

# SUBMITTAL FORM A – Offeror Information

**PROJECT INFORMATION**

RFP NUMBER: 2021-0200-4627  
 PROJECT NAME: Pandemic Preparedness Plan Phase 2-Personnel Management

**OFFEROR INFORMATION**

Company Name: Tandem Motion LLC  
 Address: 5608 17<sup>th</sup> Ave NW #768  
 Tax ID: 84-1805815  
 Alaska Business License #: 2093327

**CONTACT INFORMATION**

Provide contact information for the individual that can be contacted for clarification regarding this proposal:

Name Cara Griffith  
 Title Founder and Principal  
 Address 5608 17<sup>th</sup> Ave NW #768  
 Email [cara.griffith@tandemmotion.com](mailto:cara.griffith@tandemmotion.com)  
 Telephone 206-237-7324

**ADDENDA ACKNOWLEDGEMENT**

The offeror acknowledges receipt of the following amendments, if any, and has incorporated the requirements of such amendments into their proposal. Failure to identify and sign for all amendments may subject the offeror to disqualification. The offeror must list all amendments (by number), then initial and date to confirm that you have received and incorporated them into your proposal (add more rows as necessary).

Number	Initials & Date	Number	Initials & Date	Number	Initials & Date
1	<i>CD</i> 08/05/2020	4	<i>CD</i> 08/05/2020		
2	<i>CD</i> 08/05/2020				
3	<i>CD</i> 08/05/2020				

## CERTIFICATIONS

No	Criteria	Response*
1	The offeror is presently engaged in the business of providing the services & work required in this RFP.	True
2	The offeror confirms that it has the financial strength to perform and maintain the services required under this RFP.	True
3	The offeror accepts the terms and conditions set out in the RFP and agrees not to restrict the rights of the state.	True
4	The offeror confirms that they can obtain and maintain all necessary insurance as required on this project.	True
5	The offeror certifies that all services provided under this contract by the contractor and all subcontractors shall be performed in the United States.	True
6	The offeror is not established and headquartered or incorporated and headquartered, in a country recognized as Tier 3 in the most recent United States Department of State's Trafficking in Persons Report.	True
7	Offeror complies with the American with Disabilities Act of 1990 and the regulations issued thereunder by the federal government.	True
9	Offeror complies with the Equal Employment Opportunity Act and the regulations issued thereunder by the federal government.	True
10	Offeror complies with the applicable portion of the Federal Civil Rights Act of 1964.	True
11	The offeror can provide (if requested) financial records for the organization for the past three years.	True
12	The offeror has not had any contracts terminated by the State of Alaska (within the past five years).	True
13	The offeror certifies that it is not currently debarred, suspended, proposed for debarment, or declared ineligible for award by any public or federal entity.	True
14	The offeror certifies that they do not have any governmental or regulatory action against their organization that might have a bearing on their ability to provide services to the state.	True
15	The offeror certifies, within the last five years, they have not been convicted or had judgment rendered against them for: fraud, embezzlement, theft, forgery, bribery, falsification or destruction of records, false statements, or tax evasion.	True
16	The offeror does not have any judgments, claims, arbitrations or suits pending/outstanding against your company in which an adverse outcome would be material to the company.	True
17	The offeror is not (now or in the past) been involved in bankruptcy or reorganized proceeding.	True
18	Offeror certifies they comply with the laws of the State of Alaska.	True
19	Offeror confirms their proposal will remain valid and open for at least 90 days.	True

\* Failure to answer or answering "False" may be grounds for disqualification. For any "False" responses, provide clarification (up to 250 word maximum for each "False" clarification) below **(add rows as necessary)**.

Section	Clarification

**CONFLICT OF INTEREST STATEMENT**

Indicate below whether or not the firm or any individuals that will work on the contract has a possible conflict of interest (e.g., currently employed by the State of Alaska or formerly employed by the State of Alaska within the past two years) and, if so, the nature of that conflict. The procurement officer reserves the right to consider a proposal non-responsive and reject it or cancel the award if any interest disclosed from any source could either give the appearance of a conflict or cause speculation as to the objectivity services to be provided by the offeror.

Does the offeror, or any individuals that will work on this contract, have a possible conflict of interest?

