$125.00	=	\$21,875.00	\$28,437.50	3.75%	\$27,371.09
Deliver Training for Train the Trainer 8 Classes 15 per Class 2 Facilitators	384	\$225.00	=	\$86,400.00	\$112,320.00	3.75%	\$108,108.00
Post Training Assessment of Train-the-Trainer classes with HR	80	\$229.00	=	\$18,320.00	\$23,816.00	3.75%	\$22,922.90
Update design for supervisors and individual contributors	50	\$125.00	=	\$6,250.00	\$8,125.00	3.75%	\$7,820.31
Review and updated design of supervisors and individual contributors course assess with HR	16	\$246.88	=	\$3,950.08	\$5,135.10	3.75%	\$4,942.54
Plan rollout of the material/training for CLPs to present to City employees with HR	40	\$260.83	=	\$10,433.20	\$13,563.16	3.75%	\$13,054.54
Monitor Each CLP a minimum of 10% of presentations (40 participants per class with 2 CLP Instructors)	156	\$150.00	=	\$23,400.00	\$30,420.00	3.75%	\$29,279.25
Design 1-hour facilitated conversation tool for supervisors	30	\$125.00	=	\$3,750.00	\$4,875.00	3.75%	\$4,692.19
Design Continual Assessment Tool	40	\$229.00	=	\$9,160.00	\$11,908.00	3.75%	\$11,461.45
Glossary of Terms	8	\$125.00	=	\$1,000.00	\$1,300.00	3.75%	\$1,251.25
Available for curriculum adjustments during initial rollout up to 15 months after launch/8 hours per month	120	\$150.00	=	\$18,000.00	\$23,400.00	3.75%	\$22,522.50
Closeout of contract to include final reports/ Including Final Presentation	60	\$256.67	=	\$15,400.20	\$20,020.26	3.75%	\$19,269.50
			=	\$0.00	\$0.00	3.75%	
			=	\$0.00	\$0.00	3.75%	
			=	\$0.00	\$0.00	3.75%	
			=	\$0.00	\$0.00	3.75%	
			=	\$0.00	\$0.00	3.75%	
	2,693		=	\$0.00	\$0.00	3.75%	
Total Bidder Cost/ total Cost plus Cost/Overhead/Profit				\$573,128.28	\$745,066.76		\$717,126.76
Materials/Workbooks, Travel and Misc. 2nd BAFO Plus 5 additional sets of Materials per Class. 5 additional Students X 36 Classes @ \$50 each = \$9000					\$75,000.00		\$84,000.00
				Total Price	\$820,066.76	2nd BAFO Total Price	\$801,126.76

NOTE: Hourly costs for ITCI Team Members are based on the maximum rate that MAY be applied to work performed and may not represent actual rate per assignment. Pricing for each task is based on a blended rate.

EXHIBIT 2
City of Austin, Texas
NON-DISCRIMINATION AND NON-RETALIATION CERTIFICATION

City of Austin, Texas
Equal Employment/Fair Housing Office

To: City of Austin, Texas,

I hereby certify that our firm complies with the Code of the City of Austin, Section 5-4-2 as reiterated below, and agrees:

- (1) Not to engage in any discriminatory employment practice defined in this chapter.
- (2) To take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without discrimination being practiced against them as defined in this chapter, including affirmative action relative to employment, promotion, demotion or transfer, recruitment or recruitment advertising, layoff or termination, rate of pay or other forms of compensation, and selection for training or any other terms, conditions or privileges of employment.
- (3) To post in conspicuous places, available to employees and applicants for employment, notices to be provided by the Equal Employment/Fair Housing Office setting forth the provisions of this chapter.
- (4) To state in all solicitations or advertisements for employees placed by or on behalf of the Contractor, that all qualified applicants will receive consideration for employment without regard to race, creed, color, religion, national origin, sexual orientation, gender identity, disability, sex or age.
- (5) To obtain a written statement from any labor union or labor organization furnishing labor or service to Contractors in which said union or organization has agreed not to engage in any discriminatory employment practices as defined in this chapter and to take affirmative action to implement policies and provisions of this chapter.
- (6) To cooperate fully with City and the Equal Employment/Fair Housing Office in connection with any investigation or conciliation effort of the Equal Employment/Fair Housing Office to ensure that the purpose of the provisions against discriminatory employment practices are being carried out.
- (7) To require of all subcontractors having 15 or more employees who hold any subcontract providing for the expenditure of \$2,000 or more in connection with any contract with the City subject to the terms of this chapter that they do not engage in any discriminatory employment practice as defined in this chapter

For the purposes of this Offer and any resulting Contract, Contractor adopts the provisions of the City's Minimum Standard Non-Discrimination and Non-Retaliation Policy set forth below.

City of Austin
Minimum Standard Non-Discrimination and Non-Retaliation in Employment Policy

As an Equal Employment Opportunity (EEO) employer, the Contractor will conduct its personnel activities in accordance with established federal, state and local EEO laws and regulations.

The Contractor will not discriminate against any applicant or employee based on race, creed, color, national origin, sex, age, religion, veteran status, gender identity, disability, or sexual orientation. This policy covers all aspects of employment, including hiring, placement, upgrading, transfer, demotion, recruitment,

recruitment advertising, selection for training and apprenticeship, rates of pay or other forms of compensation, and layoff or termination.

The Contractor agrees to prohibit retaliation, discharge or otherwise discrimination against any employee or applicant for employment who has inquired about, discussed or disclosed their compensation.

Further, employees who experience discrimination, sexual harassment, or another form of harassment should immediately report it to their supervisor. If this is not a suitable avenue for addressing their complaint, employees are advised to contact another member of management or their human resources representative. No employee shall be discriminated against, harassed, intimidated, nor suffer any reprisal as a result of reporting a violation of this policy. Furthermore, any employee, supervisor, or manager who becomes aware of any such discrimination or harassment should immediately report it to executive management or the human resources office to ensure that such conduct does not continue.

Contractor agrees that to the extent of any inconsistency, omission, or conflict with its current non-discrimination and non-retaliation employment policy, the Contractor has expressly adopted the provisions of the City's Minimum Non-Discrimination Policy contained in Section 5-4-2 of the City Code and set forth above, as the Contractor's Non-Discrimination Policy or as an amendment to such Policy and such provisions are intended to not only supplement the Contractor's policy, but will also supersede the Contractor's policy to the extent of any conflict.

UPON CONTRACT AWARD, THE CONTRACTOR SHALL PROVIDE THE CITY A COPY OF THE CONTRACTOR'S NON-DISCRIMINATION AND NON-RETALIATION POLICIES ON COMPANY LETTERHEAD, WHICH CONFORMS IN FORM, SCOPE, AND CONTENT TO THE CITY'S MINIMUM NON-DISCRIMINATION AND NON-RETALIATION POLICIES, AS SET FORTH HEREIN, OR THIS NON-DISCRIMINATION AND NON-RETALIATION POLICY, WHICH HAS BEEN ADOPTED BY THE CONTRACTOR FOR ALL PURPOSES WILL BE CONSIDERED THE CONTRACTOR'S NON-DISCRIMINATION AND NON-RETALIATION POLICY WITHOUT THE REQUIREMENT OF A SEPARATE SUBMITTAL.

Sanctions:

Our firm understands that non-compliance with Chapter 5-4 and the City's Non-Retaliation Policy may result in sanctions, including termination of the contract and suspension or debarment from participation in future City contracts until deemed compliant with the requirements of Chapter 5-4 and the Non-Retaliation Policy.

Term:

The Contractor agrees that this Section 0800 Non-Discrimination and Non-Retaliation Certificate of the Contractor's separate conforming policy, which the Contractor has executed and filed with the City, will remain in force and effect for one year from the date of filing. The Contractor further agrees that, in consideration of the receipt of continued Contract payment, the Contractor's Non-Discrimination and Non-Retaliation Policy will automatically renew from year-to-year for the term of the underlying Contract.

Dated this 21 FEB day of FEBRUARY, 2020

CONTRACTOR
Authorized
Signature

Title

INT'L TRAINING CONSORTIUM
Charles P. Pottet
PRESIDENT/CEO

EXHIBIT 3

**City of Austin, Texas
Section 0805**

NON-SUSPENSION OR DEBARMENT CERTIFICATION

The City of Austin is prohibited from contracting with or making prime or sub-awards to parties that are suspended or debarred or whose principals are suspended or debarred from Federal, State, or City of Austin Contracts. Covered transactions include procurement contracts for goods or services equal to or in excess of \$25,000.00 and all non-procurement transactions. This certification is required for all Vendors on all City of Austin Contracts to be awarded and all contract extensions with values equal to or in excess of \$25,000.00 or more and all non-procurement transactions.

The Offeror hereby certifies that its firm and its principals are not currently suspended or debarred from bidding on any Federal, State, or City of Austin Contracts.

Contractor's Name:

INTERNATIONAL TRAINING CONSORTIUM, INC.

Signature of Officer or
Authorized
Representative:

Charles P. Pettit

Date:

21 FEB 2020

Printed Name:

CHARLES P. PETTIT

Title

PRESIDENT / CEO

INTERNATIONAL TRAINING CONSORTIUM, INC.

October 28, 2019

Ricardo Zavala, CTCM, MPA
Procurement Specialist III
City of Austin Purchasing Office

RE: Implicit Bias and Cultural Competency Training and Development Request for Proposal #5800 RJZ3005 – Revised Best and Final Offer (BAFO)

Dear Mr. Zavala:

International Training Consortium, Incorporated, (ITCI) is pleased to submit our Revised Best and Final Offers (BAFO) to the Implicit Bias and Cultural Competency Training and Development (Implicit Bias) Request for Proposal #5800 RJZ3005.

If you require any further clarification as you continue your evaluation process, please do not hesitate to contact us. We look forward to working with the City of Austin.

Thank you,

A handwritten signature in black ink, appearing to read "Charles Pettit". The signature is fluid and cursive, with a large initial "C" and a stylized "P".

Charles "Skip" Pettit
President, ITC, Inc.
SDVOSB



RFP# 5800 RJZ3005

**IMPLICIT BIAS AND
CULTURAL COMPETENCY
TRAINING AND
DEVELOPMENT**

**City of Austin
Purchasing Office
P.O. Box 1088
Austin, 78767-8845**

June 11, 2019

International Training Consortium, Inc.

**23749 Rolling Fork Way
Gaithersburg, MD 20882
Phone: 301-428-0670/Cell: 301-928-5103
FAX: 301-972-3906
Email: skip@international-training.com
SDVOSB VA-Verified VCE/VETS
DUNS: 88-4653403/CAGE Code: 080Q0**

INTERNATIONAL TRAINING CONSORTIUM, INC.

TO: City of Austin Purchasing Office

International Training Consortium, Incorporated, (ITCI) is pleased to submit its response to the *Implicit Bias and Cultural Competency Training and Development (Implicit Bias)* Request for Proposal #5800 RJZ3005.

ITCI has demonstrated expertise in designing and delivering Implicit Bias and Cultural Competency consulting and training to every level of large and small organizations and governmental entities.

As a certified service disabled, veteran-owned small business (SDVOSB) with a strong history of providing similar services to local, state, federal, and commercial clients, the ITCI Team is an ideal partner to assist the City of Austin and its employees with creating and delivering an implicit bias and cultural competency program with long-lasting impact.

Our core Team consists of Austin-based attorney Mindy Gulati, President of Fundamental Advisory, a consulting firm focused on advising businesses and law firms on issues related to Diversity, Equity, and Inclusion; San Antonio-based & active Austin-registered WOSB Patty Porter; Austin-based professional development & executive coach Eric Collier; tri-lingual (English/Spanish/Sign-Language) Bias & Inclusion change management expert Teresita Saff; Bias & Organizational Assessment expert LaPonda Fitchpatrick; Bias & Inclusive language expert Dr. Lester Hoffman; OD consultants and trainers Dr. Marc & Dr. Joan De Simone; Bernard Fitchpatrick, Trainer; Dr. Stephany Powell OD SME; Paula Spears HR SME; Administrative SME Becca Sears; & Charles "Skip" Pettit, Bias trainer & program evaluation SME.

This robust mix of talent offers the City of Austin a diverse team with diverse skills. Together we bring a wealth of knowledge, expertise, and HUNDREDS of years of successful Change Management and training and consulting experience with cities like Los Angeles, CA and Baltimore, MD and Washington, DC., and government agencies, universities and city services such as Police, Fire, EMS, Health & Social Services, Courts, and myriad other State, City & Municipality services.

The ITCI Team is available to begin immediately upon award to work with the Mayor's Office, the City, and select others to design and deliver dynamic and robust training, consulting, and evaluation programs for City employees at ALL levels.

Thank you,



Charles "Skip" Pettit
President, ITC, Inc.
SDVOSB

EXECUTIVE SUMMARY

International Training Consortium, Incorporated

International Training Consortium, Incorporated, (ITCI) is pleased to submit our response to the Implicit Bias and Cultural Competency Training and Development (Implicit Bias) Request for Proposal #5800 RJZ3005. ITCI has demonstrated expertise in designing and delivering Implicit Bias and Cultural Competency consulting and training to every level of large and small organizations and governmental entities. As a certified service disabled, veteran-owned small business (SDVOSB) with a strong history of providing similar services to local, state, federal, and commercial clients, ITCI is an ideal partner to assist the City of Austin and its employees with creating an implicit bias and cultural competency program that will have a lasting impact.

Who We Are

For more than 25 years, ITCI, led by Charles “Skip” Pettit, Chief Learning Officer/Director of Training, has built a solid team of 100+ top-tier trainers and consultants from the US and international communities. ITCI’s experience in the field of Implicit Bias research and training is well-documented. Skip is co-author of the book, *“Moving Beyond Bias,”* the first book published on implicit bias in the workplace which remains one of the most extensive studies of bias-free communication. He has also created a whitepaper, *Anti-Bias Strategies for Leaders* for the Federal EEO Council and has facilitated dozens of implicit bias and related training programs. In the US military, he facilitated culture change groups at Defense Equal Opportunity Management Institute (DEOMI), formerly known as the Defense Race Relations Institute (DRRI).

When analyzing whether we are the right strategic partners for the City, and whether this is where we should focus our efforts as a part of your team, we spent considerable time understanding the impact we might have on the city of Austin through our dedicated work. Our team is first and foremost committed to impact; without the ability to create a lasting effect on organizations we work with, we do not seek engagements. In Austin, what we discovered is a city that has tremendous leaders who are not afraid to tackle the tough issues that exist in their city surrounding race, socioeconomic status, immigration status, religious affiliation, gender, and sexual orientation. With this in mind, we assembled a team that reflects the inclusion and equity that the City of Austin wants to see in itself. We walk the talk and are passionate about our work and will be an integral source of support for the City of Austin moving forward. And importantly, we are locally and directly invested in the City of Austin and will remain a part of the community long after this engagement is over through our local business presence partners Mindy Gulati, Eric Collier and others as identified in this response.

With a keen eye on managing costs, schedules, and performance, our vast knowledge and library of implicit bias and cultural competency research and training materials that can be customized for the City, ITCI can “hit the ground” quickly. We can create an extensive menu of practical, proven, and effective implicit bias and cultural competency learning strategies through our COTS Case Studies & Examples, Role Plays, DVDs, Self-assessments, and Small- and Large-Team activities. These will be made available and adapted for use by our team for the City and their train-the-trainer instructors.

Our Core Team

With considerable access to professional instructors, instructional systems developers, and knowledge in the area of implicit bias, cultural competency, and organizational change management, ITCI shall provide the City with expert on-site consultation & training for their employees. ITCI understands the importance of having a diverse team of SMEs to create the most comprehensive programs for our clients. In addition to Skip Pettit identified above, within these strategic partnerships, having local Austin talent as a part of the team cannot be understated. For this reason, a prominent member of our team is Mindy Gulati, JD, President of Fundamental Advisory. Fundamental Advisory is a consulting firm based in the City of Austin. Her firm is focused on advising businesses and law firms on issues related to diversity and inclusion (D&I), implicit bias, and building culture. Complimentary to Fundamental Advisory, Mindy is the founder of The Gulati Firm LLC, that specializes in workplace investigations and legal compliance issues. Mindy was also a member of the *Mayor’s Task Force on Institutional Racism and Inequities* that set the foundation for this engagement. Her insights are invaluable to this engagement and will allow our team to “hit the ground running.” Mindy is our Project Lead and the Austin contact.

Eric Collier is a Certified Neuro-Transformational Coach (CNTC) and the principal for his BottomLine Solutions, Inc. a Coaching and Consulting firm based in Austin, Texas. He is a prominent member of the Austin Chapter of 100 Black Men of America, serving as Treasurer. Eric has over 35 years' experience in coaching and developing managers and executives from his career at IBM and his coaching and consulting practice. He has coached top executives, middle managers as well as new managers and emerging leaders. Eric has also coached leadership teams to create synergy and alignment in support of mission, vision, values and goals. He currently coaches scientists, managers and executives in the public sector.

Teresita Saff is a seasoned trainer and presenter with design, development, delivery, and administrative experience. Teri has trained more than 100,000 government employees in customer service, leadership, diversity, influencing skills, cultural change management and negotiation. She is an expert at interpersonal communication, collaboration, and teamwork. Her expertise in employee engagement and workplace motivation is grounded in emotional intelligence and political savvy. Teresita is an expert at TKI, MBTI, and 360 Assessments. Additionally, she is multi-lingual, fluent in English and Spanish, both written and oral, and can develop, write, and deliver in both languages. She is also fluent in American Sign Language (ASL). She has successfully completed 2 culture change efforts.

Dr. Lester Hoffman, Harvard PhD, is a nationally known thought leader, workshop and training facilitator, and researcher in the field of Implicit Bias. Dr. Hoffman's 20+ years of Thought Leadership and experience in the field of Implicit Bias Training, Writing, and Research is well-documented. Dr. Hoffman's PhD is in Instructional Design. In the field of Unconscious Bias, Dr. Hoffman is the author of two books, *"Moving Beyond Bias: Bias-Free Communication Strategies for Today's Organization,"* *"Anti-Bias Strategies for Leaders,"* and is working on a forthcoming book *"The Power of Micro-Messages."* He is a nationally known workshop leader, keynote speaker, and consultant on workplace issues including Unconscious Bias, Gender Bias, Racial Bias, Diversity & Inclusion, Leadership, Retention, Bullying, and Civility & Professionalism.

Dr. Marc DeSimone, PhD, received his Doctor of Philosophy from the University of Maryland, College Park. He has 25+ years as a trainer, organization consultant and educator. He has been an Adjunct Professor at Johns Hopkins University and the University of Maryland for more than 20 years. Most recently, Dr. DeSimone was the Director of Safety Training for the City of Baltimore reporting directly to the Mayor. In this role he led the culture change, diversity and inclusion, and race relations initiatives and training for the police and fire departments. He is an author and recognized expert in leadership, culture change, organization development and race relations.

Rounding out our core team is Captain LaPonda J. Fitchpatrick (Ret.), SHRM-SCP, D&I. She is a senior consultant in human resources management, law enforcement, and organization development. She received her Diversity and Inclusion and Implicit Bias certification from Cornell University. She is an international trainer, avid researcher, performs in-depth organizational analysis and employee engagement surveys, and develops and instructs on diversity and inclusion, implicit bias, cultural competency and workplace violence among other Human Resources Management issues. LaPonda brings extensive knowledge of organizations that have a large union presence in that she had a unique role where she represented both management and labor (union presidents) in collective bargaining negotiations and was a member of the City of Los Angeles' Joint Labor-Management Committee making recommendations on citywide collective bargaining contracts, employee administrative policy and procedures, and associated employee benefits.

Understanding of Your Needs

In our increasingly diverse and interconnected work environments where employees are encouraged to bring their whole selves to work to increase innovation and creativity, and to serve a more diverse populace, employees must learn both the hard and soft skills necessary to actively contribute to a productive and successful workplace. Implicit (unconscious) bias and a lack of cultural competency can hamper these efforts. Implicit bias impacts everyone and everything we see and do. Implicit biases are social stereotypes about certain groups that individuals form outside their own conscious awareness and intention. These attitudes or stereotypes that develop early in life can strengthen over time, and affect our understanding, actions, and decisions in an unconscious manner. However, they are not created in isolation; they function within a defined culture. Hence, the need to address both implicit bias and cultural competency through this engagement.

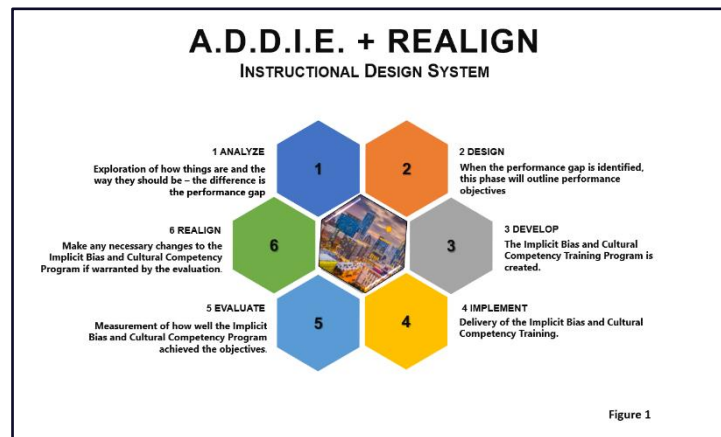
Everyone holds unconscious beliefs and biases about various social or identity groups. We derive these from the human tendency we all have to organize our social world by categorizing people and things. We are trying to make sense of the 11

million pieces of information per second our brain receives, when we are only able to cognitively process about 40 of those per second. Implicit bias is often incompatible with one's own conscious values - which is why people often deny they have specific implicit biases. Our implicit bias training provides a clear distinction between explicit and implicit bias where explicit bias, whether positive or negative, is a bias that the individual is aware of and chooses to consciously act upon.

Similarly, cultural competency is the ability to function effectively in the context of cultural differences. In your Austin Strategic Direction 2023 Report (2023), it notes that, “Nearly 1 in 3 homes speak languages other than English¹.” Implicit bias recognition and cultural competency are two critical skills every employee needs to possess, whether they are the janitor or the Mayor to serve a diverse constituency and maintain a livable City. “A Government That Works For All”² includes, “Increase[ing] the use of departmental equity assessments and cultural competency training to make better informed decisions that advance equity in our community.” Through the development of these skills by instilling a mindfulness that involves an increased awareness of emotions, thoughts, and surroundings, accompanied by a sense of acceptance and non-judgment of people that are perceived to be different, employees learn to be more thoughtful in their decision making and less discriminatory creating more positive outcomes and achieving a government that works for all.

The City of Austin leadership clearly understands the impact implicit bias and a lack of cultural competency can have on an organization that provides services to a diverse community. By creating the *Mayor’s Task Force on Institutional Racism and Inequities* that recognized “the need to dismantle systemic racism and inequities in the City,”³ the Mayor and Austin City Council are putting in motion through this RFP a clear direction and strategic focus on reducing implicit bias and increasing cultural competency, areas that were identified as requiring further training and understanding for City employees. City leadership is uniting city employees in their shared vision and strategic goals to be a more equitable city in support of their Mission and Vision statements, and their P.R.I.D.E. initiative, “Public Service & Engagement, Responsibility & Accountability, Innovation & Sustainability, Diversity & Inclusion, and Ethics and Integrity,” each of these requiring employees to treat each other and their constituents with excellent service regardless of their life’s standing.

Our Team has extensive knowledge and experience in analyzing government organizations to create the foundations for designing and delivering in-person, train-the-trainer, and virtual training programs that demonstrate best practices in implicit bias and cultural competency to “engage individuals in committing to lifelong training while learning to have courageous conversations about race and equity.”⁴ Working closely with City staff and utilizing our core SMEs with access to additional facilitators and instructors, ITCI will create a comprehensive program that is based on A.D.D.I.E, the industry standard instructional design system, plus any necessary realignment based on evaluation.



The ITCI Team looks forward to working with the City of Austin as a strategic partner based on the deliverables/milestones outlined in the RFP and our recommendations to accomplish this worthwhile project. We want to be your strategic partner in reaching your goals through 2023, “...with a new ‘operating system,’ or way that we work, that is more outcome oriented, adaptive, and responsive to community needs and opportunities.”⁵

Submitted by Charles “Skip” Pettit, Chief Learning Officer/Training Director, International Training Consortium, Inc.

¹ Austin Strategic Direction 2023. About Austin. Pg. 3

² Ibid. Pg. 29

³ City of Austin Implicit Bias Training RFP. Scope of Work – Implicit Bias. Pg. 1 of 7

⁴ ibid

⁵ City of Austin. *Austin Strategic Direction 2023*. Pg. 5



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Part I. Business Organization

PRIME for this project:



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Website: www.international-training.com

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For this engagement, ITCI will operate as a corporation and will enter into subcontractor agreements that include Austin-based and women-owned disadvantaged businesses.

PROJECT LEAD for this project:



Fundamental Advisory
106 E. Sixth Street, Suite 900
Austin, TX 78701
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Local Business Presence
Website: www.fundamentaladvisory.com

Contact: Mindy Gulati, JD
Email: mindy@fundamentaladvisory.com

For this engagement, Fundamental Advisory will operate as a subcontractor to ITCI.

Part II. System Concept and Solution

Our Philosophy

According to the American Psychological Association (APA), “Socioeconomic status can encompass quality of life attributes as well as the opportunities and privileges afforded to people within society. Minority racial groups are more likely to experience multidimensional poverty than their White counterparts.”⁶ Although socioeconomic issues can impact anyone in our society, they are particularly harmful to minority racial groups. We believe the best path to socio-economic equality is through the workplace. An inclusive, safe, and supportive workplace will result in employees who are happier, stay longer, and are more committed to the organization and the public they serve. This translates into a more effective workforce for employers and path towards economic stability, wealth generation, and a peaceful way of life for employees. performance assessment within organizations.

Businesses and organizations can be true leaders in the community by providing a workplace that is inclusive of all and educated on the ways to confront bias. To achieve this, organizations must first identify and diagnose bias to increase managers’ understanding of how it manifests in their own workplace and teams. Knowing that managers play a central role in how an organization functions because they make talent decisions, assignments and evaluations every day, their choices can directly impact how bias affects organizations. By engaging managers in the design and implementation of solutions that decrease bias, a foundation is set for them to continually define and educate their employees on what bias-free behavior looks like and how this defined conduct will have a linkage to performance assessments and organizational goals and strategies.

Through awareness and education, the ITCI Team provides clients a path forward to better workplaces and a greater societal impact. We support our clients in creating a climate where everyone contributes and can do their best thinking to accomplish the mission. Through our facilitation and training, we create an environment where everyone is encouraged to participate, understand one another’s diverse points of view, and share responsibility. We are specialists in Diversity and Inclusion and are subject matter experts on Unconscious Bias Awareness and Organizational Culture Change Management. As your strategic partner, we will assist the City in effectively establishing and supporting your diversity initiatives to help you overcome pressing challenges related to unconscious bias and cultural competency. We are your collaborators in your organization’s development of best practices and processes that will become a permanent part of the culture of the Austin city government.

ITCI wants to be Austin’s partner in building a sustainable training and culture change program that can work to impact this reality while creating an organizational atmosphere where everyone is welcomed in the City and to help Austin grow and maintain/improve its 3 year status as, “...No. 1 place to live [in the nation]...based on affordability, job market and quality of life.”⁷

First Steps

Implicit bias awareness is the first step to creating an inclusive workplace. Having a critical understanding of how bias affects decision making in your organization will result in better optimization of talent and better overall outcomes. There is immense value in having a diverse workplace when it is combined with an inclusive work culture. With new and varied backgrounds comes more knowledge, perspectives, and insights, thereby ensuring that the City will appeal to a broader constituency while resulting in increased innovation, creativity, recruitment, and retention of talent. The richness and depth that comes from varied races, ethnicities, ages, genders, experiences, religions, and abilities, translates into becoming a sought-after employer and the City of Austin as a place to live and grow.

⁶ Ethnic and Racial Minorities & Socioeconomic Status. <https://www.apa.org/pi/ses/resources/publications/minorities>

⁷ US News & World Report. “Austin, Texas, is the No. 1 Best Place to Live, According to U.S. News & World Report” April 2019. <https://www.usnews.com/info/blogs/press-room/articles/2019-04-09/austin-texas-is-the-no-1-best-place-to-live-according-to-us-news>

ITCI's goal is to provide a world class consortium of talented professionals and consultants that work smoothly and efficiently to design and deliver customized solutions to complex problems organizations experience as they innovate, grow, and their employees and customer base/constituency become more diverse. The ITCI Team has designed and delivered over workshops and training programs in 300 Implicit Bias, Workplace Bullying, Workplace Violence, Civility & Professionalism, and leadership training programs using top-tier Subject Matter Expert (SME) trainers and consultants. Providing thousands of hours of employee training and development, and organizational change management and assessment to large and small organizations, both government and private industry, ITCI and its experienced team of thought leaders and talented professionals continue to make the difference in employee and organizational development.

Through strategic relationships, ITCI specializes in customizing and delivering high impact training and consulting services using proven design approaches that are creative, inclusive, engaging, and accelerate learning and information retention. Our training is designed to easily adjust for individual organizational needs to ensure employees receive support where they need it most. For each of our Team members, this work is personal to them in that they too want to see more inclusive communities because they are a part of the greater community.

From our Lead Consultant Mindy Gulati, JD, Austin Resident

"Austin is my home. I work here, live here, and raise my two children in this wonderful city. I serve this city in many capacities and I am passionate about addressing the racial inequities that persist. I spend my days counseling Austin businesses, law firms, and non-profits on issues surrounding diversity, equity and inclusion. I work daily to make Austin a welcoming and inclusive place. I want this to be known as the best city in America for everyone. I want my children to choose Austin as the city where they raise their children as well. When I was asked to serve on the Mayor's Task Force on Institutional Racism and Systemic Inequities, I proudly and diligently took on that role in order to affect changes in my city. I recognized that there were issues that could not be ignored or downplayed, and I invested my energy into the Task Force. I authored key sections of the finance and industry report and have stayed engaged and active with the task force.

When this RFP was released, I watched with some anxiety because I know that whomever is selected for this project has a great responsibility. They must know the City of Austin, they must be dedicated to ensuring the real issues of racial inequity that face our city are confronted in these implicit bias conversations; they must be authentically connected to the city and people living here, and they must have an ethical core guiding them – not just bottom line figures. There are community groups serving our communities of color that are speaking out about their experiences – these voices must be understood. There are women of color in Austin writing publicly about their experiences in Austin – they must be heard. In Austin, we face issues of gentrification, loss of many diverse neighborhoods, the confederate naming issues we encountered last year, the mail bombings that struck fear in our city, particularly in the communities of color they impacted, continued concern over access to justice in our court system, police accountability, and access to job and wealth generation in historically underserved communities. These issues weigh heavy and will inform how our implicit bias conversations will be crafted and conducted.

My anxious feelings also stem from how much the city of Austin means to me personally. I am raising multi-ethnic children in this city. Issues of racial equity and understanding implicit bias are front and center in my life. I have a lot riding on how we as a city address these issues. My husband, a UT business school graduate and lifelong Texan still gets asked where he is really from. My Muslim and Hindu immigrant in-laws face immense pressures of belonging even though they have been in Texas for 40 years. I am a white mother understanding that my children will not benefit from the same systemic privilege that I exist in. I, myself, live in The Best City in America, but do my children and husband? Black and Brown Austinites? Women? I am committed to making sure that answer is "YES".

With this backdrop, when I was approached by Skip and his team to join this effort to support the City of Austin in their program for implicit bias and cultural competency training, I felt the anxiety fade as a door opened for me to have a prominent role in leading this effort to ensure the City gets the best, most effective set of experts to guide and craft an innovative implicit bias program that will be informed by my deep love for and connections to this city, the people who live here, the local groups that push for equity and racial justice, and with my ear to the ground to the pulse of the city I love. I am committed to this project, to this city, and to seeing this through the recommendations of the task force that I committed to serve years ago."

As noted above, a differentiator that makes the ITCI Team an excellent choice to be the City's partner in this initiative is the fact that we utilize the expertise of a variety of facilitators, trainers, thought leaders, and subject matter experts that do not "work out of a box", but can create a customized framework for this engagement. We are not tied to one approach; we are constantly evaluating best practices and new and innovative ways to reduce implicit bias and increase cultural competency. It is not just another job to us; it is our life's work.

What We Know

Everyone holds unconscious beliefs and biases about various social or identity groups. No one is immune from bringing their life's experiences and perceptions with them to work every day, filtering their encounters and creating experiences through these historical and personal lenses. We derive these biases from the human tendency we all have to organize our social world by categorizing people and things. We are trying to make sense of the 11 million pieces of information per second our brain receives, when we are only able to cognitively process about 40 of those per second. We are each reminded almost daily of the way that our unconscious mind processes issues of race, gender, sexual orientation, ethnicity, and other group identifiers that intersect with our judgment in our daily lives. Sometimes these lead to incorrect assumptions, overreactions, or failures to treat a person the way they should be treated as a human being.

No one is immune to these biases; they are hardwired into our mental DNA. Various social groups may be as conditioned as anyone else by stereotypes and unconscious expectations, even as they relate to the social group they belong to. This is why implicit bias is often incompatible with one's own conscious values - which is why people often deny they have specific implicit biases. ITC's Implicit Bias training and consulting explains why all human beings have bias and that it is a part of the basic human condition; this is now established by research in neuro-science and social-psychology. Bias derives from prior encounters, false information, assumptions, groupthink, media influences, urban legends, our upbringing, and/or what we have been taught.

As we have noted, this must be a team-based approach that involves all levels of the organization and decision-makers. Otherwise, focusing on individuals or units can cause what is known as "bias backlash" where diversity and inclusion messages can be perceived as threatening to members of a dominant group. Research shows that there are several ways that bias backlash stands in the way of organizations that create programs and tools to address bias. However, when you address all forms of bias no matter the source, and you focus on the outcomes of biased-based decision making such as how it stifles creativity and innovation, reduces an organization's ability to problem solving, etc., it reduces the likelihood that bias backlash will occur.