<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
---------------------------------------------------------------------

*\* Failure to answer may be grounds for disqualification.*

If “Yes”, please provide additional information regarding the nature of that conflict:

**FEDERAL REQUIREMENTS**


Indicate below all known federal requirements that apply to the proposal, proposal evaluation, or contract:

**ALASKA PREFERENCES**

If you wish to claim any Alaska Preferences, please complete the Alaska Bidder Preference Certification Form that follows the below signature section.

**SIGNATURE**

This proposal must be signed by a company officer empowered to bind the company.

Printed Name   **Cara Griffith**    
Title   **Founder and Principal**    
Date   **August 5, 2020**    
Signature   



# ALASKA BIDDER PREFERENCE CERTIFICATION

## AS 36.30.321(A) / AS 36.30.990(2)

**BUSINESS NAME:** [Click or tap here to enter text.](#)

<b>Alaska Bidder Preference:</b> Do you believe that your firm qualifies for the Alaska Bidder Preference?	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Alaska Veteran Preference:</b> Do you believe that your firm qualifies for the Alaska Veteran Preference?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Please list any additional Alaska Preferences below that you believe your firm qualifies for.	
<b>1.</b>	<b>2.</b>
<b>3.</b>	<b>4.</b>
<b>5.</b>	<b>6.</b>

To qualify for and claim the Alaska Bidder Preference you must answer **YES** to all questions below in the Alaska Bidder Preference Questions section. To qualify for and claim the Alaska Veteran Preference, you must answer **YES** to these questions as well as answer **YES** to all the questions in the Alaska Veteran Preference section. A signed copy of this form must be included with your bid or proposal no later than the deadline set for receipt of bids or proposals.

If you are submitting a bid or proposal as a **JOINT VENTURE**, all members of the joint venture must complete and submit this form before the deadline set for receipt of bids or proposals. [AS 36.30.990\(2\)\(E\)](#)

**If the procuring agency is unable to verify a response, the preference may not be applied.** Knowingly or intentionally making false or misleading statements on this form, whether it succeeds in deceiving or misleading, constitutes misrepresentation per [AS 36.30.687](#) and may result in criminal penalties.

**Alaska Bidder Preference Questions:**

1) Does your business hold a current Alaska business license per [AS 36.30.990\(2\)\(A\)](#)?  
 YES       NO

If YES, enter your current **Alaska business license number:** [Click or tap here to enter text.](#)

2) Is your business submitting a bid or proposal under the name appearing on the Alaska business license noted in **Question 1** per [AS 36.30.990\(2\)\(B\)](#)?  
 YES       NO

3) Has your business maintained a **place of business** within the state **staffed by the bidder or offeror** or an employee of the bidder or offeror for a period of six months immediately preceding the date of the bid or proposal per [AS 36.30.990\(2\)\(C\)](#)?  
 YES       NO

If YES, please complete the following information:

**A. Place of Business**

Street Address: [Click or tap here to enter text.](#)  
 City: [Click or tap here to enter text.](#)  
 ZIP: [Click or tap here to enter text.](#)

“**Place of business**” is defined as a location at which normal business activities are conducted, services are rendered, or goods are made, stored, or processed; a post office box, mail drop, telephone, or answering service does not, by itself, constitute a place of business per [2 AAC 12.990\(b\)\(3\)](#).

Do you certify that the **Place of Business** described in **Question 3A** meets this definition?

**YES**       **NO**

B. The bidder or offeror, or at least one employee of the bidder or offeror, must be a resident of the state under [AS 16.05.415\(a\)](#) per [2 AAC 12.990\(b\)\(7\)](#).

1) Do you certify that the bidder or offeror OR at least one employee of the bidder or offeror is physically present in the state with the intent to remain in Alaska indefinitely and to make a home in the state per [AS 16.05.415\(a\)\(1\)](#)?

**YES**       **NO**

2) Do you certify that that the resident(s) used to meet this requirement has maintained their domicile in Alaska for the 12 consecutive months immediately preceding the deadline set for receipt of bids or proposals per [AS 16.05.415\(a\)\(2\)](#)?