When individuals and organizations fail to be mindful and pre-judge people by the color of their skin, their gender, or perceived social group and not based on who they actually are as an individual, they miss out on the best talent and the best interactions that can solve previously unsolvable problems or come up with the best new ideas; those a homogenous workplace may not think about. By bringing their whole selves and talents to the table, people can present the freshest perspectives and hit just the right notes. We also learn to work closely with people that do not look like us to enhance creativity and innovation that is needed in our VUCA (volatility, uncertainty, complexity, and ambiguous) world.

Organizations must learn how to create a culture of inclusion, competency, equity, and mindfulness where co-workers, stakeholders, and constituents are treated in a respectful manner in all encounters. If employees are too busy focusing on what the person looks like or their perceived identity group membership instead of what they have to offer, employees in the organization remain mired in their individual problems or beliefs and the organization will fail to grow.

Our Process

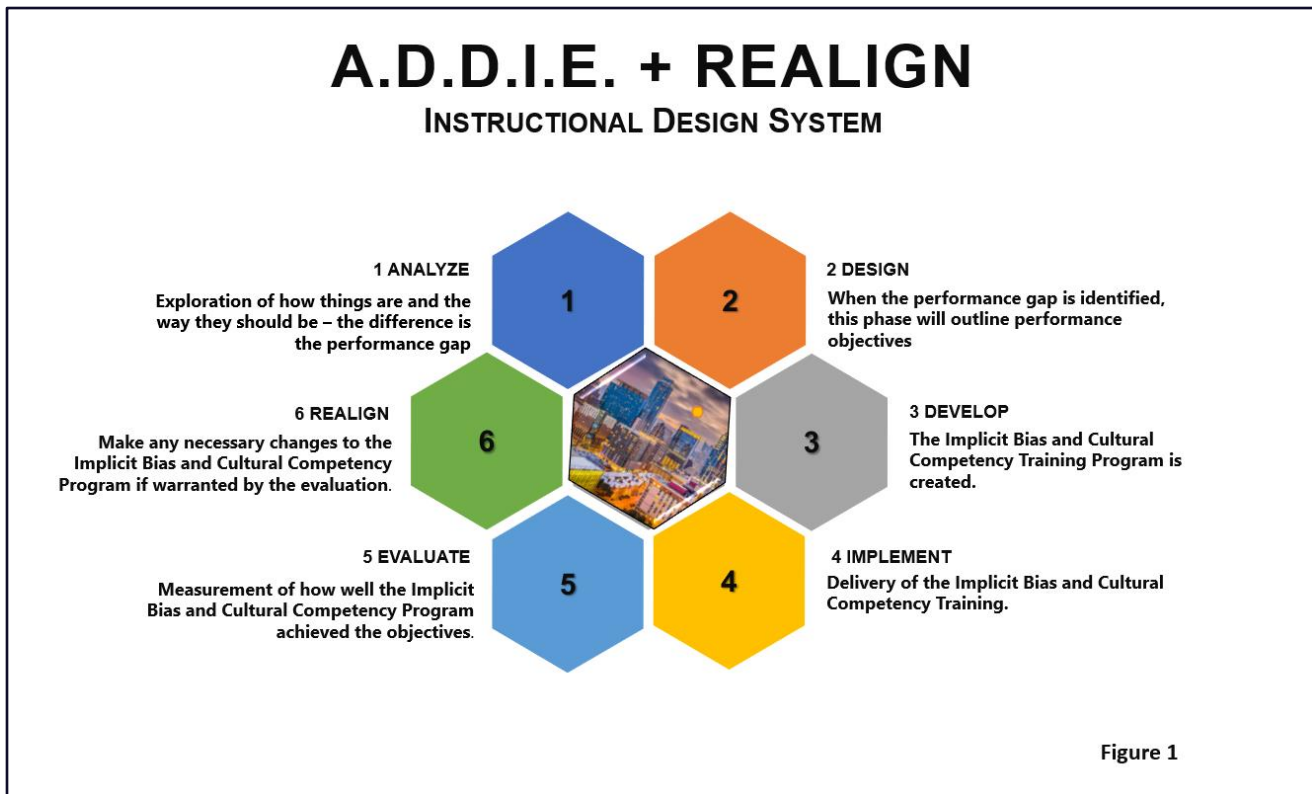
Understanding the context of the City is a process. This process determines factors which influence the organization's purpose, objectives and sustainability as well as our partnership with the City to accomplish its goals in providing this comprehensive training and cultural change. The environment of the City, which our process addresses, will consider internal factors such as values, culture, knowledge, onboarding, current and planned training, and individual and collective performance of the organization. It also considers external factors such as cultural, socioeconomic, and hierarchy frameworks that exist within the City's constituency where their employees generally come from. Examples of the ways in

which an organization's purpose can be expressed that we will be reviewing are its vision, mission, strategic plans, policies, procedures, objectives, exit interviews, stakeholder interviews, and commendations and complaints at a minimum.

Initial Organizational Assessment/Environmental Scan Overview

In order to effectively achieve sustainable organizational change and to become a more culturally competent, inclusive, and bias-free workplace, you must first begin with assessing the current state of the workplace and its employees' readiness for change. The ITCI Team knows that a comprehensive understanding and assessment of your culture, policies, practices, and behaviors is a crucial first step.

At the individual and organizational level, the ITCI Team will use both qualitative and quantitative methods to conduct your organizational assessment and environmental scan. In order to achieve this, we use an industry standard process of assessment known as the A.D.D.I.E. Model, plus a Realign phase.⁸ (Figure 1)



Although A.D.D.I.E is traditionally associated with creating instructional design systems (IDS), we have found it invaluable in utilizing the concepts throughout our engagements to conduct organizational analysis as well, which is the foundation for training and organizational change management development. Utilizing the A.D.D.I.E. Model throughout this process will ensure the development of the training solution and associated program(s) are consistent, systematic, efficient, effective, and can be readily recreated for multiple audiences and utilized diverse trainers. Adding Realignment to the process which includes learning retention strategies, ensures that the best and most useful ideas are continually incorporated into the program to support its sustainability and applicability.

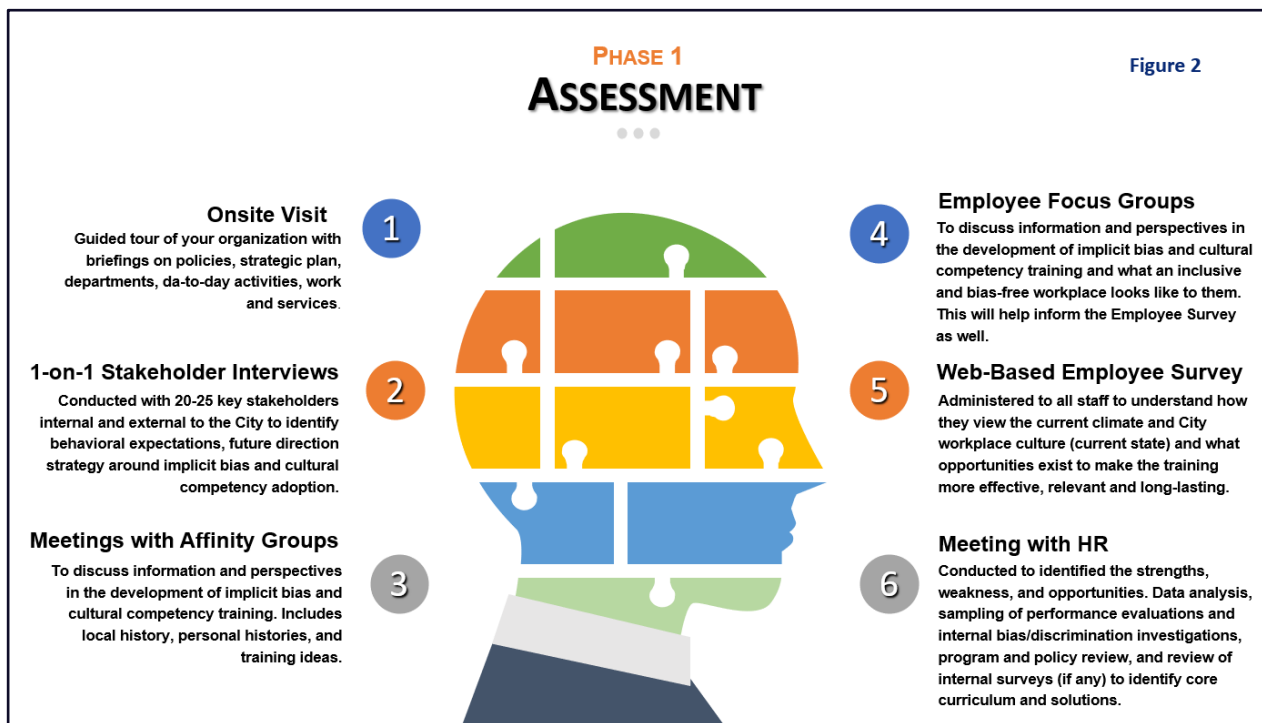
⁸ Ibid. This supports the 2023 *Adaptive Philosophy & Equity* that notes in the Process Recap that, "As we learn what works and does not work, we adjust and strive for better." Pg. 5

Through this lens, we will determine the effectiveness of your current equity, diversity and inclusion efforts and associated HR strategies (recruitment, selection, onboarding, continuing development, employee review, promotions, internal assignments, etc.), and identify gaps and opportunities for improvement. Without clear and objective criteria with which to evaluate all aspects of HR strategies, bias will remain largely unchecked within an organization's people processes which are the major touchpoints for sustainability within the organization. This baseline data provides us a framework in which to offer solutions, strategies, create the training program and to establish measurable outcome

Each phase of the A.D.D.I.E. model and how the ITCI Team incorporates them into our training and program design are explained below. Following this best practice helps the City achieve a successful program on both the individual and organizational levels while providing a measurement tool to evaluate ITCI's effectiveness as your strategic partner and program administrator.

Phase I – Organizational Assessment

Figure 2 describes our approach in conducting your Organizational Assessment. The goal of this assessment is to understand the City's *current state* as it relates to cultural competency and implicit bias so that the final recommendations for your Program incorporates all suggestions, ideas, and agreed upon priorities based on these findings.



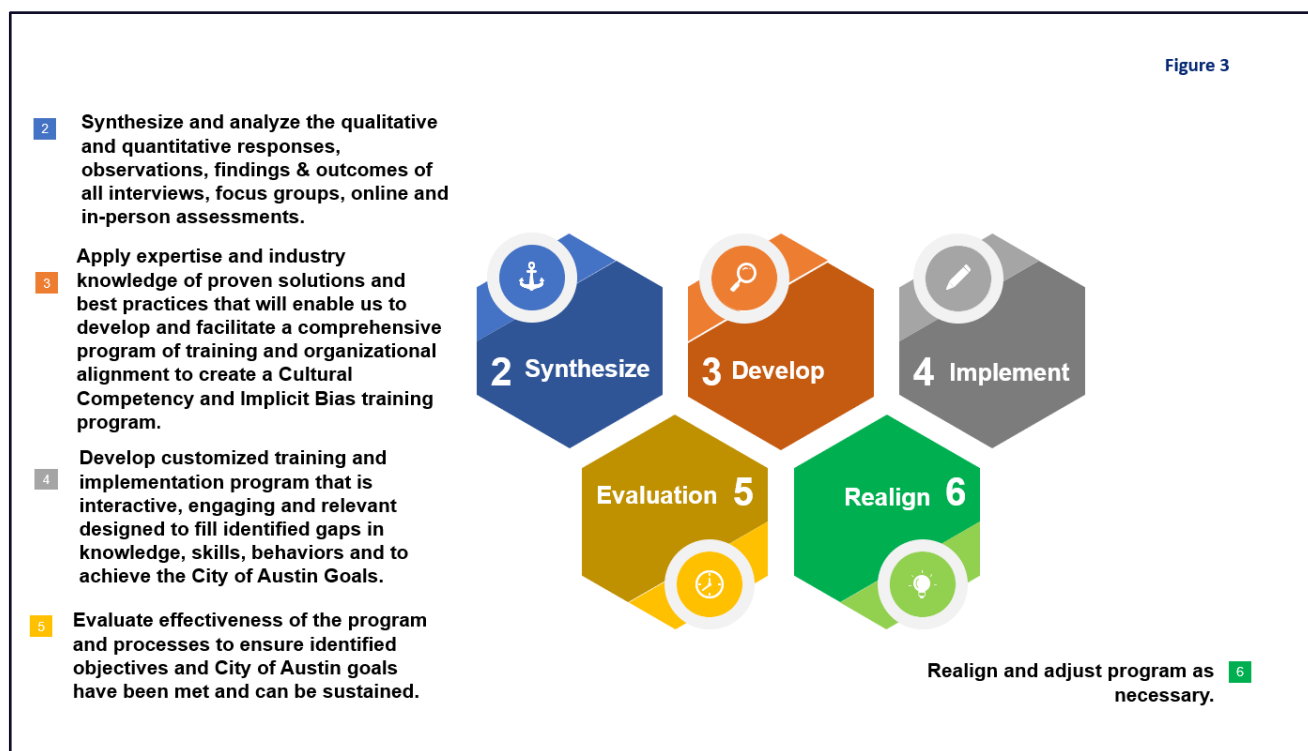
Our initial assessment will begin at the micro, individual and organizational levels. Using both qualitative (interviews, focus groups, etc.) and quantitative methods (surveys, etc.), we will assess the current climate in your organization, the readiness/appetite for change, and the level of cross-cultural competence and bias reduction strategies that are employed among your top leaders at this time. We will look to assess at a minimum:

- Rewards/Recognition
- Employee Involvement/Decision Making
- Job Security/Commitment to Workforce
- Training/Career Development
- Provision and Use of Resources
- Strategic Planning
- Innovation
- Work Environment
- Policy and Procedures
- Constituent Engagement
- Work and Family/Personal Life
- Performance Measures
- Leadership
- Teamwork
- Diversity
- Fairness and Treatment of Others
- Supervision
- Communication

At the macro level, we will employ the concept of Interested Parties which extends our focus beyond just the employees (who can be considered internal interested parties). This too will provide us a framework to ensure consideration is given to all relevant parties. Relevant interested parties are those that provide significant risk to organizational sustainability if their needs and expectations are not met such as community members and other governmental entities. Our training and recommendations reduce these risks. By attracting, capturing, and retaining the support of relevant interested parties the City depends on for its success will be critical to the achievement of this initiative.

ITCI utilizes industry standard assessment tools and benchmarks such as the Intercultural Development Inventory⁹ and the Global Diversity & Inclusion Benchmarks (GDIB), focus groups, surveys, and the collection of other qualitative and quantitative data. The IDI is the only theory-based assessment of intercultural competence that allows us to see an individual's or group's progression along a continuum of cross-cultural competence. It allows for an evaluation and provides valuable insight into the approach a person may likely use when he or she are personally involved in a difficult situation with another person. Questions are drawn from actual statements made by people from many cultures throughout the world. The wording and content of the items reflect a range of viewpoints toward cultural differences. This will be important for executives, managers and supervisors to understand how their communication styles can impact the work environment and contribute to or reduce bias in the workplace. These assessments are compared to other statistical data the City has collected. The information is important because when disagreeing with others, we often experience heightened levels of stress and anxiety; this can be amplified when speaking to people from another culture we are unfamiliar with. Learning to manage these conflicts increases employee engagement and productivity.

Once the initial organizational scan is complete, we will follow steps 2-6 in Figure 3 to create an effective and comprehensive program based on the City's requirements and needs.



⁹ IDI Assessment Website. <https://www.idiassessment.com/Dashboard/PublicHome?ReturnUrl=%2f>

Additionally, the initial surveys and selected focus group activities will be repeated post-training to assess behavior change and identify areas for improvement as outlined in Phase V – Evaluation.

Phase II – Data Synthesis

With the old adage of, *“What gets measured, gets done!”*, developing the appropriate metrics to quantify and realize the depth, breadth, and integrated scope of implicit bias reduction strategies and cultural competency practices will feature broadly in our approach to Program design and development. Working closely with the City Manager, Human Resources and the designated City team for this engagement, we will determine:

1. What core competency strategies for implicit bias reduction and cultural competency look like for the City and its employees based on the assessment data received in Phase I.
2. Align data with what the City is currently doing and what initiatives they have outlined for the future; and
3. Make expert recommendations to ensure the gaps are being addressed through this engagement.

A comprehensive report will be created from our data synthesis that will be provided to the City and discussed at length which will inform how we assist the City in implementation, training, and continued sustainability of the Program. This report will be designed to provide the City with a roadmap for their current and future employees that will guide their implicit bias and cultural competency initiatives to align with their 2023 strategies and beyond.

Phase III – Develop the Program

Based on the approved recommendations presented to the designated leaders from Phase II, a detailed and customized Program will be developed to achieve the desired outcomes of the City as it relates to the reduction of bias, cultural competency, and other areas identified in the design phase. This Program will be aligned to address all of the gaps and opportunities for improvement discovered in the Assessment phase. These will be aligned with the HR and Workplace Diversity Strategies that are in place and/or planned by the City. This will include at a minimum:

1. Developing a program for cultural change management and associated milestones, and what implementation metrics to apply to judge success and identify areas that require additional strategies;
2. Designing the conversation driven training curriculum and implementation structure for the different levels of the City workforce (Executives, Managers, Supervisors, Individual Contributors, and others the City may deem appropriate);
3. Developing a strategy to manage resistance to reduce the risk to the Program;
4. Seeking approval from the City; and
5. Making recommendations for other aspects of the overall Program.

Although you will find a robust training plan below that will be tailored to your specific needs, ITCI realizes that training is not enough to sustain a culture change. It must be supported throughout all levels and areas of the organization. The interactive classroom experience is only the start of the development journey. We also know that in order to achieve substantive and sustainable behavior or culture change, it will not occur with classroom-only training. Full culture and/or behavior change must be integrated into a larger organizational development strategy that includes the involvement and investment of supervisors, senior management, mentors, coaches, the employee, and other ongoing learning experiences that are reinforced over time.

We know that a comprehensive cultural competency strategy must touch many functions within the organization. Therefore, we use a framework that outlines key elements and integration points that must be considered if it is to have long-term organizational impact. These include:

- Continuous feedback collection
- Celebrate success
- Audit compliance
- Diagnose and address gaps continuously
- Look for continued resistance

***“People need to be reminded more often
than they need to be instructed.”***

**Samuel Johnson
Author**

- Linking cultural competency and bias reduction to performance
- Set/redefine targets and goals
- Assign accountability (Scorecards, Performance Management, Change Champions)
- Continuous reporting of progress and areas requiring improvement
- Update metrics
- Refresher training (instructor-led and online)
- Realign strategies to fit new situations

The metrics we will use to evaluate the successful integration and utilization of key points within the Program that are relevant to the City and its leaders are at a minimum:

- Employee Retention Rates
- Hiring Rates for Individuals from Culturally and Linguistically Diverse (CALD) Backgrounds
- Promotion/Leadership Assignments/Stretch Assignments
- Employee Satisfaction
- Employee Productivity
- Constituent Satisfaction
- Positive/Negative Public Relations
- Grievance Reduction/Complaint Reduction/Lawsuit Avoidance
- Innovation and Creativity (New Programs/New Way to Do Things)

We will use this framework along with the below outlined training recommendations as our basis for development and implementation of the City's implicit bias and cultural competency strategy and programming.

Training Program

The content of the training shall address at a minimum the following areas:

- Legal aspects of workplace diversity and inclusion
- The impact of Implicit (unconscious) Bias
- Building Cultural Competency to increase employee engagement, productivity, and constituent satisfaction
- The evolution of diversity and inclusion including the broad definition of workplace diversity and associated terminology, policies, and practices
- The business case for diversity & inclusion, including trends and best practices for City governments
- 21st century leadership for implicit bias reduction and cultural competency
- Sustaining a workplace of cultural competency and bias reduction

Our Implicit Bias and Cultural Competency training programs are facilitated in a workshop-type atmosphere with efforts made to have critical audience participation and honest dialogue. Developing this part of the program will include:

1. Developing the strategic training programs for the different levels of the organization:
 - a. City Executives
 - b. Managers
 - c. Train-the-Trainer for City Learning Professionals
 - d. Supervisors
 - e. Individual Contributors
2. Gathering and integrating meaningful feedback from the start, and throughout the engagement avoids roadblocks and ensures a comprehensive training and development program is in place; and

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3. Measuring progress in program implementation based on levels of attendance, changes in behavior, ITCI training, train-the-trainer and instructor success through constant evaluation and post training assessments.

We prefer conducting our training sessions for the executive and manager populations in small, intimate groups of no more than 15 participants, preferably 10. We have found this number to be large enough for many viewpoints but small enough to take a deep dive into issues that employees at this level face. It is also encourages sharing by all in attendance.

For supervisors and individual contributors, we recommend the number of participants not exceed 25, and preferably 20. Again, this allows better and more open communication. Within this level of the organization, we also recommend the supervisor and individual contributor groups be divided across the organization by class, and not necessarily by division. This, too, provides a more open communication platform where employees can talk about issues without direct peers and co-workers in the room. It also allows employees to gain insights into other departments and divisions within the City.

Ownership of the complete set of tools and training materials including instructor guides, handouts, and links to any video material/slides and the 3T materials will become the property of the City of Austin and provided in a format that is compatible with the software of the City.¹⁰

Implicit Bias Training Course

The ITCI Team understands that within the process of developing cultural competency, there must be an understanding and acknowledgement that as human beings, we all have bias and that it is a part of the basic human condition. These biases can be based on prejudices, encounters, false information, assumptions, groupthink influences, and/or what we have been taught. The important factor is to recognize we have bias and act mindfully to reduce its effect on our decision-making processes.

ITCI's Implicit Bias training defines what implicit bias is – a way we look at and react to situations to make sense of the world around us in a safe and familiar manner – but without realizing it. Perceiving and reacting in situations through implicit biases happens automatically. As it relates to our feelings about each other, it is driven by our hard wiring pattern of making decisions based on what feels safe, familiar, likeable, valuable and competent to us, and in many instances, without realizing it.

Bias occurs whenever we have a perception of threat to our own survival or a threat to our physical or property safety, identity or sense of being. It has developed in humans to distinguish a “safe” from “dangerous” situation or thing, which is a basic quality of our human nature to categorize and group information quickly so that our brains can make sense of them. Micro-inequities and other forms of unintentional bias can have a detrimental effect on the relationships between City employees and the community they serve. Further, unrecognized and unchecked, implicit bias has a negative impact on decision-making, problem-solving, situational reactions, productivity, engagement, working relationships, morale, provision of services, and team cohesiveness.

To minimize bias, especially in service encounters and within the workplace/workgroups, City employees must be able to see bias in themselves. No one is immune from bringing their life's experiences and perceptions with them to work every day, filtering their encounters and creating experiences through these historical and personal lenses. Generally, people do not intend to be bias. However, our actions, although unintended, can have a devastating impact on how the community views the City and its perceived motivations. This can lead to an employee assuming that the person they are interacting with is too sensitive and thus treating future encounters with people similarly situated the same, which in itself can create bias by both participants.

¹⁰ Upon delivery of the materials and at the conclusion of the contract, ITCI and its subcontractors, facilitators, trainers, and others involved in the development of the training Program, known and unknown to the City, shall be released by the City of all liability for the use, delivery, distribution, changes, amendments, and such other usage of the material provided to the City.

Bias, both explicit and implicit, can be cumulative and the detrimental effects of micro-inequities and other forms of unintentional bias can quickly turn a community against the City and its leaders. Similarly, if bias is left unchecked internally within an organization, it can have a similar effect on morale and work performance.

To fully understand bias, training and discussions around the ideas of unearned advantage and disadvantage where some groups receive the benefit of the doubt, while others have to overcome negative bias to be considered equal, capable and valuable must occur.

ITCI will create a safe space in which an honest and open dialogue with executives, managers, supervisors, individual contributors, and our expert instructor-practitioners and ultimately, the train-the-trainers can actively explore the concepts of bias as an academic pursuit of understanding and acknowledgement to support the City's 2023

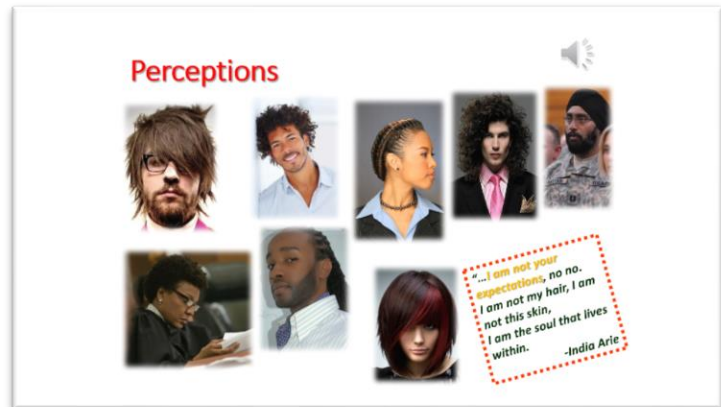
strategic priority, *"Culture & Lifelong Learning: Being enriched by Austin's unique civic, cultural, ethnic, and learning opportunities; and Government That Works For All: Believing that city government works effectively and collaboratively for all of us – that it is equitable, ethical and innovative."*¹¹

ITCI utilizes "real-world" Case Studies and examples of how easily these damaging effects occur and provides opportunity to work through examples while learning to minimize their occurrence and/or overcome them when they occur. By receiving this training, employees at all levels of the City workforce will better understand why they have the reactions and take the actions they do and bring those forward for discussion and review. ITCI's training reduces implicit bias in decision-making, internal and external touchpoints, and strategic thought processes. This learning will support the City's *Guideposts* found in 2023 that states, *"Be in service to Austinites and each other and Learn along the way."*¹²

ITC's Implicit Bias course provides the City with training and tools to work with those different from themselves, thereby increasing their professionalism and fostering a greater sense of trustworthiness with those whom they interact.

The course will discuss at a minimum:

- What is Implicit Bias, where does it come from, and how does it manifest in individuals and organizations?
- How does Implicit Bias differ from Explicit Bias?
- What is the impact of Implicit Bias on the culture and fabric of the workplace?
- How to recognize the negative impact that bias has on an organization and how it impacts team dynamics, effectiveness, morale, productivity, respect, communication, trust, and collaboration.
- Why is it important for the City of Austin workforce to become aware of Implicit Bias and reduce its damaging impact?
- Why is learning about Implicit Bias important to you as an executive/manager/supervisor/individual contributor?
- What are the managers' and supervisors' roles in addressing and reducing Implicit Bias in the workplace?
- What is the individual employee's role in addressing and reducing Implicit Bias in the workplace?
- The power of micro-inequities and micro-messages.
- Why addressing Implicit Bias is necessary for an Inclusive workplace.
- Strategies for becoming aware of and overcoming Implicit Bias in yourself and others.
- Implicit Bias and its impact on Diversity & Inclusion.



¹¹ Ibid. City of Austin Strategic Direction. Our Strategic Outcomes. Pg. 6

¹² Ibid. Process Recap. Pg. 5

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- Brainstorm strategies for applying Diversity awareness, understanding, and skills.
 - Activities to discover blind spots.
 - Best practices for addressing bias in a culture change initiative.
 - How to lead and manage conversations that can often be awkward and uncomfortable.
 - How to manage resistance in the training room.
 - How to allow for and encourage ongoing dialogue and insight that contributes to a positive, engaged and bias-free workplace.

Cultural Competency Training Course

Cultural competence refers to the ability to honor, respect, and be actively aware of issues surrounding race, beliefs, interpersonal styles, social, behaviors, language diversity and related challenges of that are faced by marginalized populations that have historically been underserved. This includes employees that are providing such services as well. Cultural competence is a dynamic, ongoing developmental process that requires a long-term commitment and is achieved over time; it must be practiced. Cultural competency is a set of behaviors, attitudes, and policies that enable an organization to work effectively in cross-cultural situations and provide professional services to a diverse constituency. It requires individuals to confront stereotypes and bias and acknowledge the value of differences.

When City employees are culturally competent, they can better serve the community by bringing a level of empathy and understanding of the situation a community member may find themselves and will have a better opportunity to build positive relationships with those they serve. This provides a platform by which the community can appreciate and gain a better understanding of why an employee performs their job in a particular way. Each person in the interaction can view these actions and responses through a lens of mutual respect and understanding. Cultural competency is an essential ingredient in decreasing disparities in the provision of services and *“Appreciation, respect, and welcoming of all people and cultures.”*¹³

Cultural competency increases employee engagement which increases productivity, innovation, and work project outcomes. It can reduce conflict and provide a platform for more effective work collaborations and provision of services. When disagreements and controversies occur, employees will again use the lens of cultural competency, understanding, and trust to make a more measured assessment of the situation, giving each person in the interaction the benefit of knowing that their decisions are not made based on bias, but on competency and thoughtfulness. When employees make decisions that are based on cultural tolerance where they recognize in advance that they will have to work with a diverse population, can accept the reality that different cultures exist within the organization and the community they serve, that they may not always see things in the same way that others do, and they seek to learn and value these differences, they have now developed the foundational principles of Cultural Competency.

Like the communities they serve, the City is becoming more culturally diverse. Fostering cultural competency internally within the City and its departments will provide a platform for more effective workplace communications, innovation, creativity, and collaboration. Thus, as an added bonus, when employees feel that they too are valued and respected by their organizations for their individual diversity and culture and are encouraged to bring their whole selves to work, they will carry this feeling of good will and respect into the interactions with the community members when providing services. Drawing on the wisdom of a diverse workforce, organizations are better able to understand and meet the needs of the community[ies] they serve.

By developing City employees' cultural competency, the employees and those that support them are able to effectively and competently operate within the community they serve that may not be similar to them in many ways. It provides the community with a certain measure of faith that the City and its employees understand the community's population and needs and can provide professional services based on this knowledge. Providing City leaders, managers, supervisors, and individual contributor populations with the training and knowledge to work with a community that does not necessarily look like them will increase positive community relations.

¹³ Ibid. Indicator D. Pg. 23

The course will discuss at a minimum:

- Why is becoming culturally competent important to the City of Austin?
- Why is becoming culturally competent important to you as an executive/manager/supervisor/individual contributor?
- Why is it important to delivery culturally competent services to the Austin Community?
- How does an organization become culturally competent and responsive to the needs of their community and employees?
- What is culture?
- What is race?
- What is ethnicity?
- What is cultural identity?
- The importance of cultural competence to an Inclusive workplace.
- How achieving cultural competency requires addressing Implicit Bias.
- The role of trust and emotional intelligence in developing cultural competency.
- Best practices for identifying and supporting change champions with the all levels of the City organization.

Train-the-Trainer Course

The Train-the-Trainer (3T) course is designed to have ITCI master trainers coach the City Learning Professionals (CLP) in how to facilitate the course curriculum that we have developed for Supervisors and the Individual Contributors. This 3T course will build a pool of competent CLP instructors who can effectively and with confidence teach this material to other employees. This allows for multiple courses to be instructed at a time, provides for a diversity of training styles, and reduces training fatigue that would inevitably set in for one or two instructors that would have to teach this course to more than 11,000 employees. ITCI also recognizes that this is a significant cost reduction strategy for the City in that these employees are already in-house.

In this 3T course, CLPs will receive their required training which experiencing and interacting with our training professionals as they teach, complete exercises, and conduct role plays contained in the Implicit Bias and Cultural Competency training. Each CLP will also have the ability to practice instructing the Implicit Bias training in a supportive and learning environment. Our training experts and the CLPs will utilize the best practices in the 3T process as outlined below:

- City motivation to present training;
- Instill purposefulness;
- Understand the methodology in the development and delivery of the training;
- Present information effectively;
- The difference between training and facilitation;
- Respond to participant questions with knowledge and confidence;
- Lead activities that reinforce learning and cross-cultural interactions;
- Encourage relevant experience sharing;
- Direct participants to supplementary resources and reference materials;
- Lead discussions;
- Listen effectively;
- Make accurate observations; and
- Effectively explain course materials and how they are relevant to job requirements and the future direction of the City.

In the design of this course, we understand that the CLPs may have various levels of experience with this topic and/or with training overall. However, at a minimum, ITCI recommends that CLPs chosen for this Program have at a minimum:

To be effective in achieving intended outcomes, prospective 3T participants must be highly qualified, seasoned trainers who have demonstrated the following: • An advanced skill level in training and facilitation skills and engagement of adult learners. • Success in the field and champions for the topic area. • Completion of the entire training workshop. • Ability to deliver the training when needed (flexible; able to travel).

With this in mind, ITCI believes that it is also important to take this opportunity to reinforce instruction skills that maintain interest and ensure successful knowledge transfer:

- Adult learning principles;
- Principles of Action Learning;
- Having a positive attitude;
- Maintaining eye contact;
- Speaking in a clear voice;
- Active listening;
- Using appropriate gesturing;
- Application of participant engagement strategies such as brainstorming, questioning for understanding, and role playing;
- Use of appropriate levels of intervention when managing difficult training situations;
- Address disruptive participant behaviors;
- How to avoid barriers to learning;
- Understanding course assessment and evaluation; and
- Personal training and facilitation enhancement and practice.

CLPs will also receive:

- A pre-assessment to measure their level of knowledge about training;
- Pre-work in the form of reading assignments and City policy and procedure review;
- Trainer and participant agenda;
- Course evaluation instruments and explanations;
- Facilitators Manual; and
- Thumb drives with all presentations and supporting documentation.

Once the CLPs have been trained, ITCI facilitators will audit at least 10% of the course instruction to ensure they are conducted in the manner in which they were taught to facilitate them. Additionally, during the lifetime of the contract, CLPs can contact the individual ITCI facilitator for guidance and further instruction as required.

Phase IV – Implement

The ITCI Team considers the best approach to this engagement is to create a highly collaborative and engaging learning environment with all levels of the City. Through ITCI Team consultants, facilitators and trainers, our goal is to ensure all information gathered throughout our assessments and designs are incorporated into our training and overall Program recommendations for culture change to the City.

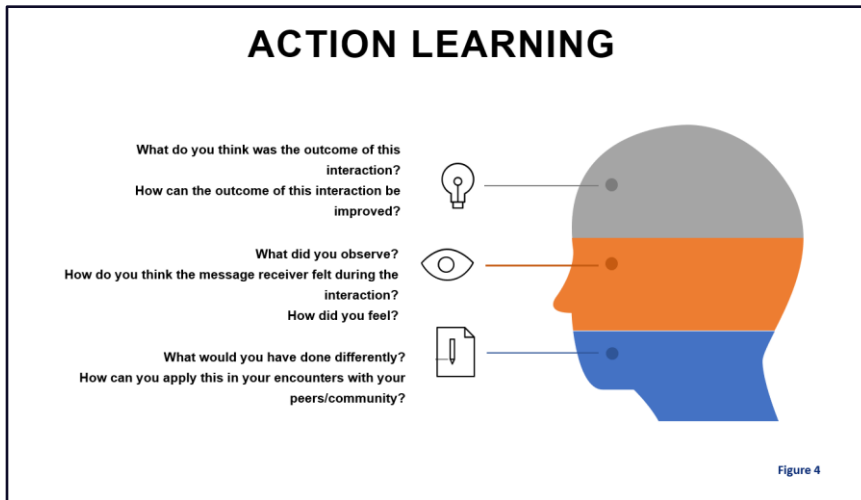
As we move from assessment, design, development to implementation, every step involves learning and rethinking the way things are done. To create this environment and incorporate the best practices, methodologies, processes, training programs and long-term culture shift strategies, ITCI works in partnership with all levels of the City to employ Action-Learning as a core process supported by individual and organizational assessments, classroom instruction, and updated HR/RM policies. The ITCI Team creates a dynamic, flexible, and improvement-driven infrastructure to maintain the momentum created through this program.

Why We Use Action Learning

Action Learning or Experiential Learning (Figure 4) incorporates thoughtful and thought provoking questioning to support implicit bias and cultural competency capabilities across the City departments as a part of the organizational development (OD) program. Combining Action Learning with OD has been recognized as supporting continuing professional development of high-potential professionals and future leaders. It is our belief that participants learn more effectively by observing and practicing those desired behaviors in a classroom or group setting with a concentration on communication strategies.

The Action Learning approach supports the idea that powerful learning can occur in organizations when they are challenged by questioning prior assumptions and “the way we have always done things” mentality. All content is based on Adult Learning Methodology, and encourages employees to continuously do, learn, utilize, and reflect on the outcomes of their actions related to implicit bias and cultural competency, and what they can improve on.

The use of experiential learning which is the basis for action learning finds its foundations in real-world, job-related simulations and serious games that provide realistic experiences from which city employees will derive new knowledge and skills. Participants also take part in providing their peers with both positive and developmental feedback when they observe interactions or learning exercises.



This not only helps to individualize and customize the participants learning experience, it also helps them prepare for the real world in which they work and interact with others. These experiences allow employees to gain new knowledge and skills through hands-on practice in low-risk environments.

Learning more creative ways of thinking, feeling, and being is achieved in action learning by reflecting on what is working now as well as focusing on actions that can be improved. Action learning is consistent with positive psychology and appreciative inquiry and encourages

team members to build on strengths and learn from life's challenges. The ITCI Team works closely with City staff to develop this program, to ensure information provided is relevant, and to confirm solutions can be effectively implemented by the City to further reinforce the desired behaviors.

The ITCI Team's curriculum employs classroom discussion, group exercises, videos, music, and reading assignments (at the executive and management levels). Incorporating Action Learning questions throughout the development, implementation and facilitation processes allows City employees at all levels of the organization to reflect on their assumptions and beliefs and reframe their choices to explore fresh ways of accomplishing their goals and seeing the world differently. In addition, participants are taught how to give bias-free developmental feedback to their peers, which is a skill development that translates to employee reviews for their direct reports that are based on performance without implicit bias seeping into the review.¹⁴ This also assists City employees in providing bias-free services to the community and other stakeholders they may encounter as a part of their everyday assignments.

Through observation and assessment, participants will view video and live simulations that allow them to critique the outcomes and provide insight into how they felt watching the encounters. In the appropriate setting with very careful moderating by the class facilitator(s), we also ask participants to reflect and share difficult experiences they have had. This provides the added benefit of soliciting feedback from their peers. With the utilization of Action Learning principles, it allows for all participants to recognize and value the diversity of experience, knowledge and life skills each person brings to the training and those they will interact with in the workspace. Action Learning is also a great mechanism to teach others to train to material they may not be familiar with. We will be utilizing this approach in our train-the-training program. Modeling course curriculum is helpful, but, when the instructor can relate his or her experiences to what they are teaching, they are more passionate and engaging which increases the retention rate for new information.

An additional benefit of Action Learning is knowledge retention. Reports show organizations do not fully benefit from the

¹⁴ <https://hbr.org/2019/01/why-most-performance-evaluations-are-biased-and-how-to-fix-them>

training that employees receive. Although information retention may not seem like a big problem, thousands of hours go to waste as employees answer questions and look up information repeatedly even though they have received training in these areas. More than 40% of employees stated they spend at least 15 minutes searching for information they have previously discussed. This may sound insignificant but when considering the size of Austin with more than 11,500 employees, the potential loss of productive hours can exceed 120 in 1 work-day.¹⁵ A prominent component of our program outlined below will be to create pathways and connections for continuous learning, to ensure employee's retain what they learn, and are able to apply it in their interactions internally with colleagues and externally with customers and other stakeholders.

Additional experiential learning components that we will also recommend for the City's Program are shadowing opportunities, regular "Lunch and Learn" programs, micro-learning, adventure learning, and virtual and live simulations. These processes stimulate and expand the City employees' critical thinking skills and mindfulness which are important to sustaining a bias-free, culturally competent, creative, innovative, and service-oriented organizational culture.

When participants are experiencing the nature of their true work environment through skill practice and simulation in the classroom, it will strengthen their leadership abilities and build confidence when confronting difficult situations in their own environment. Through the use of mindfulness and practicing how to reduce the urge to prejudge someone they do not know productivity will rise and employee and constituent satisfaction will rise.

Through Action Learning, employees enhance self-esteem, understand some of the motivations behind how a person responds to a situation, reduce bias, and learn new and improved skills to support the strategic goals of the City of Austin -- such as, *"How might we foster and model relationships of trust, welcome diverse viewpoints, and confront racism at all levels (personal, cultural, and institutional) in our community and in our organization."*¹⁶

Phase V – Evaluate

To assess the effectiveness of the training and overall programmatic processes prior to City-wide implementation, the ITCI Team will use the 2016 enhanced version of the widely utilized Kirkpatrick Training Evaluation Model (Figure 5) for in-depth evaluation of programs of this scope.¹⁷ The Kirkpatrick Model described below will be utilized to ensure the training content developed meets the stated goals and objectives of the City and ITCI.

There are 4 levels in this model, including: Reaction, Learning, Behavior and Results.

Level 1: Reaction

Research shows if employees feel training is valuable and engaging, and they receive regular reminders of what they learned through emails, follow-up discussions, webinars, book reviews, etc., they tend to retain more of the information. When evaluation and reminders do not occur, most employees quickly forget what they learned; sometimes within 24 hours of the training being given. Measuring how engaged they were, how actively they contributed, and how they reacted to the training helps the City of Austin understand how well employees received the training. Additionally, following up with the employees 2, 4, 6, 12 months out to measure their level of retention and implementation is a critical component of any training program. This enables making improvements to future programs, by identifying important topics that might have been missing.

¹⁵ Entrepreneur Online. *How to Help Employees Remember What They Learned in Training*. 2017. <https://www.entrepreneur.com/article/289499>

¹⁶ Austin Strategic Direction 2023. Culture & Lifelong Learning. Challenges We Face. 2. Pg. 23

¹⁷ It must be noted that each course will have an evaluation component to it that is completed by the individual participant at the conclusion of the course and synthesized into a usable report. However, a Kirkpatrick Evaluation goes beyond just tabulating course evaluation responses and is more complicated and time-consuming. Both evaluation models will be utilized where appropriate and as agreed upon by the City.

Questions to ask City employees will include:

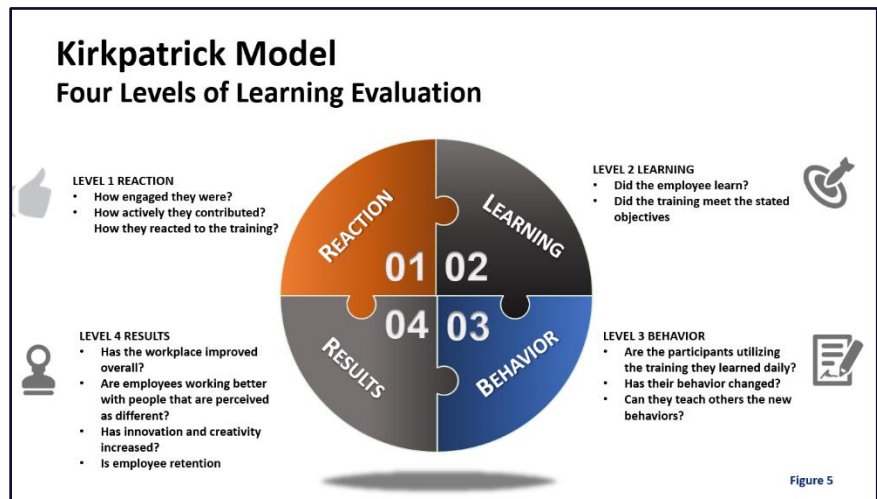
- Did you feel that the program/training was worth your time?
- Did you think that it was successful?
- What were the biggest strengths and weaknesses of the program/training?
- Did you like the venue and presentation style of the training?
- Did the training session accommodate your personal learning style?
- Were the training activities engaging?
- What are the three most important things that you learned from this program/training?
- From what you learned, what do you plan to apply in your job?
- What support might you need to apply what you learned?

When identifying employee's reactions to the training provided, a variety of methods can be used. We use employee surveys, course evaluations, and our expert facilitators watch participant's body language during an actual session and immediately asks for verbal feedback. This data is collected, tabulated and analyzed to make course/material adjustments throughout the project to ensure the information being provided is relevant and useful.

Level 1 Evaluations

Assumption #1:

There will be either 5 or 6 separate Kirkpatrick Level 1 evaluations (depending on client choice) for the different programs, to be completed for these training populations; the first 5 are required by the RFP. The 6th is not required in the RFP – but, it is highly recommended because it provides feedback to City Executives on 3 critical matters:



- The success and effectiveness of the Supervisors/Individual Contributor sessions as a whole;
- The effectiveness and competency of the different trainers relative to one another as trainers; and
- The effectiveness and competency of different trainers in meeting City objectives in enhancing employees' skills in cultural competency and recognizing/sensitivity to Implicit Bias.

Required Level 1 Evaluations:

1. Manager/Executive Trial (pilot) session - one 12-hour session (approx. 10-15 attendees)
2. Manager/Executive sessions - (approx. 10 -15 attendees per 12-hour sessions)
3. Train-the-Trainer (3T) Trial (pilot) session - one 24-hour session (approx. 10-15 attendees)
4. Train-the-Trainer (3T) sessions - (24 hours each - 4 days) - approx. 100 trainers
5. Evaluation of trial (pilot) of a 1-hour conversation-driven tool that supervisors can use to continue the discussion on bias and its impact

Optional but Recommended Level 1 Evaluation:

6. Individual contributor/supervisor sessions – 6 hour classes (approximately 400-480 sessions)

Assumption #2:

Each of the evaluations identified above utilizes a different assessment tool, and each tool must be tailored to the activities and content of the particular session. (There will of course be commonalities between the tools.) These Level 1 evaluations will not be just "smile sheets" – but rather they will be assessment instruments enabling participants to provide in-depth feedback on the class they attended.

Each of these assessment tools will ask participants to react to and assess:

- Instructor performance, competency, credibility, preparedness
- Content of class – appropriateness and quality of materials
- How well class met stated objectives/participant learning needs
- Value/relevance to their job and to the city function they work in
- Value of session in meeting City's objective of impacting current values and helping to bring about culture change
- Suggested additional training needed on topic and/or for this population

In addition, for the Train-the-Trainer (3T) assessment, we will assess:

- Instructor comfort level with materials, and effectiveness in teaching/delivery of course materials
- How well they prepared trainers to teach the material
- How well they taught trainers to present specific elements of the material and manage the emotions/dynamics in the classroom
- How well they role-model and emulate the behaviors/attitudes we want employees to have regarding bias in relationships between different groups

Further, for the executive/managers session assessment:

- Effectiveness in presenting materials from a managerial perspective to address issues around race, ethnicity, gender, culture, values, and conflict
- Instructor competence/credibility in the eyes of the executives/managers

For 1-hour session on the conversation-driven tool that supervisors can use:

- Effectiveness in teaching supervisors and role-modeling for them how to conduct the 1-hour employee conversation sessions

NOTE: For each of the assessment processes, ITCI will tabulate all responses and provide a report to management on the results, what they mean, and suggested next steps. The responses to be reported on include both:

1. Closed-ended (1-5 Likert rating) items, which most questions on the evaluation forms will be; and
2. The narrative/qualitative comments volunteered by participants.

Level 2 Evaluation (Required)

Train-the-Trainer (3T) sessions - (24 hours each - 4 days) – for approx. 100 trainers

In addition to the Level 1 evaluations described above, the RFP requires conducting a Kirkpatrick Level 2 evaluation for the Train-the-Trainer (3T) sessions. This post-training instrument will measure the level of knowledge retention and skill mastery of all trainers who attend the 3T sessions and will be teaching the Individual contributor/supervisor sessions.

The instrument will include primarily closed-ended questions (multiple choice and True-False). However, in order to test key skills, it will also include a small number of open-ended questions requiring participants to explain how they would react in selected classroom scenarios.

This instrument will be designed by the same ITCI Team subject matter experts who design the 3T sessions. It will be scored based on their guidelines. The instrument will contain 25 closed-ended questions and 5 open-ended questions.

Required tool: Framework/metric for departments to continuously assess the level of culture change in work groups

We suggest a managerial-level assessment checklist of approximately 10 culture change items that serve as dimensions that the City desires to see employees enhance their skill levels and behaviors in regard to positive culture change and bias reduction. An example of such a dimension might be "Responds in an inclusive/respectful manner to all coworkers and customers." The instrument would have a pre-training rating to be given on a 1-to-10 scale, and then a post-training rating on the same scale, 3 to 12 months after the training has been provided and at other intervals implemented by the City after the close of contract. The objective is for members of the work unit to achieve a higher rating on this scale over time, as they apply the learnings from the training and are coached.

Phase VI – Realign (Continuous Learning)

Employee growth and sustained results are a process of *continuous learning* long after the training sessions have ended

A major issue for any training program is ensuring employees retain knowledge received from the initial training sessions and then apply that knowledge and the practical skills taught, to their daily tasks. The ITCI Team uses the following approach to accomplish this objective - and further expand employee knowledge and skills.

How to Maintain Training Success After the Initial Training Is Completed

By not letting time elapse between the training and application of that knowledge, we avoid issues with learners forgetting what was learned. After initial training is completed, the City of Austin can do the following to leave a lasting impact on learning and employee development:

1. Evaluate the Training – Have Training Objectives Been Met? Each training program is evaluated—Pilot (trial) programs are evaluated at the conclusion of each training day, while the curriculum once rolled-out, is evaluated at the end of each program –at Kirkpatrick Level 1. (Train-the-Trainer will also be evaluated at Level 2, Mastery of material). We report to the City how successfully the training was delivered in the eyes of participants and provide the City with proven practical strategies for implementing these next steps.
2. Learning Application – ITCI sees the initial training not as the end of the learning but as the beginning of applying the learning received. This requires employees to apply what they have learned immediately following training. This will require supervisors and managers to develop and foster situations where these new skills can be applied as they learned in their specific training courses.
3. Post-Training Impact Survey – Within 12 months of an employee participating in the training courses, ITCI in cooperation with the City will conduct a computer-based survey to ascertain the level of retention of the core principles that were taught and how the workplace has changed or remained the same. We will also ask employees to provide information on an encounter where they believe the courses attended assisted them in a potential challenging situation.

This will provide the City with a reference point for the efficacy of the training provided. This tool will be made available for continual use by the City.



BONUS--4 OPTIONAL ITCI Post-Training Micro-Learning Services That Require NO Additional Funding

Team ITC will provide the City at NO EXTRA EXPENSE—an on-going Micro-Learning Curriculum to support and expand the initial Implicit Bias training program and encourage the continuation and acceleration of behavior and culture change in the City.

SAMPLE MICRO-LEARNINGS

- Blogs that provide examples of best practices of inclusion, communication, respect, bias awareness, and customer service
- Suggested books, videos, & current articles - with ideas on how to apply this information to City work practices and employee skill development
- A Monthly Conference Call with Team ITC Culture Change and Bias experts (targeted to City of Austin Supervisors, Managers, and select others)—addressing issues/challenges in implementing culture change and overcoming barriers/resistance to change
- Periodic ITCI Micro-Lessons expanding on topics addressed in the training - each will be 5-10 minutes - for example:
 - Moving Beyond Bias: 3 Proven Techniques
 - For Managers & Supervisors: 5 Crucial Rules of Successful Delegation
 - 4 Anti-Bias Strategies for Leaders
 - How Managers Can Role-Model Culture Change: 3 Behavioral Tools

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- Bias-Free Communication: 4 Rules for Employees to Follow

5 OPTIONAL ITCI Services That DO Require Additional Funding, If Desired

1. One-on-one Coaching for select executives, managers, supervisors and others on bias, conflict management, relationship skills, teambuilding, cross-cultural dynamics
2. Copies of the forthcoming Updated Edition of the Book: *“Moving Beyond Bias—Bias-Free Communication Strategies”*, Available at Volume Discounts
3. Half-day/Full day Workshops for intact City teams on Implementing Bias Awareness & Communication Best Practices
4. Half-day Workshop on selected focused managerial topics
5. Follow-up Half-day Workshop for Managers/Supervisors/select others on Culture Change Issues
6. Creation of an online refresher course

Part III. Program

The ITCI Team has outlined our Program approach in the following chart by tasks and steps we will take in proceeding from Task 1 to closing out the contract with the City. Most tasks will be concurrent, but some tasks will be dependent on information we receive and analyze in advance of moving to the next step. Each task and the results of the task will be kept in a spreadsheet to be provided weekly to the City. Meetings can be conducted via web-enabled conferencing or in person. All trainings will be in person.

DELIVERABLES/MILESTONES BY TASKS¹⁸

TASK No.	TASK	PURPOSE	TIME
1	Kick-off meeting with City Staff assigned to the project (1 Day via Conference Call)	<ul style="list-style-type: none"> • Introduce the ITCI Core Team. • Introduce the City Project Team. • Discuss and clearly identify the approved contract to include the Scope of Work for this project to ensure it is clearly understood by all parties per the contract. • Confirm the fee structure based on the agreed upon Scope of Work. • Discuss goals, objectives, timelines and projected completion dates for the project. • Identify all participants that may be critical to accomplishing the goals of the project including selection of Affinity Groups and other stakeholders • Select a date to meet with City staff in Austin to begin the on-site groundwork. 	Within 7 days of Contract Award
2	Develop a Comprehensive Communications Plan	<ul style="list-style-type: none"> • Identify clear channels of communication. • Identify key decision-makers. • Identify points-of-contact (POCs). • Identify how communications will be carried out. • Identify who has the authority to disseminate information and/or to what levels within the organization/outside entities. • Identify what communications will be disseminated surrounding this engagement, contact numbers, websites, etc. 	Within 7 days of Contract Award
3	Receipt and comprehensive review of employee data and related documents	<ul style="list-style-type: none"> • Identify, receive, and review existing documents to include City policy and procedures related to equity, discrimination, interpersonal interactions, customer touchpoints, strategic plan(s), hiring and retention strategies, performance evaluations, internal surveys and redacted investigations involving allegations of discrimination/bias, if any, and prior training . 	Within 14 days of Contract Award

¹⁸ All of the meetings outlined in the Project Approach and Deliverables refer to the major meetings that will require scheduling and a significant amount of time investment. There will be other meetings scheduled throughout the project for all parties involved. Unless otherwise noted, these meetings will be via conference call. If additional meetings are required on-site, additional fees may be incurred at the hourly rate.

4		<ul style="list-style-type: none"> All other policy documents, memoranda, etc., that have been generated to address equity, discrimination or bias, both internal and external to the City. 	
	Meeting at City of Austin with Staff assigned to the project	<ul style="list-style-type: none"> Discuss findings of the initial document review. Seek clarifications where necessary. Schedule meetings with one-on-one stakeholders to include senior level executives and managers, identified stakeholders, and others as recommended by City Staff and/or ITCI 	Within 21 days of Contract Award
5	Finalize Work Plan and Project Timeline	<ul style="list-style-type: none"> Discuss realigned objectives, if any. Reconfirm deliverables including timeline, milestones, quality control plan/checklist. 	Within 21 days of Contract Award
6	Develop a Risk Management Plan	<ul style="list-style-type: none"> Keep time and cost estimates within plan and contract. Ensure City feedback is taken into consideration at all levels of the project. Ensure roles and responsibilities are clearly defined and adhered to. Quickly address any changes or needs that may develop after the start of the project. Quickly address any new requirements that may be necessary after the start of the project. Ensure that resources are assigned, available, and committed to the project. Ensure that timelines and schedules are in place and adhered to. 	Within 21 days of Contract Award
7	Other Services	<ul style="list-style-type: none"> As recommended or requested to complete or compliment Scope of Work 	Within 21 days of Contract Award
8	Conduct one-on-one Executive and Stakeholder Interviews In-Person or Online	<ul style="list-style-type: none"> Interview of selected executives and other stakeholders to gain insight into the current state and initiatives to reach the desired future state. 	Within 28 days of Contract Award
9	Conduct In-person and/or Online Focus Groups	<ul style="list-style-type: none"> Affinity Groups Employee Population based on where they are located in the organization and duties (i.e., first responders, administrative, revenue generating, community impact) 	Within 30 days of Contract Award
10	Conduct Online Employee Engagement Survey	<ul style="list-style-type: none"> Engagement Survey for all employees to assess current state Readiness for Change Views on Leadership in this area 	Within 30 days of Contract Award
11	Analyze Data from All Assessments	<ul style="list-style-type: none"> Create report of findings Schedule meeting and present to Leadership Team Review recommended revisions to program 	After receipt of above information
12	Complete revisions	<ul style="list-style-type: none"> Complete revisions as required and discuss with City for additional review and approval 	Within 7 Days after

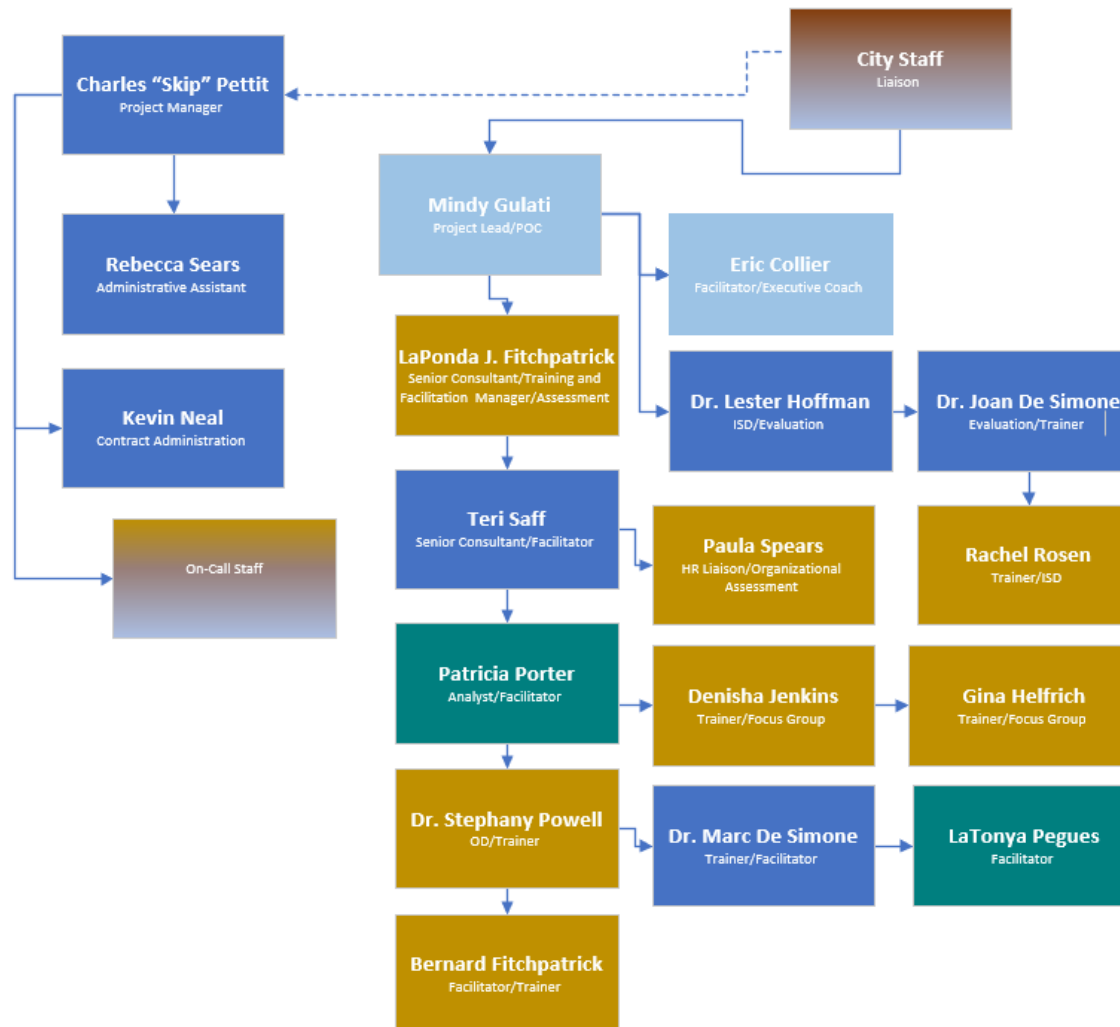
			completion of Task 11
13	Schedule meeting with selected City Staff	<ul style="list-style-type: none"> Discuss document revisions Receive approval to finalize Program and design for training of Executive and Manager populations, Train-the-Trainer populations, and Supervisors and Individual Contributors 	Within 60 Days of Contract Award
14	Design Training for Executive and Manager Populations	<ul style="list-style-type: none"> Finalize Design for Executive and Manager populations Review with City Staff for approval 	Within 21 Days of Task 13
15	Meeting with selected City Staff	<ul style="list-style-type: none"> Deliver final documents electronically for approval Schedule presentation meeting as necessary to discuss with staff Schedule additional work if required 	Upon completion of Task 14
16	Deliver Trial 12-Hour Executive and Manager Training	<ul style="list-style-type: none"> Trial course delivered to selected executives and managers Comprehensive evaluation review 	After approval of Task 15
17	Make Revision to Training of Executives and Managers	<ul style="list-style-type: none"> Revise training as recommended Send revisions to selected City Staff for approval Finalize training for the rest of the Executive and Manager Populations 	Within 7 days of completion of Task 16
18	Schedule and Deliver 12-Hour Training to Executives and Managers	<ul style="list-style-type: none"> Deliver training Review evaluations Make any changes as necessary throughout the trainings Seek approval from selected City Staff 	Within 7 days of Task 17
19	Design City Learning Professionals Training (Train-the-Trainer)	<ul style="list-style-type: none"> Design training, tools, guides, videos, etc. for train-the-trainer program Create a post-training assessment to measure knowledge retention Seek approval from selected City Staff Create Roll-Out Schedules and confirm with selected City Staff 	TBD
20	Deliver Trial 24-Hour City Learning Professionals Training	<ul style="list-style-type: none"> Trial course delivered to selected City Learning Professionals Comprehensive evaluation review <ul style="list-style-type: none"> Provide all materials, guides, aids, visual resources and tools to the City 	After approval of Task 19
21	Make Revision to Learning Professionals Training	<ul style="list-style-type: none"> Revise training as recommended Send revisions to selected City Staff for approval Finalize training for the rest of the Learning Professionals population Provide all materials, guides, aids, visual resources and tools to the City 	Within 7 days of completion of Task 20
22	Deliver Secondary Trainer Leader Participants Training (Train-the-Trainer)	<ul style="list-style-type: none"> Deliver training Review evaluations Make any changes as necessary throughout the trainings Seek approval from selected City Staff 	Within 7 days of Task 19
23	Assist City Staff with Rollout of Supervisor and	<ul style="list-style-type: none"> Work with HR staff and City Manager to facilitate an orderly rollout of program for 10,000+ city employees 	TBD

24	Individual Participant Training	<ul style="list-style-type: none"> • Develop plan to monitor a few sample classes • Make recommendations for any changes 	
	Design 1-hour facilitated conversation with workgroups	<ul style="list-style-type: none"> • Create a 1-hour conversation-driven tool that supervisors can use to continue the discussion on bias and its impact • Share program with selected City Staff for approval • Conduct trial of the program • Review evaluations • Finalize program 	TBD
25	Design a framework for departments to continually assess the culture/change in each workgroup	<ul style="list-style-type: none"> • Allows departments and workgroups to continue the conversation and assess changes in organizational culture based on outcomes of training 	TBD
26	Create a Glossary of Terms	<ul style="list-style-type: none"> • Create a glossary of terms to facilitate dialogue and ensure understanding of concepts 	21 Days after Contract Award
27	Create Final Report	<ul style="list-style-type: none"> • Create a Final report on the project • Recommend next steps for further implementation and future initiatives • Discuss additional work (if any) 	TBD
28	Close Contract	<ul style="list-style-type: none"> • Provide all necessary documentation, files and reports created in support of this project to the City HR. • Close out contract 	TBD

Compliance Statement

ITCI will comply with all applicable rules and regulations of Federal, State and Local governing entities. ITCI complies with the terms of this Request for Proposal (RFP).

Part IV. Project Management Structure



1. Skip Pettit of ITCI will be the Project Manager for this engagement.
2. Mindy Gulati will be the Project Lead and Primary Point of Contact (POC).
3. Patricia M. Porter is a woman-owned Texas HUB business as well as a certified WBE for the City of Austin.
4. We have included additional Austin based businesses as subcontractors for this engagement.



Part V. Prior Experience

Section 0700: Reference Sheet

Responding Company Name: International-Training Consortium, Inc.

The City at its discretion may check references to determine the Offeror's experience and ability to provide the products and/or services described in this Solicitation. The Offeror shall furnish at least 3 complete and verifiable references. References shall consist of customers to whom the offeror has provided the same or similar services within the last 5 years. References shall indicate a record of positive past performance.

1. **Provider:** International Training Consortium, Inc

Company's Name:

USDA Regulatory Agency—NRCS

Name and Title of Contact:

Sandra McWhirter - Project Manager/former EEO Director

Project Name:

EEO, Unconscious Bias & Reasonable Accommodation - 10-Hour workshops.

Present Address:

5601 Sunnyside Ave

City, State, Zip Code

Beltsville, MD 20705

Telephone Number Office : 301-504-2198 Cell 202-657-3514

Email Address: sandra.mcwhirter@wdc.usda.gov

Contract Type: Firm Fixed Price

Period of Performance: 2016-2017 (18-months)

Awarded Dollar Value: \$975,650

Description of Services Provided:

The contract was for up to 150 classes in 150 different RURAL locations in all 50 US States including Hawaii, Alaska and Puerto Rico—Completed in 12 months. In total 122 sessions were completed for 50 us states & Puerto Rico. ITC used 7 trainers. Teri Saff and Skip Pettit did the majority of the training. Skip Pettit & Dr. Lester Hoffman designed the course, the activities, the DVDs, the assessment, all materials. They also managed the team & the customer relationship.

ITC printed 3,000 3-ring notebooks with color graphics, compiled the books, shipped them to 122 locations, provided certificates for each trainer, created a web site for 24/7/365 use with additional bias and professional

development materials, evaluated every class each day and designed a Kirkpatrick-level 2 instrument for on-line use to assess the learning.

ITC successfully completed this project on-time and on-budget.

2. **Provider:** Mindy Gulati, JD

Company's Name:

State Bar of Texas

Name and Title of Contact:

Trey Apffel, Executive Director

Project Name:

Conversations on Implicit Bias

Present Address:

1414 Colorado Street

City, State, Zip Code:

Austin Texas 78701

Telephone Number: 512-427-1463

Email Address: tapffel@texasbar.com

Contract Type: Fixed Price/Hourly

Period of Performance: Ongoing

Awarded Dollar Value: \$30,000 to date

Description of Services Provided:

For the State Bar of Texas, we crafted a half- day training program and curriculum on unconscious bias and its impact on the organization as it relates to harassment and discrimination. This was given to the entire organization: all staff, managers and the executive team, and will soon be rolled out to the board of directors and particular sections of the state bar. From these trainings and conversations, codes of conduct and other compliance-related materials have been created and implemented with the guidance of Mindy Gulati.

3. **Provider:** Marc De Simone, Sr., Ph.D.

Company's Name:

Baltimore City Fire Department

Name and Title of Contact:

Alex Periconne Former Baltimore City Deputy Fire Chief (Ret)

Project Name

Culture Change, Diversity and Inclusion, and Race Relations Initiatives

Present Address:

Mayor's Office, City of Baltimore City Hall
100 Holiday Street

City, State, Zip Code:

Baltimore, MD 21202

Telephone Number: 443-324-3141

Email Address: BCFDEMS7@msn.com

Contract Type: **Employee**—Hired to Dr. De Simone Mayor's Staff to Direct Training for Baltimore

Period of Performance: **2013-2018**

Awarded Dollar Value: \$500,000

Description of Services Provided:

Diversity Cultural Sensitivity Training for Complete Fire Department - Community Liaison and Neighborhood Outreach between Police and Fire Culture Change, Diversity and Inclusion, and Race Relations Initiatives

Part VI. Personnel



CHARLES “SKIP” PETTIT, M.Ed.
President, International Training Consortium, Inc., Gaithersburg, MD
Unconscious Bias / Leadership / Diversity & Inclusion Expert, Author
skip@international-training.com
www.international-training.com

Project Position: Project Manager

Skip Pettit brings 25+ years of training and consulting experience to this project. He is an expert consultant and keynote speaker in the fields of Unconscious Bias, Cultural Competence, Diversity & Inclusion, Teambuilding, & Employee Engagement. His design and presentation of Unconscious Bias, Leadership, Diversity & Inclusion, Team Building, and EEO/Sexual Harassment & Prevention programs at world-class organizations such as Washington, DC, Baltimore County, Arlington County, VA, FDA, NIH, USDA, EPA, US Army, and elsewhere.