**YES**       **NO**

3) Do you certify that the resident(s) used to meet this requirement is claiming residency ONLY in the state of Alaska per [AS 16.05.415\(a\)\(3\)](#)?

**YES**       **NO**

4) Do you certify that the resident(s) used to meet this requirement is NOT obtaining benefits under a claim of residency in another state, territory, or country per [AS 16.05.415\(a\)\(4\)](#)?

**YES**       **NO**

4) Per [AS 36.30.990\(2\)\(D\)](#), is your business (**CHOOSE ONE**):

A. **Incorporated or qualified to do business under the laws of the state?**

**YES**       **NO**

If **YES**, enter your current **Alaska corporate entity number**: [Click or tap here to enter text.](#)

B. A **sole proprietorship** AND the proprietor is a resident of the state?

**YES**       **NO**

C. A **limited liability company** organized under AS 10.50 **AND** all members are residents of the state?

**YES**       **NO**

Please identify each member by name: [Click or tap here to enter text.](#)

D. A **partnership** under former AS 32.05, AS 32.06, or AS 32.11 **AND** all partners are residents of the state?

**YES**       **NO**

Please identify each member by name: [Click or tap here to enter text.](#)

#### **Alaska Veteran Preference Questions:**

1) Per [AS 36.30.321\(F\)](#), is your business (**CHOOSE ONE**):

A. A **sole proprietorship** owned by an Alaska veteran?

**YES**       **NO**

B. A **partnership** under AS 32.06 or AS 32.11 **AND** a majority of the partners are Alaska veterans?

**YES**       **NO**

- C. A **limited liability company** organized under AS 10.50 **AND** a majority of the members are Alaska veterans?  
 **YES**             **NO**
- D. A **corporation** that is wholly owned by individuals, **AND** a majority of the individuals are Alaska veterans?  
 **YES**             **NO**

Per [AS 36.30.321\(F\)\(3\)](#) “**Alaska veteran**” is defined as an individual who:

(A) Served in the

- (i) Armed forces of the United States, including a reserve unit of the United States armed forces; or
- (ii) Alaska Territorial Guard, the Alaska Army National Guard, the Alaska Air National Guard, or the Alaska Naval Militia; and

(B) Was separated from service under a condition that was not dishonorable.

Do you certify that the individual(s) indicated in **Question 1A, 1B, 1C, or 1D** meet this definition and can provide documentation of their service and discharge if necessary?

**YES**             **NO**

**Please list any other Alaska preferences offeror is claiming**

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**SIGNATURE**

By signature below, I certify under penalty of law that I am an authorized representative of [Click or tap here to enter text.](#) and all information on this form is true and correct to the best of my knowledge.

Printed Name \_\_\_\_\_

Title \_\_\_\_\_

Date \_\_\_\_\_

Signature \_\_\_\_\_

## **SUBMITTAL FORM B – Minimum Past Performance and Certifications Requirements**

SPECIAL REQUIREMENTS: This Submittal Form must not identify the offeror's proposed costs and must not exceed five pages (reference RFP section 4.04).



## **SECTION 1: Government Experience**

### **1.1 Performance Management Project**

Tandem Motion successfully led a 10-week performance management project October–December 2019 to produce values, department-, division-, and functional-level objectives and KPIs, individual performance metrics, and individual SMART goals tied directly to organizational objectives for over 1,700 State of Alaska (SOA) employees across the Department of Administration (DOA) and Department of Environmental Conservation (DEC).

#### **1.1.1 Objectives**

The objectives of the DOA and DEC performance management pilot were to enable a telecommuting workplace environment by ensuring every employee had defined job-specific performance and behavioral expectations, rating scales, and SMART goals that directly tied to the organizational objectives.

#### **1.1.2 Key Activities**

##### **Organizational Objectives and KPIs**

Tandem Motion worked with DOA and DEC Commissioners, Deputy Commissioners, and Division Directors to define department-level goals, objectives, and key performance indicators (KPIs). Division Directors participated in individual review sessions with Tandem Motion to develop and communicate division-level objectives to functional-area leads. Tandem Motion also facilitated individual review sessions for functional-area leads to align objectives and KPIs with the respective division and department.

##### **Individual Performance Metrics**

Tandem Motion led a series of live video conferencing calls across DOA and DEC to train employees on how to identify the most valuable work performed in alignment with the functional area, division, and department objectives.

##### **Organizational Values**

Tandem Motion introduced the concept of department-wide values to DOA and DEC and worked with Commissioners to identify values relevant to the work performed. Employees were given an opportunity to provide feedback on drafted values before they were integrated into the performance evaluation process. Through values, employees learned they would be measured on *how* they performed their work in addition to *what* work they performed.

##### **Individual SMART Goals**

Tandem Motion facilitated live training and produced training guides, worksheets, and checklists to aid supervisor-led working sessions to establish individual SMART goals in alignment with organizational objectives. Tandem Motion reviewed employee SMART goals upon request to provide additional guidance where required.

##### **Digital Workflow**

Tandem Motion created a digital, form-based performance evaluation process for each department to enable paperless workflows to improve oversight and insight during the implementation in the absence of comprehensive performance management software.

#### **1.1.3 Results**

DOA and DEC leadership defined objectives and KPIs and personnel completed performance evaluation forms. DOA and DEC personnel gained job clarity about what was expected from their performance and how their performance would be measured to prepare for a teleworking environment.

## **SECTION 2: Microsoft Project Experience**

### **2.1 HR Consolidation**

Tandem Motion successfully led the Department of Personnel and Labor Relations (DOPLR) through the 12-week Phase I SOA HR Executive Branch Consolidation project from August to October 2019. Tandem Motion used Microsoft Project to track the progress of deliverables to ensure on-time delivery, as well as provide project status outputs for the project leadership team.

#### **2.1.1 Objectives**

The purpose of the HR Consolidation was to increase the accountability and streamline HR activities within the Executive Branch of State government through the alignment of agency HR personnel to the Director of DOPLR.

#### **2.1.2 Key Activities**

Tandem Motion led DOPLR functional-area leads and representatives through working sessions to baseline current work, document work processes, identify process inefficiencies, and assess the value of work tasks. These inputs were used to identify new and revised future-state work activities. Job profiles were then created to clarify future-state roles in support of the work. Tandem Motion advised the project leadership team on the design of an organizational structure for DOPLR that best supported the needs of SOA employees. Microsoft Project was used to ensure on-time completion of deliverables across eight functional work streams and track the progress of critical process inputs. Additionally, applications from across the Microsoft Office suite were used to communicate with the client, analyze data, and produce and present deliverables.

#### **2.1.3 Results**

An organizational model and job profiles were created to align all agency and DOPLR personnel under the Director of DOPLR. A roadmap with suggested next steps was shared with the project leadership team to provide guidance on how to implement the organizational structure.

### **2.2 Enterprise-Wide Organizational Design and Change Management Center of Excellence (OD and CM CoE)**

Cara Griffith, Founder and Principal of Tandem Motion, led the strategy and implementation phases to establish an enterprise-wide OD and CM CoE for a Fortune 100 energy company.

#### **2.2.1 Objectives**

The project objectives were to design and build an internal OD and CM CoE program to reduce reliance on external vendors.

#### **2.2.2 Key Activities**

Cara Griffith used Microsoft Project to manage a team of consultants and multiple vendor and client relationships across six work streams, including stakeholder management, communications, measurement, training, organizational design, and governance. Ms. Griffith additionally used Microsoft Project to manage deliverable timelines and provide project status reports on progress, utilization rates, and costs to a vice-president-level steering committee. Applications from across the Microsoft Office suite were also used to communicate with the client, analyze data, and produce and present deliverables.

#### **2.2.3 Results**

Internal employees successfully integrated into the OD and CM CoE program roles to lead corporate and subsidiary program efforts impacting over 33,000 employees.

## **SECTION 3: Workforce Consulting Experience**

Cara Griffith, Founder and Principal of Tandem Motion, has led workforce management, performance management, and organizational design and development consulting engagements for Fortune 100 companies, Fortune 500 companies, private companies, global non-profits, and government entities for over seven years.