Skip is President of the International Training Consortium (ITC), a group of 100 top US trainers and consultants, offering global services tailored to today's cross-cultural/inter-generational organizations.

He co-authored *"Moving Beyond Bias: Success Strategies For The 21st Century"* and is finishing a new book on *"Power Secrets of Micro-Messages: 101 Strategies for Today's Leaders."*

Resided in San Antonio, TX after Medical training in US Army 1972-74

RECENT PROJECTS

Trained at Navy Post Graduate School—Team Building & Conflict Resolution (2018). Trained 1,000 Montgomery College Managers and Supervisors in EEO & Unconscious Bias in 2018. Trained 3,000 Managers / Supervisors / Executives all 50 US States—in Sexual Harassment Prevention & Awareness, EEO, Diversity & Inclusion, Unconscious Bias & Reasonable Accommodation (2017).

PREVIOUS PROJECTS

Designed and delivered for 20 consecutive years, Unconscious Bias, Sex Harassment Awareness & Prevention, EEO, Affirmative Employment, Diversity & Inclusion, Leadership, Supervision & Staff Development for Voice of America—the MOST DIVERSE federal agency with 110+ languages spoken per day in the workplace; trained 6,500 employees at Medicare & Medicaid in EEO & DEI, & Trained 5,000 public sector leaders/employees in Philadelphia & Mechanicsburg, PA in Unconscious Bias, Diversity & Inclusion, EEO, and Sexual Harassment & Sexual Assault. Trained 3,000 US Department of Education and 5,000 HHS personnel in DEI and Bias. VA—Office of Resolution Management (ORM), EEO Office and OHR Office—worked with VA hospital and HQ and Regional personnel to address Bias, Conflict in the Workplace, EEO Counselor training, and other D&I-related topics.

EDUCATION

Mental Health and Clinical Psychology degrees from Montgomery College & Antioch and 2 master's degrees from University of Maryland in Rehabilitation Counseling & Personnel Services.



MINDY J. GULATI
President, Equity Advocate, Managing Consultant
Fundamental Advisory, LLC, Austin, TX
512-409-5027
mindy@fundamentaladvisory.com
www.fundamentaladvisory.com

Project Position: Project Lead/Austin POC/Instructional Systems Design/Lead Facilitator/Trainer/Organizational Assessment

Founded in 2016, Mindy Gulati is President of Fundamental Advisory, a consulting firm focused on advising businesses and law firms on issues related to Diversity, Equity, and Inclusion. Using a unique and personal approach, she designs custom content for organizations on issues related to Implicit Bias and DEI, amongst others. Her approach provides the building blocks for cultural change through empathy, storytelling and understanding. She regularly tackles complex issues such as implicit bias, inclusion at work, compensation equity, harassment, and discrimination. Her legal background gives her a key advantage in understanding workplace implications for many of the issues she confronts.

As a former criminal defense attorney and subject matter expert on bias, she is passionate about fostering equity and inclusion through her work. She is intentional in the projects she takes and leaves a lasting impact on the organizations she works with. She has invested tremendous energy throughout her career sparking social movements for change through relationship-building and hard work, though her most profound joy comes from simply giving a strong, clear voice to those who may not always be heard. She prides herself on being a builder for others and recognizes that incremental improvement is only part of the path to success, not the finish line.

The Gulati Firm, CA & TX, Attorney & Owner

2010-2013 and 2015-2016

Managing attorney, focusing on comprehensive workplace investigation services and legal compliance for businesses and employment attorneys. Interview and review allegations of employee misconduct harassment, and discrimination and offer a detailed analysis of the case for action to be taken by employer and/or attorneys.

Office of the Public Defender, Orange County, Santa Ana, CA, Attorney

2007- 2010

Trial attorney, handled felony, misdemeanor and dependency cases, effectively and efficiently managed heavy caseload, researched, wrote and argued motions, made daily appearances in court, compassionately dealt with clients, attend numerous seminars in the area of criminal defense practice.

Office of the Public Defender, San Diego County, San Diego, CA

2004-2006

Certified Post Bar Clerk: Felonies August 2006-November 2006. Certified Legal Intern: Felonies, January 2005-August 2005. Legal Intern: Dependency, June 2004-August 2004

Office of the District Attorney of San Diego, San Diego, CA

2006

Public Affairs Assistant, January 2006-April 2006. Researched and composed speeches for the DA and staff, built and supported a community outreach program, scheduled speaking engagements, attended community events, communicated messages to the public and local political leaders.

EDUCATION

Juris Doctor, Cum Laude, Thomas Jefferson School of Law, San Diego, California, May 2006
Graduate Certificate from Center for Law and Social Justice

Honors & Activities -- Trustees Scholarship Recipient 2004-2005 -- LSAT Scholarship Recipient 2003-2004 Honor Roll -- 2003-2004, 2004-2005, Spring 2006 -- Pro Bono Honors Program Participant, with 95 hours Public Defender: Dependency Division -- Charles T. Bumer Civil Libertarian Award Recipient 2005 -- National Lawyers' Guild: President, TJSJ Chapter 2005-2006 -- Vice President 2004-2005
University of Utah, Salt Lake City, UT, Bachelor of Arts, Political Science and Women's Studies, 2002

COMMUNITY & VOLUNTEER SERVICE CURRENT

City of Austin Mayor Adler's Task Force on Institutional Racism and Systemic Inequities, Advisory Board Member, Finance and Industry Section
The Diversity Pledge, Austin TX, Contributing Author of Unconscious Bias Awareness Section
Lake Travis Progressives, Austin TX --President and Founder -- American Constitution Society, Austin TX Diversity Board Member
Institute for Diversity and Civic Life, Austin, TX Vice President, Board Member

LICENSES

Texas State Bar, #24081932; California State Bar, #246730; U.S. District Court, Southern District of California, 2017/2018

SPEAKING ENGAGEMENTS

Clexacon National Convention February 2017-- Las Vegas, NV "How Implicit Bias Affects the LGBTQ Community in the Media." -- Texas Democratic Party Fair Shot Summit, March 2017, Austin, TX -- "Engaging the Broader Movement." -- Mother Attorney Mentoring Program, June 2017, Austin, TX -- "How Implicit Bias Affects Attorneys: From Clients to the Courtroom." -- 3-day Startup International Conference, July 2017, Austin, TX -- "How Not to Become Uber: Creating a Diverse and Inclusive Company Culture From the Ground Up." -- National Industry Liaison Group National Convention, August 2017, San Antonio, TX -- "How Implicit Bias Affects LGBTQ Employees: From Inclusion to Gender Transitions". -- Austin Technology Council CEO Summit, September 2017, Austin, TX -- "Building Culture and Attracting, Growing, and Retaining Talent." -- Austin Technology Council HR Panel, September 2017, Austin, TX -- "HR Issues of Diversity and Employee Relations." -- Austin Bar Association CLE, October 2017, Austin, TX -- "Corporate Best Practices on Diversity and Inclusion Efforts." -- Solar Business Festival Conference, November 2017, Austin, TX -- "Response to Difference: Cultivating Diversity and Inclusion in the Workplace."

University of Texas Entrepreneurship Week, March 2018, Austin, TX -- "Creating Inclusive Cultures". -- Mother Attorney Mentoring Program, March 2017, Austin, TX -- "Dealing with Implicit Bias: A Practical Guide For Lawyers." -- Panhandle Human Resources Association Spring Seminar, April 2018, Amarillo, TX -- "Implicit Bias and Its Impact on Harassment and Discrimination in the Workplace." -- Austin Bar Association Family Law Section, May 2018, Austin TX -- "Implications of Implicit Bias on Family Law Practice." -- Women in Technology at Samsung, May 2018, Austin, TX -- "Storytelling to Overcome Bias." -- Scott Douglass & McConnico's Annual Partner Retreat. September 2018, Austin, TX, Keynote Speaker - - "Harnessing Your Power by Understanding Your Bias and Yourself."

2019 Speaking Engagements

Culturati Summit, January 2019, Austin, TX, WASHTO Civil Rights Training Symposium. -- March 2019, Austin, TX -- "Diversity, Equity, & Inclusion in Transportation."

Project Position: Senior Consultant/Training Manager/Organizational Assessment



CAPTAIN LAPONDA J. FITCHPATRICK (RET.)

Owner/Senior Consultant

LaPonda J. Fitchpatrick Training and Consulting for the Real World, Canon City, CO

aviationleo@gmail.com

www.trainingfortherealworld.com

Owner/Senior Consultant, LaPonda J. Fitchpatrick Training and Consulting for the Real World 2001-Present

Founded in 2001, Captain LaPonda J. Fitchpatrick (Ret.), SHRM-SCP, ACE, is the owner and senior consultant for her Human Resources Management, Aviation Security, Law Enforcement and Organizational Development firm. LaPonda is an internationally recognized aviation security and law enforcement expert and trainer with over 36 years of experience. She provides organizations with the essential tools and insights necessary to add value to their workforce. With a diverse consultancy of local, state, federal, and international aviation security, law enforcement and other organizations, both public and private, she develops policies and procedures for safety, security systems, methods and procedures, and emergency management; conducts security risk and threat assessments and develops field, classroom and online training courses.

Having a passion for Human Resources Management with a focus on non-discrimination, gender equality, diversity and inclusion, and unconscious bias, LaPonda helps organizations improve their service to both their internal and external customers by understanding that an organization is only as good as its culture and its employees. She performs organizational analysis, employee satisfaction surveys, provides employee coaching, develops and instructs on workplace violence and diversity and inclusion training among other Human Resources Management issues. She helps organizations provide their teams with the essential tools and insights necessary to add value to their workforce to increase their bottom line. Understanding the dynamic and diverse venue that a global system such as aviation presents, immediately post-9/11, LaPonda created an international aviation law enforcement training program that has been an industry standard for more than 17 years. She has trained well over 2500 police officers, TSA and other aviation security personnel across the country and internationally on their law enforcement and security responsibilities in the unique and diverse aviation environment.

Police Captain, Los Angeles World Airports Police

2004-2013

As her last command prior to retirement, LaPonda held the position of Commanding Officer of the Professional Standards Section where she was responsible for overseeing the maintenance, update, development, and review of all policies, procedures, employee conduct (Internal Affairs), employee training (police academy and continuing professional), hiring standards and police officer pre-employment investigations for over 1100 employees. LaPonda was the liaison to the Equal Employee Opportunity Coordinator and conducted and reviewed complex discrimination and sexual harassment investigations involving police and civilian employees through their conclusion. She served as a pre-disciplinary hearing officer and assisted the City Attorney with defending personnel decisions to the Civil Service Commission and in Superior Court. LaPonda had a unique role in that she represented both management and labor (union president) in collective bargaining negotiations and was a member of the City of Los Angeles Joint Labor-Management Committee that made recommendations on citywide collective bargaining contracts, employee administrative policy and procedures, and associated employee benefits.

She was also a founding member of the 65,000 Member California Peace Officers Research Association of California Ethnic Relations Committee created after the 1992 Rodney King incident to make best practice recommendations for community policing and providing services to diverse communities.

Throughout her career, LaPonda was responsible for ensuring the safety, security, and regulatory compliance of the global gateway known as LAX and its satellite airports for over 30 years. Always seeking improvement in processes and employee training, after the events of 9-11, LaPonda conceived and implemented the Los Angeles Airport Police Homeland Security Section to ensure multi-agency law enforcement and public safety activities and responses were properly coordinated with airlines, other tenants, and local state and federal law enforcement and public safety organizations, Customs and Border Protection, both the Transportation Security and Federal Aviation Administrations, and other stakeholders to reduce LAX's vulnerability to a terrorist event or catastrophic emergency. She also worked directly with airline corporate and ground security coordinators in support of their security needs and requirements. LaPonda developed the nation's largest airport law enforcement

bomb detection K-9 unit, expedited multi-agency intelligence sharing, and an on-site tactical response unit tailored to the aviation environment. She was responsible for writing and maintaining the Airport Security Program (ASP) and the Airport Emergency Response Plan (AERP) while ensuring overall compliance with security regulations and processes by the over 54,000 employees and hundreds of businesses that called LAX, Ontario, Palmdale (when operating), and Van Nuys Airports their home.

Core Competencies

Diversity & Inclusion, 360° Assessments, Stakeholder Engagement, Project Management, Law Enforcement and Public Safety, Personnel Management, Training Development & Delivery, Public Speaking, & Governmental Affairs

Registrations/Memberships/Affiliations

Society of Human Resources Management (SHRM), National Speakers Association Professional Member, American Association of Airport Executives (AAAE) Diversity and Training Committees, Airports Council International – North America (ACI-NA), American Society of Industrial Security (ASIS), International Association of Chiefs of Police (IACP)

Key Training/Certifications

SHRM-SCP, Cornell University Diversity and Inclusion Certification, 360° Assessments Certificate, PeopleMap 6 Leadership Coach Approach Program Certification, Coaching Using the Big Five Model of Personality Certificate, California Peace Officer Standards and Training Executive Development, Management, and Tactical Commander Certificates, Labor/Management Collective Bargaining Certificate, FEMA NIMS/ICS Certificates through 800, Managing Within the Law – Equal Employment Opportunity Certificate for California, Background Investigations Certificate, California Peace Officers Standards and Training LAPD Instructor Development Certification, Police Field Training Program Certification

EDUCATION

Bachelor of Arts in Sociology from the University of California Los Angeles (UCLA) with a concentration on globalization and diversity

AWARDS

National Black Police Association Outstanding African American Woman in Law Enforcement “Taking Charge of Change” Award, 2011, California National Guard Commendation Post 911 Operation Safe Passage Training and Military Deployment to Airports, 2002, Federal Aviation Administration, Certificate Contribution to Aviation Safety & Security 2002

RECENT PRESENTATIONS

Upcoming “In the Aftermath - Helping Employees After a Crisis” AAAE 91st Annual Conference, Boston, MA, June 17, 2019, “Disaster Readiness for Aviation” International Airport Review Airport IT & Security 2018 Conference, Amsterdam The Netherlands, December 4-5, 2018, Curacao Airport Partners 5th Annual Aviation Security Conference, Willemstad Curacao, May 30, 2018, “Active Shooter Preparedness” ➤ AAAE 90th Annual Conference, San Diego California, April 17, 2018, “The Business Case for Diversity and Inclusion in Aviation”

TRAINING COURSES

Diversity, Inclusion and Implicit Bias, Workplace Violence Prevention for Supervisors, Crisis Emergency Management for Administrators, Psychological Preparedness, Aviation Security for Law Enforcement Officers, Airport Employee Emergency Response Protocols, Airport Terrorism Identification and Response, Active Shooter Response, Airport Security Coordinator, Airport Certified Employee (ACE) – Security, International Airport Certified Employee (IACE) – ACEM.

RECENT CONSULTANCY

Subcontractor to Dr. Shirley Davis, SDS Global Enterprises, on the State of Massachusetts’ Center for Health Information & Analysis (CHIA) project to provide diversity & inclusion change management expertise, to include training development, employee engagement assessments, and organizational development strategies. Created a policy and procedure manual for the City of Shreveport Airport Police Department. Currently a consultant for policy, procedure, training, and police/security community engagement for the City of Albuquerque Sunport Airport.



TERESITA (TERI) SAFT, M.Ed., MS
Training Professional & Organization Development Consultant
International Training Consortium, Inc.,

Project Position: Trainer/Facilitator

A highly trained expert consultant in the field of Organization Development (OD) and Human Resource Development (HRD), professionally trained and experienced in group process consultation and group facilitation skills. A trainer and presenter with design, development, delivery, and administrative experience. Experienced with training program implementation, seminars, and workshops for people at every organizational level. Extensive experience in the areas of Performance Improvement (PI), Business Re-Engineering, Managerial Leadership, and establishing Learning Organizations. Also experienced in evaluating programs and personality testing. Teri is an Adjunct Faculty for Notre Dame, Johns Hopkins University, Gallaudet University, and Coppin State in the areas of Lean, 6 Sigma, Total Quality Management, Cultural Diversity, & Managerial Communication.

EDUCATION

PhD pending, Graduate work at University of Maryland, College Park – College of Education, Human Development Program.

Masters of Education in Special Education, Western Maryland College, Westminster, Md. 1988

Masters of Science in Counseling, Western Maryland College, Westminster, Md. 1988

Bachelor of Science Degree, Psychology, University of Central Florida, Orlando, Fla. 1985

Certified Professional Counselor and Mediator -- State of Maryland 2005

PROFESSIONAL SKILLS SUMMARY

Bias & D&I	Organization Development
Leadership Development	Team Building
Culture Change	Facilitation
Training / Presentation	Curriculum Development / Design
Communication / Languages	Program Development / Evaluation

State Government--Program and Curriculum Design, Presentation, and Evaluation

Managed State of Maryland's DHMH Training Development Center in Baltimore—Senior trainer and consultant for 15 years. Program development expert with 25+ years' experience in training and education. Skills include the creation and use of needs assessment instruments, focus groups, interviewing, flow charts, data, graphs, instructional aids, trainer's manuals, participants' manuals, and Train-the-Trainer materials.

Federal Government--Program and Curriculum Design, Presentation, and Evaluation

Managed VA Leadership Development Institute 2011-2015. Program development expert with 25+ years' experience in training and education. Skills include the creation and use of: Program Coordination, Keynote Speaking, needs assessment, designing 360 evaluation instruments, focus groups, interviewing, creating charts/graphs & tables; instructional aids, trainer's manuals, participants' manuals, and Train-the-Trainer materials.

COMMUNICATION SKILLS EXPERT – TRI-LINGUAL

Instructor and facilitator for interpersonal and communication skills. Fluent and delivers presentations in English, Spanish, and American Sign Language (ASL).

Project Position: Senior Consultant/Facilitator/Trainer



MARC A. DE SIMONE, SR., PhD.
Trainer/Consultant
International Training Consortium, Inc. (ITCI)

Dr. Marc A. De Simone, Sr., is a native Baltimorean who teaches leadership, theories, models, and practical applications as a collegiate professor at the University of Maryland University College. He is also a practitioner faculty member at the Johns Hopkins University. Marc is a master trainer and senior consultant with more than 35 years' experience in teaching, human resource development, and training. He was the City of Baltimore's Director of Training and Education in the Mayor's Office of Emergency Management and Public Safety. He is the author of a book using quality metrics, and co-author of three books - Empowering the Leader Within: Four Essential Virtues, and Sam Smith Star Spangled Hero, and Last Shepherd: A Novel.

Dr. De Simone helps organizations and teams achieve their Mission, while maintaining good Morale. Marc provides consulting on leadership to private and public sector entities. He is passionate about lessons learned from the past. He was selected as the Benjamin Quarles University Honors Scholar in History, and studied under Dr. Quarles at Morgan State University, where he was inducted into the Phi Alpha Theta International Honors Society for Historical Studies, and of which he was the President of the Eta Omega Chapter in 1976.

Marc is a senior consultant to various organizations in the areas of: Emotional Intelligence, Overcoming Conflict & Getting To You, Leadership Development and Management Training, Facilitation Skills Training, Strategic Planning, Instructional Systems Design, Needs Assessment, Task Analysis, Staff Development, Continuous Quality Improvement, Management Development, Program Evaluation, Change caused by the Application of Technology, and Organization Development. He has a diversified consultancy client base including: Pentagon, Executive Office of the President; U.S. Secret Service; CIA; Microsoft; Defense Logistics Agency (DLA); U.S. Department of the Navy (NAVSEA); Veterans Affairs (VA); NSA; Walter Reed Army Medical Center; U.S. Department of Education; FEMA; U.S. State Department (DOS); NASA .

EDUCATION:

Doctor of Philosophy, University of Maryland, College Park, (1994) - College of Education, Department of Curriculum and Instruction, Professional Development Program (concentration in Applied Behavioral Science in Organizational Settings). Doctoral course work included: Organizational Behavior, Human Interaction Skills, Managerial Communication Skills, Adult Education, Curriculum Development and Design, Group Dynamics, Conflict Management, Organization Development theories and interventions, Process Consultation, Instructional Systems Design, Program Evaluation, theories and models of Applied Behavioral Science in organizational settings, and training. Three Organization Development Internships completed.

Master of Arts Degree, Saint Mary's Seminary and University (1980) Education

Bachelor of Arts Degree, (1976) - Morgan State University, History

CURRENT POSITION/RECENT PROJECTS AND CONSULTING RESPONSIBILITIES

Instructor for the Leadership Seminar in the Masters' Degree in Education, and Masters' Degree in Management. United States Department of Agriculture, providing instruction in Staff Development and Training, HRD, OD, Leadership, Management Development, and Supervisory Training.

Adjunct Faculty, University of Maryland 2010-Present

Adjunct Faculty, The Johns Hopkins University, Carey School of Business, and Division of Public Safety Leadership 1999-2010

Police Executive Leadership Program, The Division of Leadership in Public Safety, and The MBA Program – Managerial Communication – Core Curriculum Course Teaching Managerial Communication skills to MBA candidates. Adjunct Faculty JHU Police Executive Leadership Program teaching Statistics, Project Management, Program Evaluation, Diversity, and other Management courses.

Professional Faculty Associate (Adjunct Associate Professor)The Johns Hopkins University, School of Professional Studies in Business and Education, Graduate Division of Business and Management 1995-2010

Master's Degree level courses taught at Hopkins include: (Guest Lecturer) -- Organizational Behavior, Group Facilitation, Organizations and Change, Leading the Changing Organization, Current Approaches to Organizational Change, Continuous Quality Improvement, Case Studies Practicum in Applied Behavioral Science, Organization Development: Theory, Context, Process, and Practice. Program Evaluation, Needs Assessment and Survey Research, Managerial Communications and Effective Negotiation Skills, Strategic Planning. Have attended several Faculty Development Seminars.

Graduate School – USDA – Premier Faculty Member, College of Notre Dame of Maryland, and Community Colleges

1995 to 2010

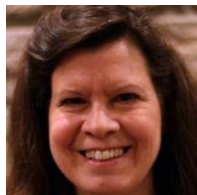
PUBLICATIONS

Brocato, R.C., De Simone, M. J., and De Simone, M.A., (1995) Empowering the Leader Within: Four Essential Virtues - A Process for Achieving Peak Leadership Performance, Virtus Press: Baltimore, MD.

Petersen, P., De Simone, M.J., and De Simone, M.A. (2001-2002) 3 Articles in management journal.

De Simone, M.A. (2004), Leadership Competencies and the Question of the Character of Effective Leaders – Working Title: Higher Powered Leadership: As If Character Mattered.

Project Position: Trainer/Instructional Systems Design



Dr. Joan De Simone, PhD.
International Training Consortium, Inc. (ITCI)

Dr. Joan DeSimone has been a faculty member at Johns Hopkins University since 1994, teaching classes in both business and education, especially leadership and management theory, organization development and strategic change. At the School of Education, she's engaged in partnerships in educational transformation, working with entrepreneurs engaged in innovative educational solutions to the challenges of school reform, as well as promoting excellence in educational settings. She is also a faculty member at the Johns Hopkins Carey Business School, where she teaches Managing in a Diverse and Global World, Groups and Teams Interventions, and Facilitating Strategic Change.

DeSimone is an organization development consultant and has worked with government agencies and for-profit and nonprofit organizations on the local, state, national and international levels. She has developed and implemented succession management and mentoring programs; leadership development, management development and supervisor development programs; continuous process improvement programs; strategic change management initiatives; and strategic planning endeavors, bringing a wealth of knowledge and experience to a diverse client population. Her research efforts reflect her commitment to social justice practices and inclusion, especially with vulnerable and disabled populations that include returning combat veterans.

TEACHING EXPERIENCE

**Adjunct Professor, Johns Hopkins University School of Education &
Johns Hopkins Carey Business School and Division Public Safety Leadership**

1994-Present

Leadership in Educational Organizations, Power, Politics, and Policy in Education, Human Development and Counseling, Entrepreneurial Education Leadership, Culturally Responsive Teaching, Managing in a Diverse and Global World, Groups and Teams: Interventions, Facilitating Strategic Change, Business Communication, Advanced Leadership Studies, Management of Human Resources, Managing Diversity, Leadership and Organizational Behavior, Introduction to the Change Process, Principles of Training & Development.

EDUCATION

Ph.D. 1994, University of Maryland College Park, School of Education, Department of Curriculum and Instruction, Division of Professional Development, Program Focus in Applied Behavioral Science in Organizational Settings.

M.A., Johns Hopkins University, Writing Seminars

B.A., University of Maryland Baltimore County

BOOKS

DeSimone, J., Brocato, R. C., Desimone, M. (1995). *Empowering the Leader Within: Four Essential Virtues - A Process for Achieving Peak Leadership Performance*. Baltimore, MD: Virtus Press Publications.

BOOK CHAPTERS

Harnett, C. and DeSimone, J. (2011). Managing the return to the workplace: reservists navigating the stormy seas of the homeland. In Kelly, D., Barksdale, S., and Gitelson, D. (Eds.). *Treating young veterans: Promoting resilience through practice and advocacy*. New York: Springer Publishing Company LLC. Orzolek-Kronner, C.A. and DeSimone, J. (2012) *Seeing through the eyes of the blind*. In Verzoff, J. (Rf.), *Falling through the cracks: Psychodynamic practice with vulnerable, oppressed and marginalized populations*. New York: Columbia University Press.

PRESENTATIONS

DeSimone, J., Returning Combat Veterans 60 Day Yellow Ribbon Reintegration Program, "Workplace Reintegration Challenges," Delaware National Guard, Baltimore, Maryland.

DeSimone, J., Metro Transit Police Lieutenant's Retreat, "Building Internal Relationships/Departmental Challenges," Washington Metropolitan Area Transit Authority, Columbia, Maryland.

DeSimone, J. (Presenter Only), Maryland National Guard Reintegration Program, "Workplace Reintegration Issues," Maryland National Guard, Turf Valley Conference Center, Marriottsville, Maryland.

DeSimone, J., Mid-Atlantic Public Health Scholars Retreat, "Leadership Development for Public Health Leaders," Johns Hopkins University Bloomberg School of Public Health, Baltimore, Maryland.

PAST CLIENTS

White House, US Navy, US Army, HHS, Transit Authority, City of Baltimore, VA, EPA, Department of Transportation, Washington Metropolitan Area Transit Authority (WMATA), NSA, CIA, and dozens of other large and medium-sized organizations

Project Position: Instructional Systems Design/Program Evaluation



Dr. Lester Hoffman, PhD

Author, Researcher, Thought Leader
International Training Consortium, Inc (ITCI)

Dr. Lester Hoffman, PhD, and former Faculty Member, Harvard University, is a nationally known expert on Unconscious Bias, Gender Bias, Cultural Competency, Diversity & Inclusion, and Leadership, working with world-class human resources, healthcare, and technical organizations for 25 years. More than 220,000 professionals have used Dr. Hoffman's learning materials. He has authored 2 books on Unconscious Bias and is currently completing his third book.

Dr. Hoffman has presented custom-designed workshops on Human Resources and Communication subjects at the graduate level at New York University's Management Institute, Columbia Graduate School of Public Health, the Fordham Graduate School of Business, Harvard University, City University of New York, the Albert Einstein College of Medicine, and other major institutions. He has lectured as an invited faculty member at 25 University-based Executive Development Programs nationwide, including: SUNY, RPI, Rutgers, Michigan State, Clemson, University of Maryland, Southern Methodist, University of Vermont, and William & Mary.

Dr. Hoffman has designed and delivered over 75 workshops on Unconscious Bias, cultural Competency, Diversity & Inclusion, Leadership, and Clear Communications for more than 20 federal agencies, including: FDA, National Cancer Institute, US Navy, NIH, EPA, Dept of Energy, Dept of Commerce, Brookhaven Labs (DOE), Census Bureau, VA, and FEMA.

In the public sector, Dr. Hoffman has worked on more than 60 separate consulting/training projects, including:

Goldman-Sachs - Developed training to enhance cross-cultural competency when communicating in writing with customers and colleagues in different cultures

Xerox - Created training to support a culture change initiative to communicate about services in customer-friendly language

Lockheed-Martin - Worked with all departments to create training and awareness for initiative to change culture to a "Quality is First" mindset

Merrill-Lynch - Developed cross-cultural communication training to enhance skills to write documents understandable by those in diverse cultures

Arrow Electronics - Created training, orientation, & simulations for company-wide program on Culture Change for Enhanced Customer Service

Healthfirst - Managed climate survey and culture change project for making major health insurance company more customer needs-driven and customer service quality-driven

Bank of America - Created training and Train-the-Trainer Modules for managers, supervisors, & employees for a 5,000 employee division for an initiative on changing organization's culture with new technology & processes

Avon Products - Created training to adapt to a culture change initiative and monitored progress throughout

Chase International Private Bank - Created training and onboarding processes for employees in 27 countries to enhance cross-cultural understanding and awareness to improve customer service

Dr. Hoffman and Skip Pettit published the first book on workplace bias, *"Moving Beyond Bias: Success Strategies For The 21st Century."* Dr. Hoffman also wrote a whitepaper, *"Anti-Bias Strategies for Leaders,"* commissioned by the Federal Council of EEO Officers. Dr. Hoffman and Mr. Pettit are currently finishing their new book, *"Power Secrets of Micro-Messages: 101 Strategies for Today's Leaders."*

RECENT PRESENTATIONS & PROJECTS

- Workshop for Senior Leadership: *Unconscious Bias Awareness for Senior Leaders*
- Workshop for Leaders: *Leadership Strategies for Overcoming Unconscious Bias in OIG Investigative Reports*
- Workshop for Senior Leaders: *Leadership Strategies for Positive Micro-Messages*
- Invited keynote speaker at EEOC Leadership Conference: *Recognizing & Addressing Unconscious Bias Toward Women in the Workplace*
- Keynote speaker at Diversity & Inclusion Thought Leadership Executive Conference, Washington, DC: *Overcoming Gender Bias / Empowering Women in STEM*
- Workshop for EPA: *Overcoming Unconscious Bias in Collaborative Scientific Research Projects*
- Workshop for FDA Scientists: *Collaboration on Diverse Scientific Writing Teams To Accelerate Creative Results*

EDUCATION

Columbia University in the City of New York, Bachelor's Degree, Summa Cum Laude, Member Phi Beta Kappa
Field of Study in Mathematical Logic, Philosophy of Language, European Intellectual History
Activities and Societies: Editor, King's Crown Essays Magazine; Contributing Editor, Columbia Spectator

Harvard University, Doctor of Philosophy (PhD), Master of Arts (MA)
Field of Study in Instructional Design, Learning Programs, Cognitive Psychology

Project Position: Facilitator/Executive Coach

Eric Collier

Certified Neuro-Transformational Coach (CNTC)

BottomLine Solutions, Inc., Austin, TX 78731

Cell: (240) 535-0506

eric@bottomlinesolutions.com



Professional Summary	<p>I have over 35 years' experience in coaching and developing managers and executives from my career at IBM and my coaching and consulting practice. I have coached top executives, middle managers as well as new managers and emerging leaders. I have also coached leadership teams to create synergy and alignment in support of mission, vision, values and goals.</p> <p>Currently, I coach scientists, managers and executives in the public sector.</p>
Coaching Approach	<p>We all have talent, natural abilities that are instrumental in our success. Future success will come based on continuously improving our versatility in the application of that talent. Talent along with personal core values, and temperament are foundational components of one's capacity to perform. In my coaching approach I work in partnership with my clients to expand their ability to apply their talent in achieving their personal and professional goals.</p> <p>I use The Seven Levels of Effectiveness as the architecture for performance enhancement. The Seven Levels provides a road map of human effectiveness. The roadmap is built on a solid foundation of current research in neuroscience and positive psychology, providing an easy to understand comprehensive model of human growth and development.</p> <p>Clients learn to apply research-based tools and mindfulness practices that train their brains to support increased effectiveness. These tools and practices provide the continuous renewal that fosters resilience, continuous growth, and overall wellbeing. My aim is to leave you able to be your own coach.</p>
Personal	<p>I was born and raised in Miami, FL. In my first job I worked for my father in his floor cleaning business. He paid double the minimum wage and only demanded excellence in return. His philosophy: "Be among best at whatever you do, and always have work. And if you never stop learning, you will be ahead of most people." He taught me how to build relationships that would grow and sustain a thriving business.</p> <p>I played sports growing up with a fondness for baseball also given me by my father. I continue to participate in the game as a player and a coach. It trains me to be attentive to nuance and disciplined in what I do.</p>
Education, Certifications and Affiliations	<ul style="list-style-type: none"> • Certified Neuro-Transformational Coach (CNTC); Licensed by BEabove Leadership to deliver training in the Seven Levels of Effectiveness and The Neuroscience of Effectiveness. • Mindfulness Based Stress Reduction (MBSR) Training • Facilitator in the Future Search Network • Myers-Briggs Certified • Executive Development programs at UVA's Darden School • B. S. in Management Science; Florida Atlantic University • DC Men's Senior Baseball League; Coach, Player, League Committee Member responsible for League Integrity; Hall of Fame Member. • Austin Metro Baseball League; Player • Treasurer, Austin, Texas Chapter of 100 Black of America • Mentor/Volunteer, Communities in Schools of Central Texas

Project Position: Analyst



NEGOTIATING CHANGE – EMBRACING CONFLICT – MAKING CONNECTIONS

Conflict Management Expert – Facilitator - Author



Patricia M. Porter, LCSW, ACC, ABW is the President of **Conflict Connections®, Inc.**, a woman-owned Texas HUB business as well as a certified WBE for the City of Austin. The business is headquartered in San Antonio.