### **3.1 Project Experience Highlights**

- **Government:** Led the State of Alaska's Department of Administration (DOA) and Department of Environmental Conservation (DEC) through one-on-one strategic planning sessions with 2 Commissioners, 3 Deputy Commissioners, and 15 Division Directors, and led over 1,700 employees through the process of developing performance expectations, rating scales, and SMART goals

- **Government:** Led the organizational redesign for the State of Alaska’s nearly 200-person Department of Personnel & Labor Relations (DOPLR) by documenting process flows, creating job profiles, and designing the recommended organizational structure
- **Fortune 100 Global Retail:** Facilitated alignment conversations with HRVPs across 4 business areas to implement paperless onboarding with a total opportunity size of ~\$241.5M savings
- **Fortune 100 Global Software:** Lead 20+ process design working sessions with 3 HRVPs, 9 HRBPs, 4 Senior Directors, and 2 Directors across 3 global regions and documented 9 HR process flows
- **Fortune 100 Energy:** Created the governance, operating model, organizational design, and competency model for a new, centralized shared services Center of Excellence (CoE)
- **Fortune 100 Global Insurance:** Produced a change management strategy and plan to address 32 HR policy changes impacting 70,000 employees in North America
- **Fortune 100 Global Petroleum:** Facilitated vision and communications strategy sessions with 12 clients to align on joint-venture initiative strategy and coached 2 HRVPs for a company-wide roadshow
- **Fortune 100 Global Technology:** Conducted global working sessions to refine 9 activity areas, created and scored activities against criteria resulting in the identification of 49% of activities for centralization
- **Fortune 500 Global Foodservice:** Produced sizing model and organizational and team structure for 5 global business services sales regions with anticipated cost savings of ~\$40M–\$50M
- **Fortune 500 Global Pharmaceutical:** Advised Global Head of HRIT on Change Strategy in preparation for an acquisition
- **Fortune 500 Global Pharmaceutical:** Designed an adoption strategy for 4 global regions to use a Multi-Channel Relationship Marketing approach with anticipated cost savings of ~\$5M
- **Fortune 500 Global Consumer Goods:** Developed change strategy for GBS process transformation across 4 global regions
- **Private National Insurance:** Facilitated sessions with 6 Leads, 1 Manager, and 3 Analysts across the business and IT to assess and define the roles and responsibilities for the analytics department
- **Global Non-Profit:** Designed and built a workforce planning program for an organization operating in over 45 countries



THE STATE  
of **ALASKA**  
GOVERNOR MIKE DUNLEAVY

Department of Administration

KELLY TSHIBAKA, COMMISSIONER

550 W. 7<sup>th</sup> Ave., Ste. 1970  
Anchorage, AK 99501  
Main: 907.269.6293  
Fax: 907.465.2135  
[www.doa.alaska.gov](http://www.doa.alaska.gov)

July 27, 2020

To Whom It May Concern:

I highly recommend Cara Griffith and Tandem Motion for complex work involving preparing personnel, supervisors, and leadership for managing performance, improving outcomes, and recruiting and retaining high performers.

When I was appointed Commissioner of the Department of Administration (DOA) in 2019, I found most of the 1100+ (DOA) employees did not receive regular performance evaluations or have them on file. Moreover, the performance review process used by the State of Alaska did not require clear performance objectives that resulted in defined outcomes and deliverables. As a result, employees lacked clarity in their job duties, morale was low, and department was less than effective at achieving its mission goals.

DOA executed a contract with Tandem Motion to lead our effort in: a) establishing organization objectives throughout all divisions; b) define metrics and SMART goals; c) identify values of departments on which to rate employees; and d) develop new performance management form for the workforce. The goal was to align the workforce to perform the most valuable work and improve performance. Ms. Griffith led the effort within Tandem Motion, and successfully coached and motivated supervisors to develop goals, objectives, and individualized performance metrics for their employees. She also completed the project on time and on budget, including providing the department with recommended follow-up actions to take going forward.

I particularly appreciated how Tandem Motion went above-and-beyond in the task required of them by digitizing and streamlining the processes they created for DOA. For example, they created digitized processes for submitting performance reviews, electronic surveys on how the performance change process was going and conducted numerous webinars to answer questions and provide change management to staff on how the new processes would work going forward. All these steps created a healthy and positive transition to our new performance management system in only a few months.