Pattie has worked extensively in the dispute resolution field since 1994 providing mediation, facilitated dialogues with groups and teams, various training topics related to conflict competence, change and transition management, emotional intelligence, inclusion and cultural change. She is also a conflict management and abrasive behavior coaching for managers and leaders.

Patricia's extensive facilitation and training experience spans the public and private sectors with extensive federal and state government engagements. She serves as a senior practitioner and leads training teams in Train-The-Trainer programs for a number of federal agencies including NASA, National Archives, Transportation Security Administration (TSA), Department of Interior, and the Department of Defense. She has also provided similar services to San Antonio's River Authority, Edwards Aquifer, and Texas Department of Transportation. Patricia is a certified facilitator for the Soliya Virtual Connect Program endorsed by the United Nations to co-facilitate cross-cultural dialogues between Western and Middle Eastern/Muslim societies. She has engaged as a facilitator for San Antonio's Compassion and Tolerance forums.

As an experienced practitioner, Patricia serves as a formal mentor for organizational conflict and change management programs supporting the

growth and learning for Navy mediators, Air Force conflict coaches, facilitators and trainers. She is passionate about educating the every day person about how to handle conflict constructively. As a result, she founded and hosted a global online radio program for close to 9 years called *The Texas Conflict Coach®*. The Podcast Library can be accessed at texasconflictcoach.com. Patricia also teaches conflict management coaching and facilitation of group dynamics in the graduate program on Dispute Resolution and Conflict Management at Southern Methodist University (SMU) in Dallas, Texas.

Patricia is the author of two Minibooks™ *Stop The Dreaded Drama: 55 Tips for Ending Destructive Conflict* and, *Stop Avoiding Conflict: Learn How to Address Disputes Before They Erupt*.

Patricia earned her Bachelor's degree in Psychology and her Master's of Social Work. She is a licensed clinical social worker (LCSW) and is a founding recipient of the Academy of Advanced Practitioners (AAP) designation from the Association for Conflict Resolution (ACR). She is also an Associate Certified Coach (ACC) through the International Coach Federation, and a CINERGY® certified advanced conflict coach, coach-mentor and a Competency Assessor. The Boss Whispering® Institute accredited Pattie as an abrasive behavior coach (ABW).

LinkedIn: Patricia Porter

Facebook: ConflictConnections

Business Website: <http://www.conflictconnections.com>

Books Website: <http://www.endingdestructiveconflict.com>

Radio Website: <http://www.texasconflictcoach.com>

Email: pmporter@conflictconnections.com

Project Position: Instructional Systems Design/Trainer



510.637.9563 * spark@rachelvrosen.com * www.rachelvrosen.com



EDUCATIONAL TRAINING

2011	Stanford University	Stanford, CA
M.A. in Educational Policy Organization, and Leadership Studies		
2006	Austin College	Sherman, TX
B.A. Double Major: Psychology and Spanish		

CONSULTING AND LEADERSHIP EXPERIENCE

2016-present	S.P.A.R.K. Founder & CEO	Austin, TX
<ul style="list-style-type: none">Seasoned DEI (diversity, equity, inclusion) practitioner, strategist, and consultantCreated the successfully backed Kick-Starter product, S.P.A.R.K., an inclusive, interactive community-building card gameKeynote speaker and workshop facilitator on topics like: unconscious bias, intersectionality, equity, inclusion, systemic oppressionOrganized & facilitated 30+ S.P.A.R.K. community-building events and workshopsDesigned, prototyped, developed, & facilitated DEI leadership development curriculum & courses for 6+ cohorts of leaders centered on: facilitative leadership, coaching leadership, conflict-management, change-management, and leading with intentionalityBuilt capacity of leaders and facilitated multiple teams within the S.P.A.R.K. community, collaborating with team members and co-constructing strategic visions/goals for each product and projectConsulting clients and speaking engagements have included:<ul style="list-style-type: none">The National Equity ProjectUnited Way for Greater AustinNational Association for College Admission CounselingThe Texas State Auditors OfficeuShipBulldog SolutionsKeynote speaker for organizations like:<ul style="list-style-type: none">Austin Human Resource Management Association Annual Conference (2018)Michigan Association for College Admission Counseling		
2015-present	National Equity Project, Associate + Consultant	Oakland, CA
<ul style="list-style-type: none">Equity Leadership coach for school Administrators and central office executivesFacilitator with expertise in holding space for conversations about diversity, racial equity, inclusion, unconscious biasProject Lead for Designing and Facilitating the San Diego Unified School District Learning Partnership Equity StrategyCo-Designer, Co-Lead, and Co-Facilitator of the Leadership Fellowship Cohorts: 2015-20172015-2017: Associate, 2017-present: Consultant		

LEADERSHIP EXPERIENCE

2011-2015	Elmhurst Community Prep Middle School, Administrator	Oakland, CA
<ul style="list-style-type: none">Articulated and held a school change vision that tended to both the technical and adaptive aspects of the school's Theory of Action (diagnosed, strategized, and monitored whole school change management strategy).Designed, develop and held a vision for a Professional Learning series centered on equity and cultural competenceCoached 20+ teachers/leaders and developed/sustained high functioning leadership teams, focused on building team capacity as a school change and sustainability approach (i.e., fostered intrinsic motivation and collective learning and action) for all		

TEACHING EXPERIENCE

2006-2010	Castlemont High School Spanish + Entrepreneurship Teacher	Oakland, CA
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CERTIFICATIONS / INTERESTS

- NGLCC Certified LGBTBE
- Volunteer for Truth Be Told, an organization committed to changing the narrative for women in correctional facilities in Texas
- ASID UpClose Leadership Program Graduate (2019 Cohort)

Project Position: Trainer/Focus Group Facilitator



Position: OD Consultant, Diversity, Equity and Inclusion Strategist/Trainer

Denisha Jenkins, MA is a dynamic Talent Development professional with an extensive business acumen and 13 years of progressive experience building social equity, improving organizational systems, and developing culturally responsive and innovative leaders. Offering exceptional communication and interpersonal skills. Proven ability to foster mutually beneficial business partnerships, drive strategic diversity and inclusion initiatives, and successfully implement change in multi-disciplinary organizations.

Sample Projects:

- Pioneered a multi-faceted partnership between MIT and Singapore University of Technology & Design
- Managed 10 civic projects for the State Department
- Collaborated with community leaders to secure over 600K in grant funding to address disparities
- Increased employee engagement and satisfaction by 15% in one year
- Decreased turnover by 35% and decreased workers' compensation by \$7000 a year
- Built an internal dashboard to assess workforce satisfaction and drive wellness initiatives for 900+ staff
- Designed, launched and facilitated the first leadership development program at Integral Care
- Certified trainer in Crisis Prevention, De-escalation and Physical Safety Management
- Delivered conference presentations on topics including workplace harassment and suicide prevention
- Consulted businesses and churches on topics such as sexuality, gender, immigration and disabilities
- Conducted cultural research that supported bills drafted by House Representative Helen Giddings

OTHER WORK HISTORY

Kardia Advisory Group

Founder & Principal Consultant

January 2018 – Present

- Advised executives and middle management on topics/issues related to diversity, inclusion and equity
- Coached social sector consultants, ministers and executives on how to lead diverse teams
- Coached pastors, missionaries, founders and students on healthy cultural identity development
- Facilitated team building workshops on intercultural communication, mapping and microaggressions
- Designed and facilitated customized cultural competency trainings for upper and middle management
- Facilitated strategic planning sessions for non profit executives and board members
- Leveraged talent experience and demographics to improve supplier selections and relationships
- Identified gaps and developed strategies to reduce systemic inequity across teams and departments
- Created and revised diversity and inclusion mission statements and strategic outreach plans
- Partnered with marketing teams to curate assets that reinforce values around diversity and inclusion
- Assessed organizational learning needs through surveys, interviews, and internal consultations
- Developed organizational policies that aligned with diversity and inclusion best practices
- Served as a guest speaker for panels, conferences, association meetings and leadership retreats

Project Position: Trainer/Focus Group Facilitator



Gina Helfrich, Ph.D.

Austin, TX | 512-766-4462 | gina.helfrich@gmail.com | ginahelfrich.com

Relevant Experience

NumFOCUS

Austin, TX

Communications Director and

FEB 2017 – PRESENT

Program Manager for Diversity & Inclusion

Communications Director

JULY 2015 – APRIL 2016

- Hired as employee #2 to build out **strategy for all internal communications and external community engagement** efforts.
- **Create and deliver brand strategy for global audience**, growing @NumFOCUS from 500 followers at start-date to 11K today & @PyData from 6K followers at start-date to 32K today.
- **Scale community investment** from 71 donors, 3 sustainers, 122 gifts totaling \$193K at start-date (2012-2015) to 842 donors, 178 sustainers, 2298 gifts totaling \$570K today (2015-2018).
- **Formalize and execute diversity & inclusion program**, managing international volunteers to deliver key program objectives and propagate best practices throughout the community.
- **Lead development of best practices kit for diverse and inclusive events**, including distribution plan and strategy for keeping recommendations up-to-date.

Independent Consultant

JUNE 2015 – PRESENT

- Deliver strategic learning and development support for fast-growing enterprise technology clients needing to **scale employee engagement and company culture around diversity and inclusion**.
- **Provide insight into key opportunities to evaluate and update HR and People processes** to promote unbiased assessment, greater sense of employee belonging, and balanced teams.
- **Generate excitement for positive culture change**: clients regularly report increased engagement and faster pace of change on diversity & inclusion initiatives after my workshops, from CEO on down.
- **Offer expert advice and insight on unconscious bias**, including employee, manager, and C-Suite workshops.

recruithr

Austin, TX

Co-Founder, VP of Marketing & Operations

JULY 2015 – JULY 2016

- **Won 11 client contracts in 6 months**, including Pinterest, GitHub, Pandora, and Electronic Arts.
- **Crafted messaging to successfully gain traction with candidates** and secure VC investment.
- Trained and supervised 2 full-time employees, including one remote worker.
- Identified key partners and messaging strategies to **drive a diverse talent pipeline for clients**.

Harvard University, Harvard College Women's Center

Cambridge, MA

Director

JULY 2011 – FEB 2014

Assistant Director

JAN 2010 – JUNE 2011

- Developed and led **campus-wide culture change programs** to improve gender equity and women's leadership.
- Managed \$130,000 budget; trained and supervised 12 direct reports.
- Served on Harvard Faculty of Arts & Sciences Diversity Committee with Prof. Mahzarin Banaji, **leading researcher on unconscious bias**.
- Partnered with over 20 offices and 30 student organizations to produce over 40 programs and events per year.
- **Assessed campus climate survey results to identify actionable insights**; created programs and advised senior leadership in response to identified needs.

Education

Ph.D. in Philosophy, Graduate Certificate in Women's Studies

B.A. in Philosophy

Project Management Professional, License 1829020

Emory University, Atlanta, GA

Boston College, Chestnut Hill, MA

Project Management Institute

Project Position: Facilitator/Trainer/Organizational Development



Dr. Stephany Powell, Ed.D. PCC and Associates

PROFESSIONAL PROFILE

As a member of the Los Angeles Police Department for thirty years retiring as a Sergeant II, Dr. Powell has extensive experience in the areas of criminal investigations, case filing, the disciplinary system, administrative procedures, budgetary oversight, along with the attainment of knowledge in the legal aspect of policing. Prior to becoming a Police Officer, she was a school teacher for the Los Angeles Unified School District for four years. She has instructed a variety of classes that range from leadership courses to law enforcement executives, train the trainer, constitutional law, cultural diversity, and racial profiling. She is a subject matter expert in the areas of uses of force and vehicle pursuits. She earned her Ed.D in organizational leadership and her MA in Behavioral Sciences, Conflict Resolution.

Contact Information

Positive Change Consultants and Associates (PCC and Associates)
29427 106 th Street East
Juniper Hills, California 93543
818.554.0072
Ebonyfarm@aol.com

Relevant Experience:

- Adjunct Professor specializing in organizational leadership theory and practice, group dynamics, conflict resolution, and cultural diversity in the business graduate program of the University of LaVerne and Sociology at Los Angeles Trade Technical College. She instructs courses in the management of diversity, managing groups and teams, management theories and practices, culture and gender issues in management, and leadership in organizations.
- Instructor for the Los Angeles Police and Los Angeles Fire Department Leadership Programs, a multi-disciplined, 1-year course designed to prepare current and future leaders.

Education, Training and Certifications:

- Doctor of Education in Organizational Leadership, University of La Verne
Dissertation Topic: The Effects of Work Related Emotional Dissonance on African American Female Officers When Cultural Identity is Threatened.
- Masters of Arts in Behavioral Science, Conflict Resolution, California State University Dominguez Hills I
- Bachelor of Arts in Sociology, San Jose State University
- University of Southern California, School of Education, Teaching Credential Program
- City of Los Angeles Office of the City Attorney Dispute Resolution Training
- Los Angeles Police Department (LAPD) West Point Leadership Program Certificate

CORE COMPETENCIES

- Training Development and Delivery
- Public Speaking
- Organizational Development
- Diversity and Inclusion
- Team Building and Coaching

TECHNICAL PROFICIENCY

Tools: MS Office Suite

RELEVANT EXPERIENCE

Chief Executive Officer January 2012 – Present
PCC and Associates

As an independent contractor and Chief Executive Officer for PCC and Associates, Dr. Powell is responsible for conducting research and workshops in the areas of organizational leadership, cultural diversity, conflict resolution, group dynamics, and positive change techniques within organizations. She conducts assessments of the current climate of organizations and makes recommendations for policy and procedural changes. She provides executive coaching and recommends best practices for organizations to incorporate into their existing business models.

Adjunct Professor January 2010 - Present
University of LaVerne

Dr. Powell specializes in organizational leadership theory and practice, group dynamics, conflict resolution, and cultural diversity in the Business graduate program. She instructs courses in the management of diversity, managing groups and teams, management theories and practices, culture and gender issues in management, and leadership in organizations.

**Executive Director
Mary Magdalene Project**

October 2013 – Present

Dr. Powell is responsible for programmatic and administrative decisions as well as the overall management of the organization. Dr. Powell leads the fight for the freedom and survival of women and girls in Los Angeles whose lives have been destroyed by commercial sexual exploitation. She works with local, state, and federal organizations to provide a multi-faceted support system for those who make the difficult journey out of an existence of abuse and violence. Dr. Powell oversees the conduct of programs and services that include a drop-in-center, diversion, and street outreach programs, education prevention programs for youths, crisis intervention and emergency support services, and survivor mentorship for girls and women, helping victims of commercial sexual exploitation overcome their fears and empower them to leave a life of abuse and violence to reach their true potential and accomplish their goals.

**Police Sergeant II
Los Angeles Police Department**

September 1983 – October 2013

As a Police Sergeant II, Dr. Powell was the Officer-In-Charge of the Los Angeles Police Department (LAPD) Vice Unit. She supervised police officers and detectives investigating prostitution and human trafficking. She provided training to the officers in the unit. She worked closely with the City and District Attorneys in developing filing policies and enforcement postures. Dr. Powell ensured the officers were operating within the law and conducted investigations into complaints of possible officer misconduct. She worked with local, state, and federal law enforcement agencies to address this problem. Dr. Powell was also assigned to the LAPD Internal Affairs Investigation Unit where she internal investigations into officer misconduct including allegations of criminal activity. She was the Executive Officer for the Chief of Police and also served as a Public Information Officer (PIO) and was the Officer-In-Charge of Training.

MISCELLANEOUS

- Los Angeles District Attorney Jackie Lacey Award 2015 for the Victim Witness Assistance Program
- “Women of Year” for California Assembly, 39th District
- Mayoral appointee to the Los Angeles Area Planning Commission
- Member of the City of Los Angeles Certified Mediator Panel
- Staff Writer for Executive Officer, Los Angeles Police Department
- Member of the Jack and Jill of America, Past Chapter President
- Member of the Alpha Kappa Alpha Sorority Inc. Past Chapter Vice President
- Member of the Links Incorporated, Current Chapter President

Project Position: HR Liaison/Organizational Assessment/Trainer



PAULA SPEARS MBA, SHRM-SCP

Santa Ana, California 508-517-2363

pecspears@gmail.com www.linkedin.com/in/paulaspearshrreexecutive

HUMAN RESOURCE EXECUTIVE

**Culture & Change Ambassador / Organizational Development / Talent Management Authority /
Global HR Strategic Planning / Organizational Development / Leadership Development /
Executive Coaching / Diversity / Mergers & Acquisitions / HR Analytics / Sales Enablement**

Strategic and innovative HR Executive with cross-industry expertise from high growth tech start-ups to complex and highly matrixed corporate environments. A resilient business leader who thrives during times of uncertainty, preserving culture & employee engagement while maintaining laser-focus on business performance and profitability. A trusted advisor and coach with an appreciation for every business's greatest asset...

Human Capital.

PROFESSIONAL EXPERIENCE

CYLANCE | Irvine, CA | Cybersecurity start-up; acquired by Blackberry February 2019

Senior Director - Global Talent Management & Development | Jan 2017 – Feb 2019

- **Global Talent Management**

- Optimized efficiency & speed of technical & sales recruiting teams reducing days to fill by 28% & highlighting candidate pool selection accuracy
- Re-engineered recruiting process 2018, resulting in successfully hiring 293 employees Improved candidate, manager & recruiter experience by humanizing the Cylance brand & cultivating “employer of choice” mindset
- Created sales onboarding playbooks establishing 30-60-90 day “steps to success”

- **Employee Development**

- Orchestrated company-wide employee development programs creating a learning culture & achieving 69% employee utilization
- Introduced blending learning leadership workshops tied to coaching & mentoring Implemented Cylance Management Essentials curriculum & certification program
- Delivered personality assessments, 360 feedback & sales enablement workshops

Key Accomplishment

Austin Facility Ramp-up: Delivered recruiting solutions in four months for 75 hard-to-fill technical & consumer products sales roles in highly competitive Austin, TX area

Performance Management: Streamlined performance management process enhancing manager buy-in & employee engagement via periodic “check-ins” traditional performance reviews & workday technology

PHILIPS HEALTHCARE | Andover, MA | Medical Equipment & Patient Care

Senior Director - Human Resources Business Partner | May 2014 – Dec 2016

- **Human Resources Business Partner & Sales Enablement Director**

- Trusted advisor to key stakeholders in alignment & execution of HR strategies enriching market penetration in period of demanding organizational & cultural transformation
- Introduced OD strategies enabling business go-to-market initiatives driving productivity & differentiation in growing medical equipment industry
- Launched sales enablement programs providing structured sales “competencies for success” & development roadmaps
- Directed remote HR team of HR Generalists, HR Technical Specialist & HR coordinators

P Spears

EMC CORPORATION | Hopkinton, MA | Data Storage, Security merged with Dell

Director - Human Resources | Jul 2005 – Apr 2014

• **Global Human Resources Business Partner**

- Trusted partner and served leadership team with client base of 1800 employees worldwide reporting to President, Global Tech Support
- Directed recruitment, selection & hiring process for critical leadership talent in California, Ireland & Shanghai
- Reviewed, coordinated and answerable for timely submission of annual merit and equity planning
- Maintained collaborative relationships with COE HR Business Partners in Ireland, India, Shanghai, Sydney & Canada

• **Employee Management | Leadership Development**

- Lead global HR team of HR Business Partners, HR Generalists, HR Coordinators & 30 Leadership Development Associates
- Developed staff utilizing performance management, leadership coaching, counseling & disciplinary guidance
- Global Services Leadership Development Program received 'Best Leadership Development Program' Award in Ireland

Hitachi Data Systems | Santa Clara CA | Data Storage, Software, Services

Director - Americas Human Resources 1998 - 2005

Manager - Human Resources 1996-1998

- HR Business Partner servicing Engineering, Finance, Global Logistics & Supply Chain leadership teams
- Designed & implemented annual sales incentive plans, bonus plan strategies & governance.
- Travelled to Hitachi Ltd. in Japan on leadership development initiative
- Chosen as member of leadership team responsible for scouting location & vendor selection for new distribution center in Indianapolis
- Collaborated on consolidation of existing distribution centers in California & Maryland
- Conducted reduction in workforce in both locations while staffing new distribution center & offered relocation packages to critical talent

EDUCATION

University of Phoenix San Jose, CA

Master of Business Administration

University of Phoenix San Jose, CA

Bachelor of Science - Business Management

Loyola Marymount University Los Angeles, CA

Mechanical Engineering - core engineering: 108 Credits

ASSOCIATIONS

National Human Resources Association (NHRA) – Orange County, CA

CERTIFICATIONS

Society of Human Resources Management: Senior Certified Professional (SHRM-SCP)

Organizational Development Certificate: Practitioner

INDUSTRY EXPERIENCE

Technology – Cylance, EMC, Hitachi

Healthcare – Philips, Pharmavite, United Healthcare, Baxter Pharmaseal

Non-Profit – J. Paul Getty Trust

Project Position: Facilitator/Trainer



Sergeant Bernard C. Fitchpatrick, MA (RET)
870 Bull Run, Canon City, Colorado 81212
661.313.0676
bcfitchp@aol.com

Objective

To outline my experience and qualifications as a consultant to provide law enforcement, leadership, and organizational policy development and training.

Profile

- Over 30 years of professional law enforcement and public safety experience.
- Ability to correlate real world law enforcement experience into an academic, managerial and social environment.
 - Goal-oriented individual with strong leadership and teaching capabilities.
 - Organized, highly motivated, and detail-directed problem solver.
 - Proven ability to work with a variety of professional organizations and the community to accomplish shared goals.
 - Adult learning theory and train-the-trainer expertise.

Education

M.P.A., Public Administration, University of Southern California
B.S., Criminal Justice, California State University Long Beach
A.A., Administration of Justice, El Camino Community College
Instructor Development Course, Los Angeles Police Department

Relevant Experience & Accomplishments

Teaching Experience

- Instructor for the University of Phoenix, Criminal Justice Program with concentration on Police Ethics, Theory and Practices, Procedural Justice, Organizational Behavior and Management, and Interpersonal Communications – Southern California Campus, 2012 – Present
- Adjunct instructor for ITT Technical Institute, Criminal Justice Program, Diversity in Law Enforcement – Sylmar, California Campus, 2009 – 2011
- At the Los Angeles Police Academy, provided systematic instruction to Los Angeles Police Department personnel and recruits in officer safety and tactical law enforcement field operations.
- Drug Abuse Resistance Education (D.A.R.E.) Certified International instructor providing guidance and training to less tenured instructors and U.S. military personnel while assessing individual agency's programs and making recommendations to ensure courses were in compliance with established standards.

Management/Supervision

- Assistant Watch Commander responsible for maintaining adequate field deployment of resources while monitoring personnel to ensure compliance with departmental policies, procedures, laws, and the federal consent decree.
 - Adjutant to the Patrol Commanding Officer responsible for coordinating the completion of critical projects in support of the Patrol Operations and department mission.
 - Supervised police personnel performing law enforcement and community services in field operations.
-

Employment	On Scene Emergency Management Solutions	<i>2018</i>
	<ul style="list-style-type: none"> Contract instructor for 	
	University of Phoenix, College of Security and Criminal Justice, Southern California Campus	<i>2012 – 2016</i>
	<ul style="list-style-type: none"> Instructor for the University of Phoenix, College of Security and Criminal Justice with concentration on Police Ethics, Procedural Justice, Theory and Practices, Organizational Behavior and Management, Interpersonal Communications 	
	ITT Technical Institute, Criminal Justice Program, Diversity in Law Enforcement, Sylmar, California Campus	<i>2009 – 2011</i>
	<ul style="list-style-type: none"> Adjunct instructor for ITT Technical Institute, Criminal Justice Program, Diversity in Law Enforcement – Sylmar, California Campus, 2009 – 2011 	
	Los Angeles Police Department, Sergeant II, City of Los Angeles	
	<ul style="list-style-type: none"> Provide supervision, guidance, training, and functional oversight of officers and others deployed within a geographical district. Liaison with elected officials, community members and law enforcement while analyzing crime data to develop strategies to deploy resources to address systemic issues affecting the quality of life within a given community. Entry Level Interview Board. Evaluate police officer applicants for the City of Los Angeles. 	<i>2008 – 2014</i>
	Los Angeles Police Department, Field Sergeant, City of Los Angeles	<i>2002-2008</i>
	<ul style="list-style-type: none"> Provided supervision and guidance to police officers and others in a field setting. Liaison with elected officials, community members and law enforcement to develop strategies to address systemic issues affecting the quality of life within a given community. 	
	Los Angeles Police Department, Police Officer III, City of Los Angeles	<i>1989-2002</i>
	<ul style="list-style-type: none"> Trained and closely evaluated probationary police officers as they become acclimated to the law enforcement profession in the field. Trained and audited law enforcement, military and other personnel in the D.A.R.E. program internationally. Conducted vice operations to enforce Alcohol Beverage Control laws, reduce/eliminate prostitution, bookmaking and other nuisance criminal activity. 	
Honors & Awards	Los Angeles Police Department, Supervisor of the Quarter. Regional Occupation Program, Evaluation Board Member.	
Personal	Married with 3 children and one granddaughter. My father is a World War II Pearl Harbor survivor and my wife is a retired Los Angeles Airport Police Captain.	

Project Position: Facilitator/Trainer



LaTonya Pegues
Boaz Enterprises, Austin TX
DBE
infor@boazent.com

Background

LaTonya Pegues is the founder of BOAZ Enterprises. LaTonya is a diversity and inclusion expert, executive coach, facilitator and public speaker. She is a graduate of Howard University and is a member of the Johnson Space Center Small Business Council, Greater Austin Chamber of Commerce Communications Council and Diversity Task Force, Texas Association of African-American Chambers of Commerce Professional Services Committee and Small Business Advocate at the Texas State Capitol. She relocated to Austin in June of 2010, where she has immersed herself in the City of Austin diversity and inclusion initiatives. She is a certified Disadvantaged Business with the City of Austin.

Experience

LaTonya is an expert facilitator with a concentration on conversations regarding diversity,

- Inclusion and fairness, stakeholder engagement, and having difficult conversations.
- Executive Coaching
- Leadership Training
- Diversity, Inclusion & Fairness
- Emotional Intelligence
- Conflict Management
- Facilitation
- Professional Development
- Workshop Training
- Train the Trainer
- Co-Worker Interpersonal Skills Development
- Media Training
- Team Building
- Inter Personnel Training
- Morale Boosting
- Youth Training
- Kids Education

LaTonya has provided these services to the Austin Independent School District, State Farm Insurance, and the Bureau of Fire. She has spoken at Universities across the nation.



Part VII. Local Business Presence



Fundamental Advisory
106 E. Sixth Street, Suite 900
Austin, TX 78701
Phone: 512-409-5027
Local Business Presence
Website: www.fundamentaladvisory.com

Contact: Mindy Gulati, JD
Email: mindy@fundamentaladvisory.com

Part VIII. Service-Disabled Veteran Business Enterprise (SDVBE)

Project Leader Skip Pettit is a Service Disabled Veteran.

ITCI is a VA-verified SDVOSB 2019-2022

Part IX.

Does Not Exist in the RFP—INTENTIONALLY LEFT BLANK

X. Proposal Acceptance Period

This proposal is valid for a period of one hundred and twenty (120) calendar days subsequent to the RFP closing date.

XI. Proprietary Information - None

Part XII. Authorized Negotiator



Mr. Charles "Skip" Pettit
International Training Consortium, Inc.
23749 Rolling Fork Way
Gaithersburg, MD 20882
Phone: 301-428-0670/Cell: 301-928-5103
FAX: 301-972-3906
Email: skip@international-training.com
SDVOSB VA-Verified VCE/VETS
DUNS: 88-4653403/CAGE Code: 080Q0

and



Mindy Gulati, JD
Fundamental Advisory
106 E. Sixth Street, Suite 900
Austin, TX 78701
Phone: 512-409-5027
Email: mindy@fundamentaladvisory.com
Local Business Presence

Part XIII. Cost Proposal

Financial Proposal ITC -City of Austin Citywide Implicit Bias Training						
Description of Services	Number of Hours		Rate		Cost	Cost/Overhead/Profit
Initial Assessment / Including Overview Assessment of development materials	250		\$ 296.88	=	\$74,220.00	\$96,486.00
Design Training to Executive and Manager Populations	360		\$125.00	=	\$45,000.00	\$58,500.00
Deliver Training Executive and Manager Populations 50 classes Max 20 per class and 2 Facilitators	1,200		\$255.00	=	\$306,000.00	\$397,800.00
Post Training Assessments of both trial and regular training	60		\$260.83	=	\$15,649.80	\$20,344.74
Design Individual Contributor and Train the Trainer courses	175		\$125.00	=	\$21,875.00	\$28,437.50
Deliver Training for Train the Trainer 8 Classes 15 per Class 2 Facilitators	384		\$225.00	=	\$86,400.00	\$112,320.00
Post Training Assessment of Train-the-Trainer classes with HR	80		\$229.00	=	\$18,320.00	\$23,816.00
Update design for supervisors and individual contributors	50		\$125.00	=	\$6,250.00	\$8,125.00
Review and updated design of supervisors and individual contributors course assess with HR	16		\$246.88	=	\$3,950.08	\$5,135.10
Plan rollout of the material/training for CLPs to present to City employees with HR	40		\$260.83	=	\$10,433.20	\$13,563.16
Monitor Each CLP a minimum of 10% of presentations (40 participants per class with 2 CLP Instructors)	156		\$150.00		\$23,400.00	\$30,420.00
Design 1-hour facilitated conversation tool for supervisors	30		\$125.00	=	\$3,750.00	\$4,875.00
Design Continual Assessment Tool	40		\$229.00	=	\$9,160.00	\$11,908.00
Glossary of Terms	8		\$125.00	=	\$1,000.00	\$1,300.00
Available for curriculum adjustments during initial rollout up to 15 months after launch/8 hours per month	120		\$150.00		\$18,000.00	\$23,400.00
Closeout of contract to include final reports/ Including Final Presentation	60		\$256.67	=	\$15,400.20	\$20,020.26
				=	\$0.00	\$0.00
				=	\$0.00	\$0.00
				=	\$0.00	\$0.00
				=	\$0.00	\$0.00
				=	\$0.00	\$0.00
	3,029	x		=	\$0.00	\$0.00
Total Bidder Cost/ total Cost plus Cost/Overhead/Profit					\$658,808.28	\$856,450.76
Materials/Workbooks, Travel and Misc.						\$75,000.00
					Total Price	\$931,450.76

Financial Proposal ITC -City of Austin Citywide Implicit Bias Training				
Consultant Roles and Rates				
Consultant	Role	Hourly Rate	Estimated % of Work	
Charles Petitt, M.Ed.	Program Manager	300.00	0.08	
Mindy Gulati, J.D.	Project Lead	300.00	0.16	
Eric Collier, CNTC	Sr. Consultant	275.00	0.03	
LaPonda Fitchpatrick, SHRM-SCP	Sr. Consultant	225.00	0.11	
Lester Hoffman, Ph.D.	Sr. Consultant/ISD/Eval	200.00	0.08	
Teresita Saff, M.Ed., MA	Sr. Facilitator	200.00	0.07	
Marc De Simone, Sr., Ph.D.	Sr. Consultant	200.00	0.05	
Joan De Simone, Ph.D,	Sr. Facilitator	200.00	0.05	
Denisha Jenkins, MA	Facilitator	185.00	0.04	
Patricia M. Porter, MS	Analyst	185.00	0.04	
Rachel Rosen, MA	Sr. Consultant/Analyst	185.00	0.05	
Bernard Fitchpatrick, MA	Facilitator	185.00	0.05	
Gina Helfrich, Ph.D.	Sr. Consultant	300.00	0.05	
Stephany Powell, Ed.D.	Sr. Consultant	300.00	0.04	
Paula Spears, MBA	Analyst	185.00	0.04	
LaTonya Pegues	Consultant	165.00	0.02	
Rebecca Sears	Administration	85.00	0.04	

100%

NOTE: Hourly costs for ITCI Team Members are based on the maximum rate that MAY be applied to work performed and may not represent actual rate per assignment. Pricing for each task is based on a blended rate.

International-Training Consortium, Inc				
Signature:				
11-Jun-19				
23749 Rolling Fork Way Gaithersburg MD 20882				
Offeror FEIN: 52-1891443				



ADDENDUM

Sample Organizational Assessment Questions (Yes/No)

PLEASE ANSWER **YES** OR **NO** TO THE FOLLOWING QUESTIONS:

1. Has the City of Austin done focus groups and surveys within the past three years in your community to measure the public's perception of your City government's reputation in terms of diversity, inclusion, accessibility and cultural sensitivity?
2. Do the employees of the City of Austin who work directly in the community reflect the diversity of the community and your organization?
3. Are your public communications, community reports, advertisements, information and educational materials, websites, and other communication media accessible to and reflective of the diverse community you serve?
4. Do your recruitment efforts include strategies to reach out to diverse candidates, including gender, racial, ethnic, religious, disability status, sexual orientation, gender identity, veteran status, and socio-economic diversity?
5. Does the City of Austin partner with local educational institutions and community organizations to develop and support career pathways for underrepresented individuals?
6. Does your workforce recruitment team reflect the diversity you need in your organization?
7. Do you acknowledge and honor diversity in your employee communications, awards programs, and other internal celebrations?
8. Does your Human Resources Department have a system in place to measure your diversity pipeline progress (i.e., recruitment, retention, promotion) and report it to City leadership and employees?
9. Does your organization have a mentoring program in place to help develop your best talent, regardless of gender, racial, ethnic, language, religion, disability status, sexual orientation, gender identity, veteran status and socioeconomic status?
10. Does the City of Austin provide language services, including identifying qualified individuals inside and outside your organization, who can help City staff communicate with constituents and others from a wide variety of nationalities and ethnic backgrounds?

Sample Diversity and Inclusion Employee Survey (Likert Scale)

This is a quick online survey to find out the level of understanding and implementation of diversity and inclusion in your workplace. It is being completed by hundreds of your co-workers. There are no right or wrong answers, so please respond as honestly as you can. It is confidential and no one will be identified individually. Your responses will be considered only as a part of the larger group of employees. After the survey results have been tabulated, these results will be used to make essential changes that will position your organization to truly embrace diversity and inclusion in your workplace to reduce bias, attract, hire, manage, and retain talented and diverse employees to increase innovation and creativity. **YOUR CANDID RESPONSE IS CRUCIAL TO ENSURE AN ACCURATE AND MEANINGFUL EVALUATION OF YOUR WORKPLACE AS IT EXISTS TODAY IS CONDUCTED.**

For the purposes of this survey, a **lower status group** refers to the extent to which members of a group are less respected and/or admired by others in comparison to another group(s). This could be based on gender, race, ethnicity, religions, sexual orientation, disability, etc.

Thank you in advance for your cooperation and helping the City of Austin create a workplace environment that is equitable for all.

PLEASE CIRCLE YOUR RESPONSE TO EACH OF THE FOLLOWING STATEMENTS:

	Strongly Disagree			Strongly Agree		
1. In my work group everyone's opinion is valued and considered.	1	2	3	4	5	
2. In my work group people are judged on how well they perform.	1	2	3	4	5	
3. I feel free to tell my supervisors what I really think about my work environment.	1	2	3	4	5	
4. People with different sexual orientations are acknowledged and accepted within my work environment.	1	2	3	4	5	
5. Women and men are promoted with equal frequency.	1	2	3	4	5	
6. I believe my difference is held against me.	1	2	3	4	5	
7. My workplace is an inclusive environment for women.	1	2	3	4	5	
8. I consider my supervisor to be a mentor.	1	2	3	4	5	
9. Affirmative action and equal employment opportunity programs promote reverse discrimination against white males.	1	2	3	4	5	
10. Race, gender, and ethnicity have no effect on how I interact with the general public or my peers.	1	2	3	4	5	
11. Do you see any evidence that lower status groups are interrupted more, talked over more, given fewer chances to speak up in meetings?	1	2	3	4	5	

Comments: (Please provide any information you believe is important so that an accurate assessment of your work environment can be conducted.)

Sample Implicit Bias Slides



Biased, Not Me?

Implicit bias lies within all of us. It is very common and even those who strive to have commitments to openness and a nonjudgmental mindset, often harbor as many as anyone else.

And that's okay.

www.fundamentaladvisory.com



Anti-Bias Strategy #1: Education

- **Awareness**
- **Mindfulness**
- ***Training In Implicit Bias Reduces its frequency***

- ▶ --Take Implicit Association Test (IAT) and think about the results
- ▶ --Be aware and remain mindful that intuition and implicit responses are valuable, but some decisions require more explicit types of thinking. *a stare not a blink.*

James W. Browning, PhD
Former Chair, Department of Strategic Leadership and Faculty
The Eisenhower School
National Defense University
NDU/Room 236LIB
Washington, DC 20319
Office: 202-320-2600; Email: browningj@ndu.edu

June 20, 2016

NAIMA YELDA
Contract Specialist
NAVSUP Fleet Logistics Center San Diego (FLCSD) Regional Contracts
Department, Code 230
3985 Cummings Road, Bldg. 116, 3rd Floor
San Diego, CA 92136-4200

Dear Ms. Yelda,

The purpose of this letter is to strongly recommend International Training Consortium, Inc. (ITC) and its President, Charles "Skip" Pettit, for the *Strategic Communication Training* program (solicitation N00244-16-R-0008). I have personally contracted for and closely observed ITC's superb training programs led by Mr. Pettit. A person of high character and strong ethical decision making, Mr. Pettit epitomizes the qualities and attributes of a superb provider of meaningful, results-oriented training. Furthermore, I have observed members of his extraordinarily gifted Strategic Communication team of scholars, practitioners, and trainers who have not only led strategic communications at the highest levels for the U.S. Government and the Department of Defense, but also have taught naval officers from commander to the vice admiral levels.

Based on my extensive background and expertise, I'm in a unique position to evaluate the strength and expected acclaimed results in ITC's and its exceptional strategic communications team. For example, I have a strong academic and professional background in leadership and management. I was the former Director of the Navy's worldwide leader development programs; CEO of a leadership and management training and education firm; conceived and served as the chief of the Library of Congress's corporate university; recently served as chairman of the Department of Strategic Leadership for the prestigious Eisenhower School; and author of the 2013 published senior leadership textbook, *Leading at the Strategic Level* (currently in use by National Defense University, the Air War College, and the UAE Defense College). In each of these positions I developed training RFPs and served as COR in evaluating contractor submittals. Consequently, I have a keen understanding and appreciation for what constitutes effective training and learning programs and activities. With my background and experience in mind, I believe I can professionally observe and comment on individual and organizational training programs and it is my firm conviction ITC and the team of strategic communication professionals will provide a truly exceptional training program for the Navy.

In regards to Mr. Pettit's world-renown leaders and trainers that will serve on the Strategic Communications training team, I offer the following insights:

- John Matheny. Based on guidance from Admiral Mullen (CJCS) and my discussions with Dr. Richard Danzig (former Secretary of the Navy), General Michael Hayden, USA (former Director of the CIA and NSA), General Chuck Krulak, USMC (former USMC Commandant); and General Richard Myers, USAF (former CJCS) it was clear we needed to develop lessons at NDU focused on strategic communications. We were fortunate to have John Matheny, DOD's strategic communication expert, be assigned as Defense Secretary Bob Gates's representative to NDU/The Eisenhower School. His superb knowledge and expertise assisted my efforts to build an effective program and lessons in strategic communications. Furthermore, because of his special expertise, I asked him to be a major contributor to my chapter addressing strategic communications in my textbook, *Leading at the Strategic Level*.
- James Q. Roberts. Mr. Roberts has extensive experience and expertise in strategic communications teaching and training flag and general officers (as well as O-5s/O-6s) in the Navy and other services. For example, in addition to his teaching and training expertise, he was responsible for campaign design, approval, implementation and assessment; internal communications to the organization—leader credibility and authenticity, change management, cultural challenges within Services and in Joint Arena; External Communications to National Stakeholders—other USG, Congress, U.S. Public; External Communications to International Stakeholders—International Community, NATO, EU, other allies and partners; and External Communications to Neutral and Malign Competitors—Military Information Support Operations and Information Operations campaign design, approval, and implementation to influence, persuade, and/or combat malign messaging.
- James P. Farwell. Mr. Farwell is internationally recognized as a foremost authority and expert in strategic communications and legal and policy issues related to cyber war and cyber security. He has advised and conducted education and training at the U.S. Department of Defense, the U.S. Special Operations Command, U.S. Central Command and the U.S. Strategic Command. In strategic communication, he is the author or coauthor of four of the leading books on strategic communication and information warfare, including one used by the Joint Special Operations University, where he is Adjunct Faculty, as part of its teaching curriculum.
- Darby Jo Arakelian. Ms. Arakelian is an expert in strategic communications, especially in media quantitative content analysis, and cyber-attacks. She developed multiple training programs related to strategic communications, the media, and usage and consumption patterns for the U.S. Defense and Intelligence sectors. She is an expert in terrorism and counterterrorism communications strategy and analysis, cyber warfare, and automated media monitoring and analysis. Additionally, she is a published author in such esteem journals as the *Strategic Studies Quarterly* and *The National Interest*.
- Amy Zalman, PhD. Dr. Zalman, Professor of Strategic Foresight Methods at Georgetown University and member of the Board of Visitors for Air University, served as CEO and President of the World Future Society and from 2012-2014 served as the inaugural Department of Defense Chair of Information Integration and professor of security strategy at the National War College. An adroit trainer and educator, she is an expert on the critical roles of strategic communication and the effects of culture. Amy received high marks from her students as well as peers, and her influence on the curriculum continues to this day.

- Mike Dabadie. Mr. Dabadie is president and managing partner of Hearts & Minds Strategies, a market research firm with special expertise in communication issues and metrics; e.g., message architecture; audience segmentation; targeting and prioritization; strategy; concept testing; content versioning to address national, regional and local differences; and how to optimize the communications funnel from acquisition to experience to retention, and across platforms. He is the recipient of two David Ogilvy Awards.
- Paul Huxhold. Mr. Huxhold led the Strategic Engagement Division, U.S. Special Operations Command in Tampa, FL. He's an expert in brokering win-win engagements with academic, business, think tanks, and cultural experts. An expert trainer and educator in communications at the University of Central Florida and the Institute for Simulation and Training.
- Jack Guy. Mr. Guy is one of the top operational experts in strategic communication for the military and as such is considered one of the preeminent faculty and trainers at the Joint Special Operations University.

Clearly, Skip Pettit has formed a superb team of truly exceptional leaders with strong and diverse proven records in not only effectively teaching senior military and civilian leaders in strategic communications (all services including the US Navy), but also in developing and executing successful strategic programs and activities at the highest level in the U.S. Government and in National Defense. The collective synergy of this magnificent group of strategic communication experts and professionals—in all phases from policy to execution—guarantees confidence that the U.S. Navy will receive topflight, unequalled strategic communication training.

I could not recommend any strategic communications training more highly and unreservedly than I recommend ITC and its world-renown strategic communications training team.

I will gladly furnish additional information, and can be reached at my office (202) 320-2600 and by email: browningj@ndu.edu.

Sincerely,

James W. Browning

James W. Browning, Ph.D.
Professor of Behavioral Science
Former Chair and Faculty
Department of Strategic Leadership
National Defense University/ES



SAMSUNG AUSTIN SEMICONDUCTOR

12100 Samsung Boulevard

Austin, Texas 78754

TEL: (512) 672-1000

To Whom It May Concern:

I am absolutely pleased with the presentation given by Mindy Gulati of Fundamental Advisory to the Women in Technology at Samsung (WITS) group.

On May 16th of this year, Mindy came to our company campus to speak to our members-at-large regarding the topic of Implicit Bias. She shared her personal story and provided us the opportunity to expand our understanding of this delicate subject.

This presentation was well received by our members and has created effective dialogue. We have had an overwhelmingly large response from our members with positive feedback in regards to their satisfaction of her presentation and their desire to learn more. Her open attitude made the topic relatable and informative, keeping the audience engaged throughout the hour-long material. She was even kind enough to stay afterwards to engage in one-on-one discussion and answer personal, highly emotional questions.

Her message allows for personal reflection and challenges the members of our group to continue to move forward to press for progress.

I look forward to working with Mindy Gulati again in the future and would gladly be of reference if the need should ever arise.

Sincerely,

A handwritten signature in black ink, appearing to read "C. Smith-Winters", written over a horizontal line.

Charmaine Smith-Winters
Senior Director, Human Resources



11/2/2017

I am the Sr. Manager of Inclusion & Diversity at PayPal and have had the pleasure of seeing Mindy in action as a public speaker, educator, and thought leader. Whatever her audience, she moves them towards progress. She is effective in her methodologies and is passionate about helping businesses become leaders in Inclusion and Diversity. I have been most impressed with Mindy's ability to connect with her audience and make attendees feel comfortable.

PayPal hired Fundamental Advisory for Mindy Gulati to present to a group of approximately 100 employees at PayPal's Culture Week. This presentation was geared towards exploring avenues where knowledge is obtained on various topics and how that can shape bias and assumptions. Mindy delivered and the interaction between her and the group was great.

PayPal hopes to partner with Fundamental Advisory and Mindy Gulati in the future and recommends working with Fundamental Advisory for your Implicit Bias or Diversity & Inclusion program implementation needs. Feel free to call me at 512-297-6397 or email me muna@paypal.com.

A handwritten signature in black ink, appearing to read 'Muna Hussaini'.

Muna Hussaini
Sr. Manager Inclusion & Diversity
PayPal

EXHIBIT 1

RFP# 5800 RJZ3005

IMPLICIT BIAS AND CULTURAL COMPETENCY TRAINING AND DEVELOPMENT REVISED BEST AND FINAL

City of Austin
Purchasing Office
P.O. Box 1088
Austin, 78767-8845

October 28, 2019

International Training Consortium, Inc.

23749 Rolling Fork Way

Gaithersburg, MD 20882

Phone: 301-428-0670/Cell: 301-928-5103

FAX: 301-972-3906

Email: skip@international-training.com

SDVOSB VA-Verified VCE/VETS

DUNS: 88-4653403/CAGE Code: 080Q0

INTERNATIONAL TRAINING CONSORTIUM, INC.

October 28, 2019

Ricardo Zavala, CTCM, MPA
Procurement Specialist III
City of Austin Purchasing Office

RE: Implicit Bias and Cultural Competency Training and Development Request for Proposal #5800 RJZ3005 – Revised Best and Final Offer (BAFO)

Dear Mr. Zavala:

International Training Consortium, Incorporated, (ITCI) is pleased to submit our Revised Best and Final Offers (BAFO) to the Implicit Bias and Cultural Competency Training and Development (Implicit Bias) Request for Proposal #5800 RJZ3005.

If you require any further clarification as you continue your evaluation process, please do not hesitate to contact us. We look forward to working with the City of Austin.

Thank you,

A handwritten signature in black ink, reading "Charles Pettit". The signature is written in a cursive, flowing style.

Charles "Skip" Pettit
President, ITC, Inc.
SDVOSB



CITY OF AUSTIN, TEXAS
Purchasing Office
REQUEST FOR PROPOSAL (RFP)
OFFER SHEET

SOLICITATION NO: RFP 5800 RJZ3005

DATE ISSUED: April 29, 2019

COMMODITY/SERVICE DESCRIPTION: Citywide Training For Implicit Bias.

REQUISITION NO.: RQM 5800 19041200453

COMMODITY CODE: 91838

PRE-PROPOSAL CONFERENCE TIME AND DATE: May 10, 2019 at 9:00 am CT.

CONFERENCE CALL-IN: (512) 974-9300, Access Code 968108

LOCATION: MUNICIPAL BUILDING, 124 W 8th STREET
RM 308, AUSTIN, TEXAS 78701

**FOR CONTRACTUAL AND TECHNICAL
ISSUES CONTACT THE FOLLOWING
AUTHORIZED CONTACT PERSON:**

Primary:

Ricardo Zavala, MPA

Procurement Specialist III

Phone: (512) 974-2988

E-Mail: Ricardo.zavala2@austintexas.gov

PROPOSAL DUE PRIOR TO: June 4, 2019, at 2:00pm CT

PROPOSAL OPENING TIME AND DATE: June 4, 2019 at 3:00 pm CT

LOCATION: MUNICIPAL BUILDING, 124 W 8th STREET
RM 308, AUSTIN, TEXAS 78701

Secondary:

Lynnette Hicks, MBA

Procurement Specialist IV

Phone: (512) 974-3349

E-Mail: Lynnette.hicks@austintexas.gov

LIVE SOLICITATION OPENING ONLINE: For RFP's, only the names of respondents will be read aloud

For information on how to attend the Solicitation Closing online, please select this link:

<http://www.austintexas.gov/department/bid-opening-webinars>

When submitting a sealed Offer and/or Compliance Plan, use the proper address for the type of service desired, as shown below:

Address for US Mail (Only)	Address for FedEx, UPS, Hand Delivery or Courier Service
City of Austin	City of Austin, Municipal Building
Purchasing Office-Response Enclosed for Solicitation # RFP 5800 RJZ3005	Purchasing Office-Response Enclosed for Solicitation # RFP 5800 RJZ3005
P.O. Box 1088	124 W 8 th Street, Rm 308
Austin, Texas 78767-8845	Austin, Texas 78701
	Reception Phone: (512) 974-2500

NOTE: Offers must be received and time stamped in the Purchasing Office prior to the Due Date and Time. It is the responsibility of the Offeror to ensure that their Offer arrives at the receptionist's desk in the Purchasing Office prior to the time and date indicated. Arrival at the City's mailroom, mail terminal, or post office box will not constitute the Offer arriving on time. See Section 0200 for additional solicitation instructions.

All Offers (including Compliance Plans) that are not submitted in a sealed envelope or container will not be considered.

SUBMIT 1 ORIGINAL AND 1 ELECTRONIC COPY (USB FLASH DRIVE) OF YOUR RESPONSE

*****SIGNATURE FOR SUBMITTAL REQUIRED ON PAGE 4 OF THIS DOCUMENT*****

This solicitation is comprised of the following required sections. Please ensure to carefully read each section including those incorporated by reference. By signing this document, you are agreeing to all the items contained herein and will be bound to all terms.

SECTION NO.	TITLE	PAGES
0100	STANDARD PURCHASE DEFINITIONS	*
0200 V2	STANDARD SOLICITATION INSTRUCTIONS, UPDATED JUNE 26, 2018	*
0300	STANDARD PURCHASE TERMS AND CONDITIONS	*
0400	SUPPLEMENTAL PURCHASE PROVISIONS	5
0500	SCOPE OF WORK	7
0600	PROPOSAL PREPARATION INSTRUCTIONS & EVALUATION FACTORS	4
0605	LOCAL BUSINESS PRESENCE IDENTIFICATION FORM – Complete and return	2
0700	REFERENCE SHEET – Complete and return	1
0800	NON-DISCRIMINATION AND NON-RETALIATION CERTIFICATION–Complete and return	2
0805	NON-SUSPENSION OR DEBARMENT CERTIFICATION	*
0810 V2	NON-COLLUSION, NON-CONFLICT OF INTEREST, AND ANTI-LOBBYING CERTIFICATION, UPDATED JUNE 26, 2018	*
0815	LIVING WAGES CONTRACTOR CERTIFICATION–Complete and return	1
0835	NONRESIDENT BIDDER PROVISIONS – Complete and return	1
0840	SERVICE-DISABLED VETERAN BUSINESS ENTERPRISE – Complete and return	1
0900	SUBCONTRACTING/SUB-CONSULTING UTILIZATION FORM – Complete & return	1
0905	SUBCONTRACTING/SUB-CONSULTING UTILIZATION PLAN – Complete and return if applicable	3

*** Documents are hereby incorporated into this Solicitation by reference, with the same force and effect as if they were incorporated in full text. The full text versions of the * Sections are available on the Internet at the following online address:**

http://www.austintexas.gov/financeonline/vendor_connection/index.cfm#STANDARDBIDDOCUMENTS

If you do not have access to the Internet, you may obtain a copy of these Sections from the City of Austin Purchasing Office located in the Municipal Building, 124 West 8th Street, Room #308 Austin, Texas 78701; phone (512) 974-2500. Please have the Solicitation number available so that the staff can select the proper documents. These documents can be mailed, expressed mailed, or faxed to you.

The undersigned, by his/her signature, represents that he/she is submitting a binding offer and is authorized to bind the respondent to fully comply with the solicitation document contained herein. The Respondent, by submitting and signing below, acknowledges that he/she has received and read the entire document packet sections defined above including all documents incorporated by reference, and agrees to be bound by the terms therein.

Company Name: _____

Company Address: _____

City, State, Zip: _____

Vendor Registration No. _____

Printed Name of Officer or Authorized Representative: _____

Title: _____

Signature of Officer or Authorized Representative: _____

Date: _____

Email Address: _____

Phone Number: _____

*** Proposal response must be submitted with this signed Offer sheet to be considered for award**

**CITY OF AUSTIN
PURCHASING OFFICE
SUPPLEMENTAL PURCHASE PROVISIONS
RFP 5800 RJZ3005**

The following Supplemental Purchasing Provisions apply to this solicitation:

1. **EXPLANATIONS OR CLARIFICATIONS:** (reference paragraph 5 in Section 0200)

All requests for explanations or clarifications must be submitted in writing to the Purchasing Office by May 13, 2019 by 2:00pm CT to Ricardo.zavala2@austintexas.gov.

2. **INSURANCE:** Insurance is required for this solicitation.

A. **General Requirements:** See Section 0300, Standard Purchase Terms and Conditions, paragraph 32, entitled Insurance, for general insurance requirements.

- i. The Contractor shall provide a Certificate of Insurance as verification of coverages required below to the City at the below address prior to contract execution and within 14 calendar days after written request from the City. Failure to provide the required Certificate of Insurance may subject the Offer to disqualification from consideration for award
- ii. The Contractor shall not commence work until the required insurance is obtained and until such insurance has been reviewed by the City. Approval of insurance by the City shall not relieve or decrease the liability of the Contractor hereunder and shall not be construed to be a limitation of liability on the part of the Contractor.
- iii. The Contractor must also forward a Certificate of Insurance to the City whenever a previously identified policy period has expired, or an extension option or holdover period is exercised, as verification of continuing coverage.
- iv. The Certificate of Insurance, and updates, shall be mailed to the following address:

City of Austin Purchasing Office
P. O. Box 1088
Austin, Texas 78767

OR

PURInsuranceCompliance@austintexas.gov

B. **Specific Coverage Requirements:** The Contractor shall at a minimum carry insurance in the types and amounts indicated below for the duration of the Contract, including extension options and hold over periods, and during any warranty period. These insurance coverages are required minimums and are not intended to limit the responsibility or liability of the Contractor.

- i. **Worker's Compensation and Employers' Liability Insurance:** Coverage shall be consistent with statutory benefits outlined in the Texas Worker's Compensation Act (Section 401). The minimum policy limits for Employer's Liability are \$100,000 bodily injury each accident, \$500,000 bodily injury by disease policy limit and \$100,000 bodily injury by disease each employee.
 - (1) The Contractor's policy shall apply to the State of Texas and include these endorsements in favor of the City of Austin:
 - (a) Waiver of Subrogation, Form WC420304, or equivalent coverage
 - (b) Thirty (30) days Notice of Cancellation, Form WC420601, or equivalent coverage
- ii. **Commercial General Liability Insurance:** The minimum bodily injury and property damage per occurrence are \$500,000 for coverages A (Bodily Injury and Property Damage) and B (Personal and Advertising Injury).
 - (1) The policy shall contain the following provisions:
 - (a) Contractual liability coverage for liability assumed under the Contract and all other Contracts related to the project.
 - (b) Contractor/Subcontracted Work.
 - (c) Products/Completed Operations Liability for the duration of the warranty period.

**CITY OF AUSTIN
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- (d) If the project involves digging or drilling provisions must be included that provide Explosion, Collapse, and/or Underground Coverage.
 - (2) The policy shall also include these endorsements in favor of the City of Austin:
 - (a) Waiver of Subrogation, Endorsement CG 2404, or equivalent coverage
 - (b) Thirty (30) days Notice of Cancellation, Endorsement CG 0205, or equivalent coverage
 - (c) The City of Austin listed as an additional insured, Endorsement CG 2010, or equivalent coverage
 - iii. **Business Automobile Liability Insurance:** The Contractor shall provide coverage for all owned, non-owned and hired vehicles with a minimum combined single limit of \$500,000 per occurrence for bodily injury and property damage. Alternate acceptable limits are \$250,000 bodily injury per person, \$500,000 bodily injury per occurrence and at least \$100,000 property damage liability per accident.
 - (1) The policy shall include these endorsements in favor of the City of Austin:
 - (a) Waiver of Subrogation, Endorsement CA0444, or equivalent coverage
 - (b) Thirty (30) days Notice of Cancellation, Endorsement CA0244, or equivalent coverage
 - (c) The City of Austin listed as an additional insured, Endorsement CA2048, or equivalent coverage.
- C. **Endorsements:** The specific insurance coverage endorsements specified above, or their equivalents must be provided. In the event that endorsements, which are the equivalent of the required coverage, are proposed to be substituted for the required coverage, copies of the equivalent endorsements must be provided for the City's review and approval.
3. **TERM OF CONTRACT:**
- A. The Contract shall commence upon execution, unless otherwise specified, and shall remain in effect for an initial term of twelve (12) months and an optional twelve (12) month extension at the City sole discretion.
 - B. Upon expiration of the initial term or any period of extension, the Contractor agrees to hold over under the terms and conditions of this Contract for such a period of time as is reasonably necessary for the City to re-solicit and/or complete the deliverables due under this Contract. Any hold over period will not exceed 120 calendar days unless mutually agreed on by both parties in writing.
 - C. Upon written notice to the Contractor from the City's Purchasing Officer or his designee and acceptance of the Contractor, the term of this contract shall be extended on the same terms and conditions for an additional period as indicated in paragraph A above.
4. **INVOICES and PAYMENT:** (reference paragraphs 12 and 13 in Section 0300)
- A. Invoices shall contain a unique invoice number and the information required in Section 0300, paragraph 12, entitled "Invoices." Invoices received without all required information cannot be processed and will be returned to the vendor.

Invoices shall be mailed to the below address:

	City of Austin
Department	Human Resources Department
Attn:	Sheila Balog, Organizational Development Manager
Address	P.O. Box 1088

**CITY OF AUSTIN
PURCHASING OFFICE
SUPPLEMENTAL PURCHASE PROVISIONS
RFP 5800 RJZ3005**

City, State Zip Code	Austin, TX 78767
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- B. The Contractor agrees to accept payment by either credit card, check or Electronic Funds Transfer (EFT) for all goods and/or services provided under the Contract. The Contractor shall factor the cost of processing credit card payments into the Offer. There shall be no additional charges, surcharges, or penalties to the City for payments made by credit card.

5. LIVING WAGES:

The City's Living Wage Program, Rule R161-17.14, is located at:

<http://www.austintexas.gov/edims/document.cfm?id=277854>

- A. The minimum wage required for all Contractor Employees (and all tiers of Subcontracting) directly assigned to this City Contract is \$15.00 per hour, unless Published Wage Rates are included in this solicitation. In addition, the City may stipulate higher wage rates in certain solicitations in order to assure quality and continuity of service.
- B. The City requires Contractors submitting Offers on this Contract to provide a certification (**see the Living Wages Contractor Certification included in the Solicitation**) with their Offer certifying that all Contractor Employees (and all tiers of Subcontracting) directly assigned to this City Contract will be paid a minimum living wage equal to or greater than \$15.00 per hour. The certification shall include a list of all Contractor Employees (and all tiers of Subcontracting) directly assigned to providing services under the resultant contract including their name and job title. The list shall be updated and provided to the City as necessary throughout the term of the Contract.
- C. The Contractor shall maintain throughout the term of the resultant contract basic employment and wage information for each employee as required by the Fair Labor Standards Act (FLSA).
- D. The Contractor shall provide to the Department's assigned Contract Manager with the first invoice, individual Employee Certifications for all Contractor Employees (and all tiers of Subcontracting) directly assigned to the contract. The City reserves the right to request individual Employee Certifications at any time during the contract term. Employee Certifications shall be signed by each Contractor Employee (and all tiers of Subcontracting) directly assigned to the contract. The Employee Certification form is available on-line at https://www.austintexas.gov/financeonline/vendor_connection/index.cfm.
- E. Contractor shall submit employee certifications for Contractor Employees (and all tiers of Subcontracting) annually on the anniversary date of contract award with the respective invoice to verify that employees are paid the Living Wage throughout the term of the contract. The Employee Certification Forms shall be submitted for Contractor Employees (and all tiers of Subcontracting) added to the contract and/or to report any employee changes as they occur.
- F. The Department's assigned Contract Manager will periodically review the employee data submitted by the Contractor to verify compliance with this Living Wage provision. The City retains the right to review employee records required in paragraph C above to verify compliance with this provision.

6. NON-COLLUSION, NON-CONFLICT OF INTEREST, AND ANTI-LOBBYING:

- A. On June 14, 2018, the Austin City Council adopted Ordinance No. 20180614-056 replacing Chapter 2.7, Article 6 of the City Code relating to Anti-Lobbying and Procurement. The policy defined in this Code applies to Solicitations for goods and/or services requiring City Council approval under City Charter Article VII, Section 15 (Purchase Procedures). The City requires Offerors submitting Offers on this Solicitation to certify that the Offeror has not in any way directly or indirectly had communication restricted in the ordinance section 2-7-104 during the No-Lobbying Period as defined in the Ordinance. The text of the City Ordinance is posted on the Internet at:

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https://assets.austintexas.gov/purchase/downloads/New_ALO_Ordinance_No_20180614-056.pdf
and is also included in the Solicitation, [Section 0200 V2, Solicitation Instructions June 26, 2018](#).

7. NON-SOLICITATION:

- A. During the term of the Contract, and for a period of six (6) months following termination of the Contract, the Contractor, its affiliate, or its agent shall not hire, employ, or solicit for employment or consulting services, a City employee employed in a technical job classification in a City department that engages or uses the services of a Contractor employee.
- B. In the event that a breach of Paragraph A occurs the Contractor shall pay liquidated damages to the City in an amount equal to the greater of: (i) one (1) year of the employee's annual compensation; or (ii) 100 percent of the employee's annual compensation while employed by the City. The Contractor shall reimburse the City for any fees and expenses incurred in the enforcement of this provision.
- C. During the term of the Contract, and for a period of six (6) months following termination of the Contract, a department that engages the services of the Contractor or uses the services of a Contractor employee will not hire a Contractor employee while the employee is performing work under a Contract with the City unless the City first obtains the Contractor's approval.
- D. In the event that a breach of Paragraph C occurs, the City shall pay liquidated damages to the Contractor in an amount equal to the greater of: (i) one (1) year of the employee's annual compensation or (ii) 100 percent of the employee's annual compensation while employed by the Contractor.

8. WORKFORCE SECURITY CLEARANCE AND IDENTIFICATION (ID):

- A. Access to the Human Resources Department building and any City department by the Contractor, all subcontractors and their employees will be strictly controlled at all times by the City. Security badges will be issued by the Department for this purpose. The Contractor shall submit a complete list of all persons requiring access to the Human Resources Department building and any City department building at least thirty (30) days in advance of their need for access. The City reserves the right to deny a security badge to any Contractor personnel for reasonable cause. The City will notify the Contractor of any such denial no more than twenty (20) days after receipt of the Contractor's submittal.
- B. Where denial of access by a particular person may cause the Contractor to be unable to perform any portion of the work of the contract, the Contractor shall so notify the City's Contract Manager, in writing, within ten (10) days of the receipt of notification of denial.
- C. Contractor personnel will be required to check in at the security desk when entering or leaving the Human Resources Department building and any City department building and security badges must be on display at all times when in the building. Failure to do so may be cause for removal of Contractor Personnel from the worksite, without regard to Contractor's schedule. Security badges may not be removed from the premises.
- D. The Contractor shall provide the City's Contract Manager with a list of personnel scheduled to enter the building, seven days in advance. The list shall identify the persons by name, date of birth, driver's license number, the times that they will be inside the building and the areas where they will be working. Only persons previously approved by the City for the issuance of security badges will be admitted to the building.
- E. The Contractor shall comply with all other security requirements imposed by the City and shall ensure that all employees and subcontractors are kept fully informed as to these requirements.

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9. **CONTRACT MANAGER:** The following person is designated as Contract Manager, and will act as the contact point between the City and the Contractor during the term of the Contract:

Sheila Balog, Organizational Development Director

(512) 530-8207

Sheila.Balog@austintexas.gov

*Note: The above listed Contract Manager is not the authorized Contact Person for purposes of the **NON-COLLUSION, NON-CONFLICT OF INTEREST, AND ANTI-LOBBYING Provision** of this Section; and therefore, contact with the Contract Manager is prohibited during the no contact period.

Scope of Work - Implicit Bias Training

SOLICITATION NO. RFP 5800 RJZ3005

1.0 Introduction

About the City of Austin

The City of Austin, Texas, population 840,000, is the 13th largest City in the country. This vibrant and dynamic City tops numerous “Best” lists for business, entertainment, cost of living and quality of life. Austin was selected as the “Best City for the Next Decade” (Kiplinger), the “Top Creative Center” in the US (Entrepreneur.com), and is in the Top Seven List of Intelligent Communities for 2012 as ranked by the Intelligent Community Forum. Austin continues to lead the country with its vision of being the “Most Livable City in the Country”, emerging as a player on the international scene with such events as SXSW, Formula 1 and being home to companies such as Apple, Samsung, Dell, The Seton Healthcare Family and St. David's HealthCare systems. From the home of state government and the City of Texas to the “Live Music Capital of the World” and its growth as a film center, Austin has gained worldwide attention as a hub for education, business, health, and sustainability. Since 1900, Austin's population has doubled every 20 years, with continued projected record-breaking growth into the next decade and beyond.

2.0 Purpose

The City of Austin from now on referred to as the “City,” seeks proposals from firms (hereafter referred to as “Contractor”) with experience and specialization in creating and providing training and development to employees in implicit bias and cultural competence. The proposal should include the development of training curriculum that is unique to the needs of the City. The developed curriculum will be provided to all City employees, from Executives level employees to individual contributors and front-line employees. The City anticipates a one (1) year contract with an optional twelve (12) extension.

3.0 Background

The City engaged a group of community and City leaders for the Mayor's Task Force on Institutional Racism and Inequities. This Task Force recognized the need to dismantle systemic racism and inequities in the City at its various levels. At the core is the personal level; followed by the institutional, structural and systemic systems. Implicit Bias will begin to address the personal level by engaging individuals in committing to lifelong training while learning to have courageous conversations about race and equity.

4.0 **Tasks/Requirements**

4.1 ***Contractor's Responsibilities***

The contractor shall provide a proposal that includes several phases in the development and implementation of training.

Phase 1:

- 4.1.1. The contractor shall review and include concepts from the documents referenced below:

Links issued regarding Institutional Racism and Systemic Inequities using the following materials

1. <http://www.austintexas.gov/edims/document.cfm?id=292037>
2. <http://www.austintexas.gov/edims/document.cfm?id=274706>

In addition, utilize the City Values as part of the materials;

3. <http://www.austintexas.gov/department/pride-vision-and-values>

And the City of Austin Strategic Direction 2023;

4. <https://austinstrategicplan.bloomfire.com/posts/3301043-austin-strategic-direction-2023-final>

Utilize the City Personnel Policies as reference material.

- 4.1.2. The contractor shall schedule meetings with the listed Entities/City Affinity Groups to include information and perspectives in the developed training. The contractor shall have a preset list of topics/questions to ensure that they are including important ideas, events, information and local history from these communities in the training. Typically, it would require communicating with several of the following entities representatives. The information gathering can be done over the phone or in person.

- a. Asian American Employee Network
- b. African American Employee Network
- c. Austin Hispanic/Latino Network
- d. Stonewall Equality Employee Network
- e. Woman to Woman Network
- f. Human Resources Department
- g. Equity Office

- 4.1.3. The contractor shall develop a tool or resource the contractor shall use to measure the current culture related to diversity, inclusion, implicit bias. The contractor shall provide a summary document to the City Contract Manager within 21 calendar days of completing meetings with the mentioned groups in 4.1.2. In addition, an Excel file should accompany the summary document with both the raw results of the data along with any graphs and charts.