Tandem Motion's success was so well-known that another Commissioner asked to participate in the pilot project as well. Without any further compensation, Ms. Griffith offered to assist that department in developing objectives, metrics and goals, and a new performance management form as well. She completed the performance management system for the other department in the same time she completed it for DOA. Her investment and commitment to the improvement of the SOA was demonstrable. The quality and excellence of her work was undeniable—union

Tandem Motion – Letter of Recommendation

July 27, 2020

Page 2 of 2

leaders who initially protested this initiative were commending it by the end because the employees were so grateful for it!

Ms. Griffith and Tandem Motion were more than contractors—they were partners in achieving the vision, transformation, and goals we sought as a department. They accomplished it on time, within budget, with excellence, and by exceeding our expectations. I highly recommend Tandem Motion as an HR or Performance Management consultant and contractor—you will find a partner and force multiplier who will help you achieve your objectives in record time!

Sincerely,



Kelly Tshibaka  
Commissioner



THE STATE  
of **ALASKA**  
GOVERNOR MIKE DUNLEAVY

**Department of Environmental  
Conservation**

OFFICE OF THE COMMISSIONER

Post Office Box 111800  
Juneau, Alaska 99811-1800  
Main: 907.465.5066  
Fax: 907.465.5070

July 31, 2020

Ms. Linda Polk  
Deputy Chief Procurement Officer  
Department of Administration  
Post Office Box 110200  
Juneau, Alaska 99811

Dear Ms. Polk:

I am writing to recommend the services of Cara Griffith of Tandem Motion. Ms. Griffith assisted the Department of Administration and the Department of Environmental Conservation with their Performance Evaluation Pilot Program in 2019/20. The purpose of the Pilot Program is to improve the state's performance evaluation process.

Ms. Griffith provides high quality service, is full of energy and her enthusiasm is contagious. She is easy to work with, thinks creatively, and communicates clearly. She was very effective in identifying areas in need of improvement and guiding us to a solution. I found Ms. Griffith to be professional, helpful and complete in her services. I highly recommend her business.

Please contact me if you have any questions.

Sincerely,

A handwritten signature in black ink, appearing to read "Jason W. Brune".

Jason W. Brune  
Commissioner



THE STATE  
of **ALASKA**  
GOVERNOR MIKE DUNLEAVY

## Department of Administration

OFFICE OF THE COMMISSIONER

550 W. 7<sup>th</sup> Ave., Ste. 1970  
Anchorage, AK 99501  
Main: 907.269.6293  
Fax: 907.465.2135  
[www.doa.alaska.gov](http://www.doa.alaska.gov)

July 29, 2020

Subject: Letter of Reference

To Whom it May Concern:

Tandem Motion and specifically Cara Griffith, assisted the State of Alaska with the consolidation of Human Resources functions for the Executive Branch. Tandem Motion began with a planning process that included the creation and validation of a comprehensive project plan, communication plan, and data collection plan. Cara successfully conducted a thorough business process review with stakeholders and HR subject matter experts. She identified data needs and performance measures, tracked current work and results, identified workforce needs, and provided workforce planning and organization design models. The State of Alaska received clear strategies for effectively consolidating its ~200 HR employees from 15 separate HR offices into one high-functioning and modern HR team. Deliverables included documented HR process flows, a comprehensive list of existing process inefficiencies, suggested HR competencies and ways to close competency gaps, and an implementation plan and tools to assist with implementation.

Throughout the project, Cara Griffith was a positive and influential professional. She was successful and effective in building stakeholder understanding and buy-in, documenting current process workflow and inefficiency, collaboratively developing a future state, and crafting a roadmap, with tools, that would allow the State to meet its objectives in the HR consolidation effort. Tandem Motion met and exceeded the State's expectations of service delivery and project outcomes.

I am pleased to recommend Tandem Motion and Cara Griffith.

Sincerely,

A handwritten signature in black ink, appearing to read "Amanda Holland".