- a. Conduct a survey using the developed tool to measure the City's current culture.
- b. Provide a tool to the City to use in future reviews to gauge progress

- 4.1.4. The contractor shall design a conversation driven training curriculum that introduces the workforce to inclusion and bias and the impact it has on decisions made in the workplace. Curriculum should be completed within 28 calendar days of conducting the survey in 4.1.3.b. The City Contract Manager should review the curriculum before

implementation. The curriculum should be provided for different levels of the City Workforce.

- a. Executive
- b. Manager
- c. Supervisor
- d. Individual Contributor

4.1.5. As part of the training curriculum, provide tools electronically that City can use to facilitate a more inclusive workplace. This information shall be sent to the City Contract Manager in a Word Document at the same time the curriculum is completed using email. Include bias reduction strategies (such as promoting counter-stereotypic exemplars to challenge implicit stereotype endorsement and its effects) and bias mitigation strategies.

- a. Resources or strategies to report complaints or concerns

4.1.6. Provide an overview of Phase I within 14 calendar days of completion of Phase I, and how it will be used in the development of materials to be delivered to the Human Resources Department

Phase 2:

4.2 Design and Deliver Diversity and Inclusion Education Program

4.2.1 Develop customized training for Executives and Managers based on findings from Phase I using Curriculum developed in 4.1.4. Customized training plan should be completed 21 calendar days from the final approval of curriculum.

4.2.2 Provide a plan electronically to the City Contract Manager within 14 calendar days of approval of the training plan to roll out training to the following populations. This should include direct delivery options for direct instruction for Executives and Managers. These materials should be provided in a format that is compatible with the software of the City.

1.Executive – Approximately 200 individuals

2.Managers – Approximately 700 individuals

4.2.3 Design a tool to evaluate the effectiveness of the training provided to Executives and Managers at the time the training plan roll out is delivered.

4.2.3.1 Report findings of the training effectiveness tool and prepare any subsequent training updates in a Word document to the City Manager's Office and Human Resources within 21 calendar days of delivery of the roll out plan.

4.2.4 The contractor shall develop and deliver a customized training of a train-the-trainer session for City Learning Professionals to deliver to employees who supervise others and to the individual contributor populations at the City within 28 calendar days after delivering roll out plan

4.2.5 Deliver the customized train the trainer learning session to City Learning Professionals identified by the City at a date to be named by the City.

- 4.2.6 Provide a plan to roll out plan to the City Contract Manager for the Supervisors (1300) and Individual contributor populations (10,500) the training at a date to be named by the City
- 4.2.7 The Training designed for the Supervisors and Individual Contributors should not be longer than 6 hours in length.
- 4.2.8 Provide and confer ownership of the complete set tools and training materials (instructors guide, any handouts, and links to any video material/slides and Train the Trainer materials) to the City. These materials should be provided in a format that is compatible with the software of the City.
- 4.2.9 Remain available for curriculum adjustments as necessary during the initial rollout of the material, up to 15 months after the launch of the Roll-out Plan for the Supervisor Population

Phase 3:

- 4.3 Design and provide a post-training assessment to measure knowledge retention that must be reviewed and approved by the City Contract Manager; and must be provided in a format that can easily be launched through a currently available COA compatible software.
 - 4.3.1 Design post-training assessment of the organizational culture and attitudes of inclusion that must be reviewed and approved by the City Contract Manager; and must be provided in a format that can easily be launched through currently available COA compatible software.
 - 4.3.2 Design a tool or survey that mirrors the same tool used at the onset of the training design to assess behavior change at the time the post-training assessment is delivered. Behavior change is often measured using self-report assessments of behavioral intentions for real-life interventions. The tools should provide for:
 - 4.3.3 Frequent assessments, using relevant measures over extended time periods (to chart changes), with control groups.
 - 4.3.4 To measure behavior change in participants and include the measure on how the subjects of bias perceive participants' behavior change. The tool should measure actual changes in behavior, as opposed to behavioral intentions.

5.0 **Evaluation Criteria**

5.1.1 **Demonstrated Applicable Experience**

Contractor shall have five years' experience minimum in each of these areas:

- a. Carrying out similar training in other local governments or nonprofits
- b. Developing training materials for senior level managers and supervisors
- c. Creating easy to understand materials for the Train-The-Trainer on Implicit Bias
- d. Providing workplace training on Implicit Bias to, at minimum, one hundred individuals previously

5.1.2 **Personnel Qualifications**

Contractor shall provide and demonstrate:

- a. A description of their accreditation, certification and/or one letter of recommendation from a governmental, relevant subject matter professional organization or non-profit agency showing previous experience providing Implicit Bias training
- b. Provide a one (1) page executive summary demonstrating how previous Implicit Bias training your firm conducted had a positive impact on the

- workforce your firm trained
- c. Provide a one (1) page executive summary demonstrating past ability to design post-training assessments to measure knowledge retention

6.0 **Deliverables/Milestones**

Deliverables/Milestones	Description	Timeline (due/completion date, reference date, or frequency)	Performance Measure/ Acceptance Criteria	Contract Reference/ Section
Overview Assessment of development materials and Initial Assessment	Contractor shall complete a Needs Assessment to gauge the current organizational culture and climate-related to inclusion and diversity and report the findings to the City Manager's Office	Within 60 days of Contract Execution	<i>Assess the Current State</i> – Executive interviews, on-line focus groups, HR data analysis, sampling of performance evaluations, program and policy review, and review of any internal surveys. A presentation of the current state is previewed with the appropriate people before presenting to your Leadership Team.	
Design and Deliver Training to Executive and Manager Populations	Measure the executive team's inclusion and provide direct delivery of the Inclusive Leadership training for the Senior Leadership Team.	Within 21 days contract execution	Share results and provide individual feedback and coaching with each executive team member.	
Plan a rollout of the material to Executives and Managers	Prepare and present a rollout plan for the direct delivery curriculum	Within 28 days	Share plan with the City Manager's office and Human Resources	
Review and Assess effectiveness initial training delivery	At the conclusion of the first roll out phase, measure and present the findings of the effectiveness and success of the material being presented	Within 14 calendar days	Share results with the City Manager's Office and Human Resources	
Design and provide direct delivery of secondary trainer leader participants select City Learning Professionals in	Build organizational capacity for leading courageous conversations.	14 calendar days	Provide the complete set tools and training materials (instructors guide, any handouts, and links to any video material/slides and Train the Trainer materials) to	

Deliverables/Milestones	Description	Timeline (due/completion date, reference date, or frequency)	Performance Measure/ Acceptance Criteria	Contract Reference/ Section
the training			the City Design a post-training assessment to measure knowledge retention	
Design curriculum of up to a 6-hour supervisors and individual contributors	Implicit bias training, with in-person and online options, targeted to the appropriate employee group.	28 calendar days	Share materials for review with the Human Resources Department	
Provide all of the collateral designed for the Train the Trainer	Confer all instructors' guides and aids, participant materials, visual resources and tools to the City	TBD	Share materials for review with the Human Resources Department	
Plan a rollout of the materials to the supervisors and individual contributors	Prepare and present a timeline and rollout plan for the Train the Trainer group to deliver materials to the City populations based on patterns and information identified in the initial assessment.	TBD	Share plan with the City Manager's office and Human Resources	
Design a tool or framework for supervisor and managers to lead a 1 hour facilitated conversation with workgroups	Design a training curriculum (that is conversation driven) that introduces the workforce to inclusion and bias and the impact it has on decisions made in the workplace.	TBD	Design a post-training assessment to measure knowledge retention and to continue the conversation. Scorecards and leveraging other organizational metrics to measure progress relative to the City's vision and goals.	
Design a tool or framework for departments to continually assess	Develop a framework, tool or assessment that will allow departments or individual workgroups to continually	TBD	Scorecards and leveraging other organizational metrics to measure progress	

Deliverables/Milestones	Description	Timeline (due/completion date, reference date, or frequency)	Performance Measure/ Acceptance Criteria	Contract Reference/ Section
the culture in each workgroups	assess and measure the organizational culture based on outcomes training curriculum		relative to the City's vision and goals.	
Glossary of Terms to increase the shared understanding of key implicit bias, diversity and equity terminology	To facilitate dialogue, we believe that there needs to be common language of implicit bias, diversity, racism and other language at the City.	21 days after executing contract	An electronic resource document not meant to be exhaustive. Because of the way that language works, particularly around these concepts, it is important to note that many of these terms continue to evolve.	

**CITY OF AUSTIN
PURCHASING OFFICE
PROPOSAL PREPARATION INSTRUCTIONS AND EVALUATION FACTORS
SOLICITATION NUMBER: RFP 5800 RJZ3005**

1. PROPOSAL FORMAT

Submit one (1) electronic copy of the original response in PDF version on a thumb drive and one (1) original paper copy of the proposal. The original response shall contain ink signatures and shall be typed on standard 8 1/2" x 11" paper, double-sided, and have consecutively numbered pages.

The response itself shall be organized in the following format and informational sequence. Failure to submit all required documents requested may result in disqualification of response. Use tabs to divide each part of the response and include a Table of Contents:

Prefacing the proposal, the Proposer shall provide an Executive Summary of three (3) pages or less, which gives in brief, concise terms, a summation of the proposal.

- A. **Part I - Business Organization:** State full name and address of your organization and identify parent company if you are a subsidiary. Specify the branch office or other subordinate element which will perform, or assist in performing, work herein. Indicate whether you operate as a partnership, corporation, or individual. Include the State in which incorporated or licensed to operate.
- B. **Part II - System Concept and Solution:** Define in detail your understanding of the requirement presented in the Scope of Work of this request for proposal and your system solution. Provide all details as required in the Scope of Work and any additional information you deem necessary to evaluate your proposal.
- C. **Part III - Program:** Describe your technical plan for accomplishing required work. Include such time-related displays, graphs, and charts as necessary to show tasks, sub-tasks, milestones, and decision points related to the Scope of Work and your plan for accomplishment. Specifically indicate:
 - i. A description of your work program by tasks. Detail the steps you will take in proceeding from Task 1 to the final tasks.
 - ii. The technical factors that will be considered in section above, and the depth to which each will be treated.
 - iii. The degree of definition provided in each technical element of your plan.
 - iv. The points at which written, deliverable reports will be provided.
 - v. A statement of your compliance with all applicable rules and regulations of Federal, State and Local governing entities. The Proposer must state his compliance with terms of this Request for Proposal (RFP).
- D. **Part IV - Project Management Structure:** Provide a general explanation and chart which specifies project leadership and reporting responsibilities; and interface the team with City project management and team personnel. If use of subcontractors is proposed, identify their placement in the primary management structure, and provide internal management description for each subcontractor.
- E. **Part V - Prior Experience:** Describe only relevant corporate experience and individual experience for personnel who will be actively engaged in the project. Include the number of solutions that were developed within the timeframe identified. Do not include corporate experience unless personnel assigned to this project actively participated. Do not include experience prior to 1998. Supply the

**CITY OF AUSTIN
PURCHASING OFFICE
PROPOSAL PREPARATION INSTRUCTIONS AND EVALUATION FACTORS
SOLICITATION NUMBER: RFP 5800 RJZ3005**

project title, year, and reference name, title, present address, and phone number of principal person for whom prior projects were accomplished. Reference 0500 Scope of Work Item 5.0.

- F. **Part VI - Personnel:** Include names and qualifications of all professional personnel who will be assigned to this project, and how long they have worked on similar solutions. State the primary work assigned to each person and the percentage of time each person will devote to this work. Identify key persons by name and title. Provide all resumes.
- G. **Part VII - Local Business Presence:** The City seeks opportunities for businesses in the Austin Corporate City Limits to participate on City contracts. A firm (Offeror or Subcontractor) is considered to have a Local Business Presence if the firm is headquartered in the Austin Corporate City Limits, or has a branch office located in the Austin Corporate City Limits in operation for the last five (5) years, currently employs residents of the City of Austin, Texas, and will use employees that reside in the City of Austin, Texas, to support this contract. The City defines headquarters as the administrative center where most of the important functions and full responsibility for managing and coordinating the business activities of the firm are located. The City defines branch office as a smaller, remotely located office that is separate from a firm's headquarters that offers the services requested and required under this solicitation. Points will be awarded through a combination of the Offeror's Local Business Presence and/or the Local Business Presence of their subcontractors. Evaluation of the Team's Percentage of Local Business Presence will be based on the dollar amount of work as reflected in the Offeror's MBE/WBE Compliance Plan or MBE/WBE Utilization Plan. Specify if and by which definition the Offeror or Subcontractor(s) have a local business presence.
- H. **Part VIII – Service-Disabled Veteran Business Enterprise (“SDVBE”):** Pursuant to the interim Service-Disabled Veteran Business Enterprise (SDVBE) Program, Offerors submitting proposals in response to a Request for Proposals shall receive a three point (3 percent) preference if the Offeror, at the same time the proposal is submitted, is certified by the State of Texas, Comptroller of Public Accounts as a Historically Underutilized Business and is a Service-Disabled Veteran Business Enterprise. This preference does not apply to subcontractors. To receive this preference, Offerors shall complete the enclosed Section 0840 Service-Disabled Veterans Business Enterprise Preference Form, in accordance with the Additional Solicitation Instructions included therein.
- I. **Part X - Proposal Acceptance Period:** *All proposals are valid for a period of one hundred and twenty (120) calendar days subsequent to the RFP closing date unless a longer acceptance period is offered in the proposal*
- J. **Part XI - Proprietary Information:** *All material submitted to the City becomes public property and is subject to the Texas Open Records Act upon receipt. If a Proposer does not desire proprietary information in the proposal to be disclosed, each page must be identified and marked proprietary at time of submittal. The City will, to the extent allowed by law, endeavor to protect such information from disclosure. The final decision as to what information must be disclosed, however, lies with the Texas Attorney General. Failure to identify proprietary information will result in all unmarked sections being deemed non-proprietary and available upon public request.*
- K. **Part XII - Authorized Negotiator:** Include name, address, and telephone number of person in your organization authorized to negotiate Contract terms and render binding decisions on Contract matters.
- L. **Part XIII - Cost Proposal:** Information described in the following subsections is required from each Proposer. Your method of costing may or may not be used but should be described. A firm fixed price or not-to-exceed Contract is contemplated, with progress payments as mutually determined to be appropriate.
- i. Manpower. Itemize to show the following for each category of personnel with separate hourly

**CITY OF AUSTIN
PURCHASING OFFICE
PROPOSAL PREPARATION INSTRUCTIONS AND EVALUATION FACTORS
SOLICITATION NUMBER: RFP 5800 RJZ3005**

rates:

- (1) manager, senior consultant, analyst, subcontractor, etc.
 - (2) estimated hours for each category of personnel
 - (3) rate applied for each category of personnel
 - (4) total cost
- ii. Itemize cost of supplies and materials
 - iii. Other itemized direct costs
 - iv. If applicable, general and administrative burden. Indicate base used, percentage, and total cost relative to this procurement.
 - v. Travel expenses. All travel lodging expenses in connection with the Contract for which reimbursement may be claimed by the Contractor under the terms of the Solicitation will be reviewed against the City's Travel Policy as published and maintained by the City's Controller's Office and the Current United States General Services Administration Domestic Per Diem Rates (the "Rates") as published and maintained on the Internet at:

http://www.gsa.gov/Portal/gsa/ep/contentView.do?contentId=17943&contentType=GSA_BASIC

No amounts in excess of the Travel Policy or Rates shall be paid. All invoices must be accompanied by copies of detailed receipts (e.g. hotel bills, airline tickets). No reimbursement will be made for expenses not actually incurred. Airline fares in excess of coach or economy will not be reimbursed. Mileage charges may not exceed the amount permitted as a deduction in any year under the Internal Revenue Code or Regulations.
 - vi. Printing. State separately the cost of furnishing copies of the final report (if applicable).
 - vii. Total cost schedule.

2. EXCEPTIONS:

Be advised that exceptions to any portion of the Solicitation may jeopardize acceptance of the Proposal. Reference Section 0630, Exceptions.

3. PROPOSAL PREPARATION COSTS:

All costs directly or indirectly related to preparation of a response to the RFP or any oral presentation required to supplement and/or clarify a proposal which may be required by the City shall be the sole responsibility of the Proposer.

**CITY OF AUSTIN
PURCHASING OFFICE
PROPOSAL PREPARATION INSTRUCTIONS AND EVALUATION FACTORS
SOLICITATION NUMBER: RFP 5800 RJZ3005**

4. EVALUATION FACTORS AND AWARD

A. **Competitive Selection:** This procurement will comply with applicable City Policy. The successful Proposer will be selected by the City on a rational basis. Evaluation factors outlined in Paragraph B below shall be applied to all eligible, responsive Proposers in comparing proposals and selecting the Best Offeror. Award of a Contract may be made without discussion with Proposers after proposals are received. Proposals should, therefore, be submitted on the most favorable terms.

B. **Evaluation Factors:**

i. 100 points.

- (1) System Concept and Solutions Proposed (Grasp of the requirement and its solution(s), responsiveness to terms and conditions, completeness and thoroughness of the technical data and documentation. Such as Culture Tool, Training Curriculum, and Strategies to Report Complaints Reference 0500, Section 4.1.3., 4.1.4, 4.1.5) Maximum 24 points
- (2) Demonstrated Applicable Experience (Reference 0500, Section 5.1.1) Maximum 23 points
- (3) Personnel Qualifications (Reference 0500, Section 5.1.2) Maximum 20 points
- (4) Total Evaluated Cost Maximum 20 points
(Reference 0600, Part XIII)
- (5) Service-Disabled Veteran Business Enterprise Preference (3 points)
- (6) LOCAL BUSINESS PRESENCE (Maximum 10 points)

Team's Local Business Presence	Points Awarded
Local business presence of 90% to 100%	10
Local business presence of 75% to 89%	8
Local business presence of 50% to 74%	6
Local business presence of 25% to 49%	4
Local presence of between 1 and 24%	2
No local presence	0

- ii. Presentations, Demonstrations Optional. The City will score proposals on the basis of the criteria listed above. The City may select a "short list" of Proposers based on those scores. "Short-listed" Proposers may be invited for presentations, or demonstrations with the City. The City reserves the right to re-score "short-listed" proposals as a result, and to make award recommendations on that basis.

Section 0605: Local Business Presence Identification

A firm (Offeror or Subcontractor) is considered to have a Local Business Presence if the firm is headquartered in the Austin Corporate City Limits, or has a branch office located in the Austin Corporate City Limits in operation for the last five (5) years, currently employs residents of the City of Austin, Texas, and will use employees that reside in the City of Austin, Texas, to support this Contract. The City defines headquarters as the administrative center where most of the important functions and full responsibility for managing and coordinating the business activities of the firm are located. The City defines branch office as a smaller, remotely located office that is separate from a firm's headquarters that offers the services requested and required under this solicitation.

OFFEROR MUST SUBMIT THE FOLLOWING INFORMATION FOR EACH LOCAL BUSINESS (INCLUDING THE OFFEROR, IF APPLICABLE) TO BE CONSIDERED FOR LOCAL PRESENCE.

NOTE: ALL FIRMS MUST BE IDENTIFIED ON THE MBE/WBE COMPLIANCE PLAN OR NO GOALS UTILIZATION PLAN (REFERENCE SECTION 0900).

USE ADDITIONAL PAGES AS NECESSARY

OFFEROR:

Name of Local Firm		
Physical Address		
Is your headquarters located in the Corporate City Limits? (circle one)	Yes	No
or		
Has your branch office been located in the Corporate City Limits for the last 5 years?	Yes	No
Will your business be providing additional economic development opportunities created by the contract award? (e.g., hiring, or employing residents of the City of Austin or increasing tax revenue?)	Yes	No

SUBCONTRACTOR(S):

Name of Local Firm		
Physical Address		
Is your headquarters located in the Corporate City Limits? (circle one)	Yes	No
or		
Has your branch office been located in the Corporate City Limits for the last 5 years	Yes	No

Will your business be providing additional economic development opportunities created by the contract award? (e.g., hiring, or employing residents of the City of Austin or increasing tax revenue?)	Yes	No

SUBCONTRACTOR(S):

Name of Local Firm		
Physical Address		
Is your headquarters located in the Corporate City Limits? (circle one)	Yes	No
or		
Has your branch office been located in the Corporate City Limits for the last 5 years	Yes	No
Will your business be providing additional economic development opportunities created by the contract award? (e.g., hiring, or employing residents of the City of Austin or increasing tax revenue?)	Yes	No

Section 0700: Reference Sheet

Responding Company Name _____

The City at its discretion may check references in order to determine the Offeror's experience and ability to provide the products and/or services described in this Solicitation. The Offeror shall furnish at least 3 complete and verifiable references. References shall consist of customers to whom the offeror has provided the same or similar services within the last 5 years. References shall indicate a record of positive past performance.

1. Company's Name _____

Name and Title of Contact _____

Project Name _____

Present Address _____

City, State, Zip Code _____

Telephone Number (____) _____ Fax Number (____) _____

Email Address _____

2. Company's Name _____

Name and Title of Contact _____

Project Name _____

Present Address _____

City, State, Zip Code _____

Telephone Number (____) _____ Fax Number (____) _____

Email Address _____

3. Company's Name _____

Name and Title of Contact _____

Project Name _____

Present Address _____

City, State, Zip Code _____

Telephone Number (____) _____ Fax Number (____) _____

Email Address _____

City of Austin, Texas
Section 0800
NON-DISCRIMINATION AND NON-RETALIATION CERTIFICATION

City of Austin, Texas

Equal Employment/Fair Housing Office

To: City of Austin, Texas,

I hereby certify that our firm complies with the Code of the City of Austin, Section 5-4-2 as reiterated below, and agrees:

- (1) Not to engage in any discriminatory employment practice defined in this chapter.
- (2) To take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without discrimination being practiced against them as defined in this chapter, including affirmative action relative to employment, promotion, demotion or transfer, recruitment or recruitment advertising, layoff or termination, rate of pay or other forms of compensation, and selection for training or any other terms, conditions or privileges of employment.
- (3) To post in conspicuous places, available to employees and applicants for employment, notices to be provided by the Equal Employment/Fair Housing Office setting forth the provisions of this chapter.
- (4) To state in all solicitations or advertisements for employees placed by or on behalf of the Contractor, that all qualified applicants will receive consideration for employment without regard to race, creed, color, religion, national origin, sexual orientation, gender identity, disability, sex or age.
- (5) To obtain a written statement from any labor union or labor organization furnishing labor or service to Contractors in which said union or organization has agreed not to engage in any discriminatory employment practices as defined in this chapter and to take affirmative action to implement policies and provisions of this chapter.
- (6) To cooperate fully with City and the Equal Employment/Fair Housing Office in connection with any investigation or conciliation effort of the Equal Employment/Fair Housing Office to ensure that the purpose of the provisions against discriminatory employment practices are being carried out.
- (7) To require of all subcontractors having 15 or more employees who hold any subcontract providing for the expenditure of \$2,000 or more in connection with any contract with the City subject to the terms of this chapter that they do not engage in any discriminatory employment practice as defined in this chapter

For the purposes of this Offer and any resulting Contract, Contractor adopts the provisions of the City's Minimum Standard Non-Discrimination and Non-Retaliation Policy set forth below.

City of Austin
Minimum Standard Non-Discrimination and Non-Retaliation in Employment Policy

As an Equal Employment Opportunity (EEO) employer, the Contractor will conduct its personnel activities in accordance with established federal, state and local EEO laws and regulations.

The Contractor will not discriminate against any applicant or employee based on race, creed, color, national origin, sex, age, religion, veteran status, gender identity, disability, or sexual orientation. This policy covers all aspects of employment, including hiring, placement, upgrading, transfer, demotion, recruitment, recruitment advertising, selection for training and apprenticeship, rates of pay or other forms of compensation, and layoff or termination.

The Contractor agrees to prohibit retaliation, discharge or otherwise discrimination against any employee or applicant for employment who has inquired about, discussed or disclosed their compensation.

Further, employees who experience discrimination, sexual harassment, or another form of harassment should immediately report it to their supervisor. If this is not a suitable avenue for addressing their complaint, employees are advised to contact another member of management or their human resources representative. No employee shall be discriminated against, harassed, intimidated, nor suffer any reprisal as a result of reporting a violation of

this policy. Furthermore, any employee, supervisor, or manager who becomes aware of any such discrimination or harassment should immediately report it to executive management or the human resources office to ensure that such conduct does not continue.

Contractor agrees that to the extent of any inconsistency, omission, or conflict with its current non-discrimination and non-retaliation employment policy, the Contractor has expressly adopted the provisions of the City's Minimum Non-Discrimination Policy contained in Section 5-4-2 of the City Code and set forth above, as the Contractor's Non-Discrimination Policy or as an amendment to such Policy and such provisions are intended to not only supplement the Contractor's policy, but will also supersede the Contractor's policy to the extent of any conflict.

UPON CONTRACT AWARD, THE CONTRACTOR SHALL PROVIDE THE CITY A COPY OF THE CONTRACTOR'S NON-DISCRIMINATION AND NON-RETALIATION POLICIES ON COMPANY LETTERHEAD, WHICH CONFORMS IN FORM, SCOPE, AND CONTENT TO THE CITY'S MINIMUM NON-DISCRIMINATION AND NON-RETALIATION POLICIES, AS SET FORTH HEREIN, **OR** THIS NON-DISCRIMINATION AND NON-RETALIATION POLICY, WHICH HAS BEEN ADOPTED BY THE CONTRACTOR FOR ALL PURPOSES WILL BE CONSIDERED THE CONTRACTOR'S NON-DISCRIMINATION AND NON-RETALIATION POLICY WITHOUT THE REQUIREMENT OF A SEPARATE SUBMITTAL.

Sanctions:

Our firm understands that non-compliance with Chapter 5-4 and the City's Non-Retaliation Policy may result in sanctions, including termination of the contract and suspension or debarment from participation in future City contracts until deemed compliant with the requirements of Chapter 5-4 and the Non-Retaliation Policy.

Term:

The Contractor agrees that this Section 0800 Non-Discrimination and Non-Retaliation Certificate of the Contractor's separate conforming policy, which the Contractor has executed and filed with the City, will remain in force and effect for one year from the date of filing. The Contractor further agrees that, in consideration of the receipt of continued Contract payment, the Contractor's Non-Discrimination and Non-Retaliation Policy will automatically renew from year-to-year for the term of the underlying Contract.

Dated this _____ day of _____, _____

CONTRACTOR	_____
Authorized Signature	_____
Title	_____

Section 0815: Living Wages Contractor Certification

Pursuant to the Living Wages provision (reference Section 0400, Supplemental Purchase Provisions) the Contractor is required to pay to all employees of the Prime Contractor and all tiers of subcontractors directly assigned to this City contract a minimum Living Wage equal to or greater than \$15.00 per hour.

- (1) The below listed individuals are all known employees of the Prime Contractor and its subcontractors who are directly assigned to this contract, and all are compensated at wage rates equal to or greater than \$15.00 per hour:

Employee Name	Employer	Prime or Sub	Your Normal Rate	Employee Job Title

- (2) All future employees of both the Prime Contractor and all tiers of subcontractors directly assigned to this Contract will be paid a minimum Living Wage equal to or greater than \$15.00 per hour.
- (3) Our firm will not retaliate against any employee of either the Prime Contractor or any tier of subcontractors claiming non-compliance with the Living Wage provision.

A Prime Contractor or subcontractor that violates this Living Wage provision shall pay each of its affected employees the amount of the deficiency for each day the violation continues. Willful or repeated violations of the provision by either the Prime Contractor or any tier of subcontractor, or fraudulent statements made on this certification, may result in termination of this Contract for Cause, subject the violating firm to possible suspension or debarment, or result in legal action.

I hereby certify that all the listed employees of both the Prime Contractor and all tiers of subcontractors who are directly assigned to this contract are paid a minimum Living Wage equal to or greater than \$15.00 per hour.

Contractor's Name: _____

Signature of Officer
or Authorized
Representative: _____

Date: _____

Printed Name: _____

Title _____

Section 0835: Non-Resident Bidder Provisions

Company Name _____

- A. Bidder must answer the following questions in accordance with Vernon's Texas Statutes and Codes Annotated Government Code 2252.002, as amended:

Is the Bidder that is making and submitting this Bid a "Resident Bidder" or a "non-resident Bidder"?

Answer: _____

- (1) Texas Resident Bidder- A Bidder whose principle place of business is in Texas and includes a Contractor whose ultimate parent company or majority owner has its principal place of business in Texas.
(2) Nonresident Bidder- A Bidder who is not a Texas Resident Bidder.

- B. If the Bidder is a "Nonresident Bidder" does the state, in which the Nonresident Bidder's principal place of business is located, have a law requiring a Nonresident Bidder of that state to bid a certain amount or percentage under the Bid of a Resident Bidder of that state in order for the nonresident Bidder of that state to be awarded a Contract on such bid in said state?

Answer: _____ Which State: _____

- C. If the answer to Question B is "yes", then what amount or percentage must a Texas Resident Bidder bid under the bid price of a Resident Bidder of that state in order to be awarded a Contract on such bid in said state?

Answer: _____

Section 0840, Service-Disabled Veteran Business Enterprise Preference

Offeror Name

Additional Solicitation Instructions.

- ☐ By checking this box, Offeror states they are NOT a certified Service-Disabled Veteran Business Enterprise seeking to claim preference points under the City of Austin's SDVBE Program.
- Offerors seeking to claim the Service-Disabled Veteran Business Enterprise (SDVBE) preference shall be certified **under one of the two following scenarios**. Offerors shall check one of the following boxes, input the data in the applicable table below and include this completed form in their Proposal.
 - ☐ **HUB/SV**. Offeror is certified as a Service-Disabled Veteran (SV) Historically Underutilized Business (HUB) by the Texas State Comptroller of Public Accounts.

Texas State HUB/SV Certification	
13-Digit Vendor ID (VID)	
HUB/SV Issue Date	
HUB/SV Expiration Date	

- ☐ **HUB/OTHER + Federal SDVOSB**. Offeror is certified by the Texas State Comptroller of Public Accounts as a Historically Underutilized Business in a HUB Eligibility Category other than Service-Disabled Veteran (SV) AND is verified by the US Veterans Administration as a Service-Disabled Veteran-Owned Small Business (SDVOSB). **Texas HUB Eligibility Categories:** HUB/BL (Black), HUB/AS (Asian), HUB/HI (Hispanic), HUB/AI (Native American), or HUB/WO (Women Owned).

Texas State HUB/OTHER Certification	
13-Digit Vendor ID (VID)	
HUB Eligibility Category	
HUB Issue Date	
HUB Expiration Date	

Federal SDVOSB Verification	
9-Digit DUNS	
SDVOSB Issue Date	
SDVOSB Expiration Date	

- Offeror Identity**. The Offeror submitting the Proposal shall be the same entity that is certified by the Texas State Comptroller of Public Accounts, AND if applicable as verified by the US Veterans Administration.
- Certification Status**. Offeror's certification(s) must be active on or before the Solicitation's due date for Proposals and shall not expire prior to the award and execution of any resulting contract.
- Confirmation of Certification(s)**. Upon receipt of this completed form, the City will confirm the Offeror's certification(s): State: <https://mycpa.cpa.state.tx.us/tpasscmblsearch>. Federal: <https://www.vip.vetbiz.gov/>. The City will direct any questions concerning an Offeror's State or Federal certification status to the Offeror's contact person as designated on the Offer Form of their Proposal.
- Misrepresentation**. If the City determines that the Offeror requesting this preference is not certified by the State or Federal government if applicable, the Offeror will not receive the preference points. If the City determines that this misrepresentation was intentional, the City may also find the Offeror not responsible and may report the Offeror to the Texas State Comptroller of Public Accounts or if applicable to the US Veterans Administration. If the misrepresentation is discovered after contract award, the City reserves the right to void the contract.

**MINORITY- AND WOMEN-OWNED BUSINESS ENTERPRISE (MBE/WBE)
PROCUREMENT PROGRAM
Subcontracting/Sub-Consulting ("Subcontractor") Utilization Plan**

SOLICITATION NUMBER: RFP 5800 RJZ3005
SOLICITATION TITLE: Citywide Training For Implicit Bias.

Subcontracting/Sub-Consulting Utilization Form

In accordance with the City of Austin's Minority and Women-Owned Business Enterprises (M/WBE) Procurement Program (Program), Chapters 2-9A/B/C/D of the City Code and M/WBE Program Rules, this Solicitation was reviewed by the Small and Minority Business Resources Department (SMBR) to determine if M/WBE Subcontractor/Sub-Consultant ("Subcontractor") Goals could be applied. Due to insufficient subcontracting/subconsultant opportunities and/or insufficient availability of M/WBE certified firms, SMBR has assigned no subcontracting goals for this Solicitation. However, Offerors who choose to use Subcontractors must comply with the City's M/WBE Procurement Program as described below. Additionally, if the Contractor seeks to add Subcontractors after the Contract is awarded, the Program requirements shall apply to any Contract(s) resulting from this Solicitation.

Instructions:

- a.) Offerors who do not intend to use Subcontractors shall check the "NO" box and follow the corresponding instructions.
b.) Offerors who intend to use Subcontractors shall check the applicable "YES" box and follow the instructions. **Offers that do not include the following required documents shall be deemed non-compliant or nonresponsive as applicable, and the Offeror's submission may not be considered for award.**

☐ **NO, I DO NOT intend to use Subcontractors/Sub-consultants.**

Instructions: Offerors that do not intend to use Subcontractors shall complete and sign this form below (Subcontracting/Sub-Consulting ("Subcontractor") Utilization Form) and include it with their sealed Offer.

☒ **X YES, I DO intend to use Subcontractors /Sub-consultants.**

Instructions: Offerors that do intend to use Subcontractors shall complete and sign this form below (Subcontracting/Sub-Consulting ("Subcontractor") Utilization Form), and follow the additional Instructions in the (Subcontracting/Sub-Consulting ("Subcontractor") Utilization Plan). Contact SMBR if there are any questions about submitting these forms.