Amanda Holland  
Deputy Commissioner  
Department of Administration



THE STATE  
*of* **ALASKA**  
GOVERNOR MIKE DUNLEAVY

**Department of  
Administration**

DIVISION OF FINANCE  
Director's Office

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[www.doa.alaska.gov/dof](http://www.doa.alaska.gov/dof)

July 29, 2020

Linda Polk  
Deputy Chief Procurement Officer  
Department of Administration  
Juneau, AK 99811

Re: Pandemic Preparedness Plan Phase 2 – Personnel Management Reference

Dear Ms. Polk,

During the autumn of 2019, I worked directly with Cara Griffith of Tandem Motion in the development of the performance evaluation pilot for the Division of Finance. While I was working with Cara, she was part of a larger performance evaluation pilot project that included the entire Department of Administration and the Department of Environmental Conservation.

At a high level, the goal of the project where I worked with Tandem Motion was to align the new employee performance evaluation with the strategic goals of the Department of Administration and the Division of Finance.

The scope of work undertaken by Tandem Motion included:

- Review of each division's strategic plan.
- Introduced DOA and DEC management to the "Balanced Scorecard" approach to unlocking effectiveness and meeting financial objectives.
- Discussion, evaluation and recommendations for functional area goals and performance metrics and measurement of core values.
- Development of goal setting tools and working sessions for supervisors on how to set SMART goals with employees.
- Worked with managers and supervisors to distinguish between goals (one-time, quantified achievement) and metrics (continuous, quantified measurement).



- Development of an annual performance evaluation form and supervisor instructions for performance expectation conversations.

The scope of work listed above was complicated by the breadth of domains within which the project was executed. The Department of Environmental Conservation and Department of Administration are very different from one another. I'm particularly impressed with the intellectual dexterity the Tandem Motion team displayed while working the project in two different departments simultaneously. There is a wide diversity of domains even within Department of Administration, which manages everything from the Division of Motor Vehicles to the Office of Public Advocacy. Aligning strategy, core values, metrics, and performance evaluations across such a number and diverse business areas is a herculean feat.

During the term of this engagement, Cara and members of the Tandem Motion team always displayed the highest degree of professionalism. They demonstrated the utmost competency in relevant areas of human resource management, performance metrics, best practices, and organizational psychology. Tandem Motion expertly managed project meetings, trainings, and Zoom calls with dozens of individuals across two departments. Deliverables never slipped through the cracks and Tandem Motion always stayed on time with the project.

Tandem Motion is a team of talented human resources professionals and the receive my highest recommendation.

Sincerely,



Hans Zigmund  
Finance Director  
Department of Administration, Division of Finance  
(907) 465-3435



THE STATE  
*of* **ALASKA**  
GOVERNOR MIKE DUNLEAVY

## Department of Administration

### DIVISION OF PERSONNEL AND LABOR RELATIONS

10<sup>th</sup> Fl. State Office Building  
PO Box 110201  
Juneau, Alaska 99811-0201  
Main: 907.465.4430  
Fax: 907.465.3415  
[www.doa.alaska.gov/dop/](http://www.doa.alaska.gov/dop/)

July 30, 2020

To Whom it may Concern,

It is with pleasure to recommend Cara Griffith and her team at Tandem Motion. Ms. Griffith of Tandem Motion was contracted by the State of Alaska for the Statewide Human Resources Consolidation/HR Transformation Project in 2019. She partnered with human resources teams to develop a comprehensive and thorough plan to transform HR into a strategic partnership with the agencies.

Ms. Griffith did an exceptional job of developing project scopes and objectives. She created detailed project plans and tracked our progress throughout the project. She is very knowledgeable, enthusiastic, and experienced when it came to workforce planning. She took the time to evaluate all of our process workflows and procedures as well as supporting documentation. Her greatest value to our organization was the time she spent working with staff during work sessions. She spent many hours guiding staff through the research and planning process and helped us work out the details of our business processes. Through-out the entire process she communicated the benefits of working through this process which resulted a high level of buy-in from staff.

She effectively and efficiently used her knowledge, skills, and techniques to manage the various stages of the project process. At the end of the project she produced a very comprehensive report for the HR Organization Structure. The report included information such as, the current strengths and weakness of our existing structure, future structure and HR organizational models for considerations, and organization-wide themes.

Her ability to quickly hone-in and understand nuance in our organization led to our own insights to where and how we must align our resources with our mission. I highly recommend Cara to any organization undergoing change.

Sincerely,

Pam Day  
Deputy Director  
Division of Personnel and Labor Relations



THE STATE  