Offeror Information			
Company Name	International Training Consortium, Inc		
City Vendor ID Code	V00000961108		
Physical Address	23749 Rolling Fork Way		
City, State Zip	Gaithersburg MD 20882		
Phone Number	<input type="checkbox"/> 301-428-0670 <input type="checkbox"/>	<input type="checkbox"/>	Email Address <input checked="" type="checkbox"/> skip@international-training.com
Is the Offeror City of Austin M/WBE certified?	<div style="display: flex; align-items: center;"> <div style="margin-right: 20px;"> X No </div> <div> Indicate one: MBE WBE MBE/WBE Joint Venture </div> </div> <div style="margin-top: 10px;">YES</div>		

**MINORITY- AND WOMEN-OWNED BUSINESS ENTERPRISE (MBE/WBE)
PROCUREMENT PROGRAM
Subcontracting/Sub-Consulting ("Subcontractor") Utilization Plan**

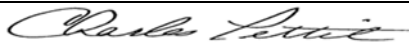
SOLICITATION NUMBER: RFP 5800 RJZ3005

SOLICITATION TITLE: Citywide Training For Implicit Bias.

Offeror Certification: I understand that even though SMBR did not assign subcontract goals to this Solicitation, I will comply with the City's M/WBE Procurement Program if I intend to include Subcontractors in my Offer. I further agree that this completed **Subcontracting/Sub-Consulting Utilization Form**, and if applicable my completed **Subcontracting/Sub-Consulting Utilization Plan**, shall become a part of any Contract I may be awarded as the result of this Solicitation. Further, if I am awarded a Contract and I am not using Subcontractor(s) but later intend to add Subcontractor(s), before the Subcontractor(s) is hired or begins work, I will comply with the City's M/WBE Procurement Program and submit the **Request For Change** form to add any Subcontractor(s) to the Project Manager or the Contract Manager for prior authorization by the City and perform Good Faith Efforts (GFE), if applicable. I understand that, if a Subcontractor is not listed in my **Subcontracting/Sub-Consulting Utilization Plan**, it is a violation of the City's M/WBE Procurement Program for me to hire the Subcontractor or allow the Subcontractor to begin work, unless I first obtain City approval of my **Request for Change** form. I understand that, if a Subcontractor is not listed in my **Subcontracting/Sub-Consulting Utilization Plan**, it is a violation of the City's M/WBE Procurement Program for me to hire the Subcontractor or allow the Subcontractor to begin work, unless I first obtain City approval of my **Request for Change** form.

Skip Petitt President

Name and Title of Authorized Representative (Print or Type)



Signature/Date

June 4, 2019

Section 0905: SUBCONTRACTING/SUB-CONSULTING UTILIZATION PLAN

INSTRUCTIONS: Offerors who DO intend to use Subcontractors may utilize M/WBE Subcontractor(s) or perform Good Faith efforts when retaining Non-certified Subcontractor(s). Offerors must determine which type of Subcontractor(s) they are anticipating to use (CERTIFIED OR NON-CERTIFIED), check the box of their applicable decision, and comply with the additional instructions associated with that particular selection.

- ☒ **X** I intend to use City of Austin CERTIFIED M/WBE Subcontractor/Sub-consultant(s).

Instructions: Offerors may use Subcontractor(s) that ARE City of Austin certified M/WBE firms. Offerors shall contact SMBR (512- 974-7600 or SMBRComplianceDocuments@austintexas.gov) to confirm if the Offeror's intended Subcontractor(s) are City of Austin certified M/WBE and if these firm(s) are certified to provide the goods and services the Offeror intends to subcontract. If the Offeror's Subcontractor(s) are current valid certified City of Austin M/WBE firms, the Offeror shall insert the name(s) of their Subcontractor(s) into the table below and must include the following documents in their sealed Offer:

- Subcontracting/Sub-Consulting Utilization Form (completed and signed)
- Subcontracting/Sub-Consulting Utilization Plan (completed)

- ☐ I intend to use NON-CERTIFIED Subcontractor/Sub-Consultant(s) after performing Good Faith Efforts.

Instructions: Offerors may use Subcontractors that ARE NOT City of Austin certified M/WBE firms ONLY after Offerors have first demonstrated Good Faith Efforts to provide subcontracting opportunities to City of Austin M/WBE firms.

STEP ONE: Contact SMBR for an availability list for the scope(s) of work you wish to subcontract;

STEP TWO: Perform Good Faith Efforts (Check List provided below);

STEP THREE: Offerors shall insert the name(s) of their certified or non-certified Subcontractor(s) into the table below and must include the following documents in their sealed Offer:

- Subcontracting/Sub-Consulting Utilization Form (completed and signed)
- Subcontracting/Sub-Consulting Utilization Plan (completed)
- All required documentation demonstrating the Offeror's performance of Good Faith Efforts (see Check List below)

GOOD FAITH EFFORTS CHECK LIST –

When using NON-CERTIFIED Subcontractor/Sub-consultants(s), ALL of the following CHECK BOXES MUST be completed in order to meet and comply with the Good Faith Effort requirements and all documentation must be included in your sealed Offer.

Documentation CANNOT be added or changed after submission of the bid.

MINORITY- AND WOMEN-OWNED BUSINESS ENTERPRISE (MBE/WBE)

PROCUREMENT PROGRAM

Subcontracting/Sub-Consulting ("Subcontractor") Utilization Plan

SOLICITATION NUMBER: RFP 5800 RJZ3005

SOLICITATION TITLE: Citywide Training For Implicit Bias.

- ☐ Contact SMBR. Offerors shall contact SMBR (512-974-7600 or SMBRComplianceDocuments@austintexas.gov) to obtain a list of City of Austin certified M/WBE firms that are certified to provide the goods and services the Offeror intends to subcontract out. (Availability List). Offerors shall document their contact(s) with SMBR in the "SMBR Contact Information" table on the following page.

- ☐ Contact M/WBE firms. Offerors shall contact all of the M/WBE firms on the Availability List with a Significant Local Business Presence which is the **Austin Metropolitan Statistical Area**, to provide information on the proposed goods and services proposed to be subcontracted and give the Subcontractor the opportunity to respond on their interest to bid on the proposed scope of work. When making the contacts, Offerors shall use at least two (2) of the following communication methods: email, fax, US mail or phone. Offerors shall give the contacted M/WBE firms at least seven days to respond with their interest. Offerors shall document all evidence of their contact(s) including: emails, fax confirmations, proof of mail delivery, and/or phone logs. These documents shall show the date(s) of contact, company contacted, phone number, and contact person.

MINORITY- AND WOMEN-OWNED BUSINESS ENTERPRISE (MBE/WBE) PROCUREMENT PROGRAM
Subcontracting/Sub-Consulting ("Subcontractor") Utilization Plan

SOLICITATION NUMBER: RFP 5800 RJZ3005

SOLICITATION TITLE: Citywide Training For Implicit Bias.

City of Austin Certified		MBE <input checked="" type="checkbox"/> WBE <input type="checkbox"/> Ethnic/Gender Code: <input type="checkbox"/>	NON-CERTIFIED <input type="checkbox"/>
Company Name			
Vendor ID Code		VS0000024011	
Contact Person		Patricia Porter Phone Number: 210-880-4440	
Additional Contact Info		Fax Number: E-mail: pmporter@conflictconnections.com	
Amount of Subcontract		5-15% *Subject to the findings in the Need's Assessment	
List commodity codes & description of services		pmporter@conflictconnections.com	
91838, 92435		Conflict Connections, Inc. helps large family businesses, organizations, federal agencies, and individuals throughout North America. Our interventions reduce the anxiety, distress, and litigation caused by destructive conflict, conflict avoidance, aggressive behavior and leaders who bully. Our Executive Coaching specializing in abrasive and conflict avoidance as well as workplace and EEO mediation, and team facilitation services decrease conflict and systemic team problems, address change and transition challenges, enhance team performance, boost staff morale, improve communication, and build leader competency in managing conflict and constructive behavioral responses.	
Justification for not utilizing a certified MBE/WBE			

Subcontractor/Sub-consultant			
City of Austin Certified	MBE <input type="checkbox"/> WBE <input type="checkbox"/> Ethnic/Gender Code: <input type="checkbox"/>	X NON-CERTIFIED <input type="checkbox"/>	
Company Name	Fundamental Advisory, LLC		
Vendor ID Code	V00000961815		
Contact Person	Mindy Gulati Phone Number: 512-409-5027		
Additional Contact Info	Fax Number: <input type="checkbox"/> <input type="checkbox"/>	E-mail: mindy@fundamentaladvisory.com	
Amount of Subcontract	15 - 20% *Subject to the findings in the Need's Assessment		
List commodity codes & description of services	91838, 92435 Implicit Bias Consulting		
Justification for not utilizing a certified MBE/WBE	See Below		

SMBR Contact Information			
SMBR Contact Name	Contact Date	Means of Contact	Reason for Contact
Rachelle Delouis	June 3, 2019	Phone 512-974-1295 OR Email <input type="checkbox"/>	Explain MBE/WBE Requirements and Listing of City of Austin Certified Vendors

☐

Ms. Mindy Gulati brings a unique insight into the City of Austin's needs that is unavailable from MBE/WBE certified Firms. She is a sole owner of Fundamental Advisory, which is a single-member LLC and is in the process of filing for her WBE certification. Ms. Gulati serves on the Mayor's Task Force on Institutional Racism and Systemic Inequities. She authored key sections of the finance and industry report and has stayed engaged and active with the task force. She has the time available to serve on this project and ensure it's success.

She knows the City of Austin and is dedicated to ensuring the real issues of racial inequity that face the city are confronted in these implicit bias conversations; they must be authentically connected to the city and people living here, and they must have an ethical core guiding them – not just bottom line figures. She is aware that there are

MINORITY- AND WOMEN-OWNED BUSINESS ENTERPRISE (MBE/WBE) PROCUREMENT PROGRAM
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SOLICITATION TITLE: Citywide Training For Implicit Bias.

community groups serving your communities of color that are speaking out about their experiences – She knows these voices must be understood.

She knows the are women of color in Austin writing publicly about their experiences in Austin – they must be heard. She understands that Austin faces issues of gentrification, loss of many diverse neighborhoods, the confederate naming issues that were encountered last year, the mail bombings that struck fear in the city, particularly in the communities of color they impacted, continued concern over access to justice in our court system, police accountability, and access to job and wealth generation in historically underserved communities. These issues weigh heavy and Mindy will use them to inform how our implicit bias conversations will be crafted and conducted.

Her unique strengths also stem from how much the city of Austin means to her personally. She is raising multi-ethnic children in Austin. Issues of racial equity and understanding implicit bias are front and center in her life. She has a lot riding on how the city address these issues.

With this backdrop, when we looked for a local contractor to lead our team in this effort to support the City of Austin in your program for implicit bias and cultural competency training, we were unable to find any WBE or MBE to play this prominent role in leading this effort to ensure the City gets the best, most effective set of experts.

Ms. Gulati is in a unique position to guide and craft an innovative implicit bias program that will be informed by her role with the Mayor's Task Force on Institutional Racism and Systemic Inequities, her expertise on Implicit Bias, her deep love for and connections to the city, the people who live there, and the local groups that push for equity and racial justice. She is committed to this project, to this city, and to seeing through the recommendations of the task force that she committed to serve years ago.

EXHIBIT 1

RFP# 5800 RJZ3005

IMPLICIT BIAS AND CULTURAL COMPETENCY TRAINING AND DEVELOPMENT REVISED BEST AND FINAL

City of Austin
Purchasing Office
P.O. Box 1088
Austin, 78767-8845

October 28, 2019

International Training Consortium, Inc.

23749 Rolling Fork Way

Gaithersburg, MD 20882

Phone: 301-428-0670/Cell: 301-928-5103

FAX: 301-972-3906

Email: skip@international-training.com

SDVOSB VA-Verified VCE/VETS

DUNS: 88-4653403/CAGE Code: 080Q0

INTERNATIONAL TRAINING CONSORTIUM, INC.

October 28, 2019

Ricardo Zavala, CTCM, MPA
Procurement Specialist III
City of Austin Purchasing Office

RE: Implicit Bias and Cultural Competency Training and Development Request for Proposal #5800 RJZ3005 – Revised Best and Final Offer (BAFO)

Dear Mr. Zavala:

International Training Consortium, Incorporated, (ITCI) is pleased to submit our Revised Best and Final Offers (BAFO) to the Implicit Bias and Cultural Competency Training and Development (Implicit Bias) Request for Proposal #5800 RJZ3005.

If you require any further clarification as you continue your evaluation process, please do not hesitate to contact us. We look forward to working with the City of Austin.

Thank you,

A handwritten signature in black ink, reading "Charles Pettit". The signature is written in a cursive, flowing style.

Charles "Skip" Pettit
President, ITC, Inc.
SDVOSB

Financial Proposal ITC -City of Austin Citywide Implicit Bias Training							
Financial Proposal ITC -City of Austin Citywide Implicit Bias Training 2nd BAFO Request	Number of Hours	Rate		Cost	Cost/Overhead/Profit	BAFO Discount 3.75%	2nd BAFO Pricing
Initial Assessment / Including Overview Assessment of development materials	250	\$ 296.88	=	\$74,220.00	\$96,486.00	3.75%	\$92,867.78
Design Training to Executive and Manager Populations	360	\$125.00	=	\$45,000.00	\$58,500.00	3.75%	\$56,306.25
Deliver Training Executive and Manager Populations 36 classes Max 25 per class and 2 Facilitators	864	\$255.00	=	\$220,320.00	\$286,416.00	3.75%	\$275,675.40
Post Training Assessments of both trial and regular training	60	\$260.83	=	\$15,649.80	\$20,344.74	3.75%	\$19,581.81
Design Individual Contributor and Train the Trainer courses	175	\$125.00	=	\$21,875.00	\$28,437.50	3.75%	\$27,371.09
Deliver Training for Train the Trainer 8 Classes 15 per Class 2 Facilitators	384	\$225.00	=	\$86,400.00	\$112,320.00	3.75%	\$108,108.00
Post Training Assessment of Train-the-Trainer classes with HR	80	\$229.00	=	\$18,320.00	\$23,816.00	3.75%	\$22,922.90
Update design for supervisors and individual contributors	50	\$125.00	=	\$6,250.00	\$8,125.00	3.75%	\$7,820.31
Review and updated design of supervisors and individual contributors course assess with HR	16	\$246.88	=	\$3,950.08	\$5,135.10	3.75%	\$4,942.54
Plan rollout of the material/training for CLPs to present to City employees with HR	40	\$260.83	=	\$10,433.20	\$13,563.16	3.75%	\$13,054.54
Monitor Each CLP a minimum of 10% of presentations (40 participants per class with 2 CLP Instructors)	156	\$150.00	=	\$23,400.00	\$30,420.00	3.75%	\$29,279.25
Design 1-hour facilitated conversation tool for supervisors	30	\$125.00	=	\$3,750.00	\$4,875.00	3.75%	\$4,692.19
Design Continual Assessment Tool	40	\$229.00	=	\$9,160.00	\$11,908.00	3.75%	\$11,461.45
Glossary of Terms	8	\$125.00	=	\$1,000.00	\$1,300.00	3.75%	\$1,251.25
Available for curriculum adjustments during initial rollout up to 15 months after launch/8 hours per month	120	\$150.00	=	\$18,000.00	\$23,400.00	3.75%	\$22,522.50
Closeout of contract to include final reports/ Including Final Presentation	60	\$256.67	=	\$15,400.20	\$20,020.26	3.75%	\$19,269.50
			=	\$0.00	\$0.00	3.75%	
			=	\$0.00	\$0.00	3.75%	
			=	\$0.00	\$0.00	3.75%	
			=	\$0.00	\$0.00	3.75%	
			=	\$0.00	\$0.00	3.75%	
	2,693		=	\$0.00	\$0.00	3.75%	
Total Bidder Cost/ total Cost plus Cost/Overhead/Profit				\$573,128.28	\$745,066.76		\$717,126.76
Materials/Workbooks, Travel and Misc. 2nd BAFO Plus 5 additional sets of Materials per Class. 5 additional Students X 36 Classes @ \$50 each = \$9000					\$75,000.00		\$84,000.00
				Total Price	\$820,066.76	2nd BAFO Total Price	\$801,126.76

NOTE: Hourly costs for ITCI Team Members are based on the maximum rate that MAY be applied to work performed and may not represent actual rate per assignment. Pricing for each task is based on a blended rate.



RFP# 5800 RJZ3005

**IMPLICIT BIAS AND
CULTURAL COMPETENCY
TRAINING AND
DEVELOPMENT
CLARIFICATIONS**

**City of Austin
Purchasing Office
P.O. Box 1088
Austin, 78767-8845**

September 3, 2019

International Training Consortium, Inc.

**23749 Rolling Fork Way
Gaithersburg, MD 20882
Phone: 301-428-0670/Cell: 301-928-5103
FAX: 301-972-3906
Email: skip@international-training.com
SDVOSB VA-Verified VCE/VETS
DUNS: 88-4653403/CAGE Code: 080Q0**

INTERNATIONAL TRAINING CONSORTIUM, INC.

September 3, 2019

Ricardo Zavala, CTCM, MPA
Procurement Specialist III
City of Austin Purchasing Office

RE: Implicit Bias and Cultural Competency Training and Development Request for Proposal #5800 RJZ3005 - Clarifications

Dear Mr. Zavala:

International Training Consortium, Incorporated, (ITCI) is pleased to submit our clarification responses to the Implicit Bias and Cultural Competency Training and Development (Implicit Bias) Request for Proposal #5800 RJZ3005.

If you require any further clarification as you continue your evaluation process, please do not hesitate to contact us. We look forward to working with the City of Austin.

Thank you,

A handwritten signature in black ink, reading "Charles Pettit". The signature is fluid and cursive, with a large initial "C" and a stylized "P".

Charles "Skip" Pettit
President, ITC, Inc.
SDVOSB

MEASUREMENT TOOL OR RESOURCE

The City scope of work states that a survey will be conducted using a tool developed to measure the City's current culture related to diversity, inclusion, and implicit bias.

- ***Is the tool you are planning to use a tool that is currently available for purchase and in use by other entities?***

We offer two options for this “tool” to measure the City's current culture related to diversity, inclusion, and implicit bias as a foundation for developing your program. Once a contract is awarded, ITCI will work closely with the City to decide on which tool will be most appropriate for the City's use.

Proprietary Tool

ITCI will utilize an enterprise survey software and tool (such as SurveyMonkey, Qualtrics, or other survey platform) that can be purchased for access and use for the term of the contract. The survey platform and tool will be user-friendly, has the ability to be highly customizable in its use and the questions to be asked, accurate analytics, highly confidential and secure, and is compatibility with a variety of IT platforms. ITCI will be your administrator to ensure confidentiality and proper use. We will develop customized questions in close collaboration with the City of Austin (City) that will accurately measure your current culture and will be used to measure your culture throughout the contract period to ascertain the level of effectiveness of the program.

OR

Intercultural Development Inventory® (IDI®)

ITCI will utilize the Intercultural Development Inventory® (IDI®), the premier, cross-cultural assessment of intercultural competence that is used by thousands of individuals and organizations to build intercultural competence to achieve diversity and inclusion goals and outcomes. The IDI® is a valid and reliable assessment of an organization's intercultural competence. It has been developed and tested using rigorous cross-culturally validated psychometric protocols with over 220,000 respondents from a wide range of cultural groups and countries. By assessing how the individual employees' capability to shift perspective and adapt behavior to cultural difference and commonality is reflected in their answers, we will create an aggregate of how competently the organization deals with intercultural differences. In this assessment, intercultural competence reflects the degree to which cultural differences and commonalities in values, expectations, beliefs, and practices are effectively bridged, an inclusive environment achieved, and specific differences that exist in the City are addressed from a mutual adaption perspective. Detailed group and subgroup reports can be produced to provide the group and organization a comprehensive picture of intercultural competence. ITCI Team Member LaPonda Fitchpatrick is a Certified Qualified Administrator for this assessment tool. It must be noted that the ability to customize this assessment tool is very limited.



- ***How will the tool measure the current culture related to diversity, inclusion, and implicit bias?***

The ITCI customized tool will be based on the *Global Diversity & Inclusion Benchmarks: Standards for Organizations Around the World* (GDIB). ITCI Team Member LaPonda Fitchpatrick is an authorized user of this tool by the Centre for Global Inclusion. It must be noted here that although ITCI will utilize a centralized tool to create the aggregate picture of the City's current culture, our current culture assessment will incorporate our findings from other information that we glean from our initial City assessment to include employee focus groups, onsite visit, 1-on-1 stakeholder interviews, meetings with affinity groups, meetings with Human Resources, and other research, etc.

The results of our assessment and the aggregate answers provided by the population that will take the initial culture survey, will be synthesized into a report for the City. The assessment and survey results will be measured against the GDIB international benchmarks for organizational standards of performance. These benchmarks will include, but may not be limited to, knowledge of the City's DE&I vision, strategy, and business case; leadership and accountability; DE&I structure and implementation; recruitment, retention, development and advancement; benefits, work-life integration, and flexibility; job design, classification, and compensation; DE&I learning and education; assessment, measurement, and research; communications around DE&I; connecting DE&I and sustainability (belonging and culture); community/government relations and social responsibility; products and services development around DE&I; marketing and customer service; and supplier diversity. As we assess the City, additional benchmarking categories may be included that are specific to the City and its employees.



If the Intercultural Development Inventory® (IDI®) is chosen, the IDI® has been psychometrically tested and found to possess strong validity and reliability across diverse cultural groups to assess their level of cultural competence and has been rigorously tested for cross-cultural generalizability. The IDI® will give us a baseline of how the City as an aggregate of its employees navigate cultural differences and will provide a basis for our program development. Benchmarking occurs via their internal database of over thousands of responses. We then evaluate these responses, incorporate them with our additional assessments and provide an accurate picture of the City's environment as it relates to DE&I against the benchmarks that are identified above.

- ***What will the current culture be measured against?***

As noted above, the current City culture will be measured against the *Global Diversity & Inclusion Benchmarks: Standards for Organizations Around the World* (GDIB). The GDIB will allow ITCI to explore with the City the depth, breadth, and integrated scope of your current culture as it surrounds DE&I practices and unconscious bias.

We will also measure the information we gather against other publicly available data from organizations that are similarly situated in size and scope such as the Federal Employee Viewpoint Survey (FEVS)¹. A comprehensive report of our findings in the aggregate and through individual components of assessment will be provided to the City.

- ***How will the tool be provided to the City to use in future reviews to gauge progress?***

If the City chooses a customized assessment tool that will be managed utilizing an enterprise survey software and tool (such as SurveyMonkey, Qualtrics, or other enterprise survey platform), the survey can be administered as often as the City likes to gauge progress. Access will be assigned confidentially to selected members of the City based on their identified levels of need. It is critical that the information that employees provide remain confidential and they must be assured that their answers will not be readily identifiable to them specifically. The information including the questions, aggregate results, general demographics, and analytical reports will be downloaded and provided to the City in a searchable format as well.

We recommend that the survey on this platform be taken at least four times over a 60-month period as a gauge of the effectiveness of the City's ongoing DE&I and Unconscious Bias reduction strategies. First, as an initial baseline for developing the overall program; 12 months after the initial training; and then 36 months and 60 months. This will help the City gauge progress towards their DE&I goals. The platform will require an annual fee with unlimited surveys and survey respondents. (It can be taken more often if the City prefers.) To ensure confidentiality, we recommend the City carefully limit the number of people that have access to individual responses.

OR

If the City chooses the IDI®, it has its own enterprise platform. The survey can be administered as often as the City likes to gauge progress however, individual fees will be assessed for each person taking the survey. Additionally, a Qualified Administrator must provide oversight of the program, administer it and provide the feedback. We recommend that the survey on this platform be taken at least four times over 60 months as well. First, as an initial baseline for developing the overall program; 12 months after the initial training; and then 36 months and 60 months. (It can be taken more often if the City prefers.) To ensure confidentiality, we recommend the City carefully limit the number of people that have access to individual responses if enterprise access to the system is requested.

- ***Will the City of Austin be the sole owner of the tool used to measure its organizational culture?***

If the City chooses the enterprise survey software and tool, the City will be the sole owner of the customized assessment tool (survey) created, including all reports, analytics, etc. They will not own the enterprise survey tool and platform itself.

OR

If the City chooses the IDI®, it is a proprietary enterprise platform and questions. Customization is very limited, and the City will not be the sole owner of this tool nor the associated questions asked. It will have ownership of the resulting reports that are generated based on the responses.

¹ The FEVS is a climate survey designed to capture Federal employees' perceptions of organizational policies, practices, and procedures, and subsequent patterns of interactions and behaviors that support organizational performance. Each agency is provided with employee feedback on dimensions critical to organizational performance: conditions for engagement, perceptions of leadership organizational effectiveness, outcomes related to climate (e.g., job satisfaction) and more.

TRAINING DELIVERY

The City scope of work states that customizing training for Executives, Managers, and Train-the-Trainer shall be developed.

- ***What percentage of your curriculum are Diversity and Inclusion, and what percentage is Unconscious Bias?***

As a general guideline:

	Executives	Managers	CLP's Train-the-Trainer	Individual Contributors
Foundational Principles of DE&I	25%	25%	20%	15%
Impact of Unconscious Bias	75%	75%	80%	85%

However, based on our collaboration with the City and our findings in our initial assessments, these percentages will be adjusted to meet the City of Austin's unique needs.

- ***How will the training materials be rolled out at each of the levels?***

In addition to the general messaging we will work with the City to create and distribute to their employees surrounding our overall engagement for this Program, ITCI will create introductory messaging and material for the City to distribute to all employees with a general overview. This messaging should be sent out at least forty-five (45) days in advance of the first implementation of the courses and then bi-weekly reminders that include "Did You Know" information, statistics and other information about DE&I and Unconscious Bias.

We will roll out the training courses in the following sequences with the maximum class sizes:

- 1) Executive Level (Maximum class size of 15)
- 2) Manager Level (Maximum class size of 15)
- 3) City Learning Professionals Train-the-Trainer (Maximum class size of 20)
- 4) Supervisors and Individual Contributors² (Maximum class size of 25)

For City Executives, Managers, and CLPs, we will send out targeted pre-class readings applicable to each level of employee at least thirty (30) days before their course is scheduled to begin. The workbooks themselves will be provided to each participant on the day of the training unless the City would like them distributed sooner.

- ***How will retained knowledge and behavior/attitude change be measured at the end of the training?***

ITCI will develop pre- and post-training assessment instruments (tests) and associated question and answer banks that will measure the level of pre- and post-training knowledge, information retention and skill mastery to be given to participants at the beginning and end of each training session. ITCI will administer these tests for each course ITCI facilitates to the executives, managers and City Learning Professionals (CLPs).

² This training will be conducted by the CLPs. As required in the RFP, ITCI will assist the City in developing a plan to roll out this training to the rest of the City employee population.

The CLPs will administer the pre- and post-tests developed by ITCI after each Supervisor and Individual Contributor course they facilitate. ITCI will provide the associated question and answer banks and instruct the CLPs how to create, administer and synthesize the tests for their courses. ITCI facilitators will be available to assist with this process through our recommended auditing of at least 10% of the CLP course instruction to ensure they are conducting the course in the manner in which they were taught to facilitate it. CLPs can contact the individual ITCI facilitator(s) for guidance and further instruction as required.

Further, within 12 months of an employee participating in the training courses, ITCI in cooperation with the City will conduct a computer-based Post Training Impact survey to ascertain the level of retention of the core principles that were taught and how the workplace has changed or remained the same. We will also ask employees to provide information on an encounter where they believe the courses attended assisted them in a potential challenging situation. This will provide the City with a reference point for the efficacy of the training provided. This tool will be made available for continual use by the City

- ***If utilizing eLearning modules, how will these be integrated into the curriculum?***

Although we did not include eLearning modules as a part of our initial proposal given that it was not a requirement. However, ITCI will work with the City to create eLearning modules if desired as a part of the contract awarding process.

- ***How much ongoing support will be provided to the City of Austin once the formal training portion has ended?***

The hallmark of the ITCI Team is the availability of our ongoing support and access to our team of experts. ITCI will be available to the City well after the training portion of this engagement has ended to answer your questions and provide information and guidance as you continue your journey in support of your DE&I strategies.

ITCI knows that DE&I and Unconscious Bias training must be ongoing and reinforced over time; a one-time training is not enough to change behavior and inculcate DE&I and Unconscious Bias strategy throughout the City. ITCI will provide the City at NO EXTRA EXPENSE, on-going micro-learning curriculum and opportunities to support and expand the initial DE&I and Implicit Bias training program. This will include access to:

1. Blogs that provide examples of best practices of inclusion, communication, respect, bias awareness, and customer service;
2. Suggested books, videos, & current articles - with ideas on how to apply this information to City work practices and employee skill development;
3. A Monthly Conference Call with ITCI Culture Change and Bias experts (targeted to City of Austin Supervisors, Managers, and select others) addressing issues/challenges in implementing culture change and overcoming barriers/resistance to change for 12 months;
4. Periodic ITCI Micro-Lessons expanding on topics addressed in the training.

TRAINING MATERIALS

- ***Who will retain ownership of the training materials at the end of the training rollout?***

Ownership of the complete set of tools and training materials, including instructor guides, participant guides, slide deck/media, eLearning modules (if any) evaluation materials, development materials, and handouts, and links to any video material/slides and the Train-the-Trainer materials will become the property of the City of Austin and

provided in a format that is compatible with the software of the City as requested.³ Any proprietary materials will be labeled as such and use will be limited to ITCI and/or the City with appropriate permissions.

- ***Will the City own the instructor guides, participant guides, slide deck/media, eLearning modules, evaluation materials, development materials, train-the-trainer materials?***

Yes. See above.

- ***In what format will the training materials be turned over to the City?***

The training materials will be turned over to the City in both in PDF and Microsoft formats.

End of Answers

³ Upon delivery of the materials and at the conclusion of the contract, ITCI and its subcontractors, facilitators, trainers, and others involved in the development of the training Program, known and unknown to the City, shall be released by the City of all liability for the use, delivery, distribution, changes, amendments, and such other usage of the material provided to the City unless such use, delivery, distribution, changes, amendments, and such other usage of the material provided is created and managed by ITCI, et.al., for the City.

M/WBE Summary

Although no goals were established for this solicitation, International Training Consortium, Inc. identified the following subcontracting opportunities and were approved by the Small and Minority Business Resource Department.

<u>NON - MBE/WBE TOTAL - PRIME</u>	<u>80.00%</u>
---	----------------------

International Training Consortium, Inc., Gaithersburg, MD

<u>WBE TOTAL – SUBCONTRACTOR</u>	<u>5.00%</u>
---	---------------------

(FW) Conflict Connections, Inc., San Antonio, TX
(Educational training consulting, in-service training for employees)

<u>NON-MBE/WBE – SUBCONTRACTOR</u>	<u>15.00%</u>
---	----------------------

Mindy Joy Gulati / Fundamental Consulting, LLC, Austin, TX
(Education and training consulting)

GOAL DETERMINATION REQUEST FORM

Buyer Name/Phone	Ricardo Zavala/512-974-2988	PM Name/Phone	Rebecca Kennedy x43293
Sponsor/User Dept.	Human Resources Department	Sponsor Name/Phone	Matthew Clites/x43299
Solicitation No	RFP 5800 RJZ3005	Project Name	Citywide Training - Implicit Bias
Contract Amount	\$60,000.00	Ad Date (if applicable)	4/22/19
Procurement Type			
<input type="checkbox"/> AD – CSP <input type="checkbox"/> AD – Design Build Op Maint <input type="checkbox"/> IFB – IDIQ <input checked="" type="checkbox"/> Nonprofessional Services <input type="checkbox"/> Critical Business Need <input type="checkbox"/> Sole Source* <input type="checkbox"/> AD – CM@R <input type="checkbox"/> AD – JOC <input type="checkbox"/> PS – Project Specific <input type="checkbox"/> Commodities/Goods <input type="checkbox"/> Interlocal Agreement <input type="checkbox"/> AD – Design Build <input type="checkbox"/> IFB – Construction <input type="checkbox"/> PS – Rotation List <input type="checkbox"/> Cooperative Agreement <input type="checkbox"/> Ratification			
Provide Project Description**			
Citywide Training - Implicit Bias			
Project History: Was a solicitation previously issued; if so were goals established? Were subcontractors/subconsultants utilized? Include prior Solicitation No.			
No			
List the scopes of work (commodity codes) for this project. (Attach commodity breakdown by percentage; eCAPRIS printout acceptable)			
91838 Education And Training Consulting- 100%			
Ricardo Zavala		4/16/2019	
Buyer Confirmation		Date	

* Sole Source must include Certificate of Exemption

**Project Description not required for Sole Source

FOR SMBR USE ONLY			
Date Received	4/16/2019	Date Assigned to BDC	4/16/2019
In accordance with Chapter2-9(A-D)-19 of the Austin City Code, SMBR makes the following determination:			
<input type="checkbox"/> Goals	% MBE	% WBE	
<input type="checkbox"/> Subgoals	% African American	% Hispanic	
	% Asian/Native American	% WBE	
<input type="checkbox"/> Exempt from MBE/WBE Procurement Program		<input checked="" type="checkbox"/> No Goals	

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This determination is based upon the following:

- | | |
|--|---|
| <input type="checkbox"/> Insufficient availability of M/WBEs | <input type="checkbox"/> No availability of M/WBEs |
| <input type="checkbox"/> Insufficient subcontracting opportunities | <input checked="" type="checkbox"/> No subcontracting opportunities |
| <input type="checkbox"/> Sufficient availability of M/WBEs | <input type="checkbox"/> Sufficient subcontracting opportunities |
| <input type="checkbox"/> Sole Source | <input type="checkbox"/> Other |

If Other was selected, provide reasoning:

MBE/WBE/DBE Availability

THERE ARE 52 M/WBE firms who may bid as prime

Subcontracting Opportunities Identified

No subcontracting opportunities

Rachelle Delouis

SMBR Staff

Signature/ Date

SMBR Director or Designee

Date

Returned to/ Date: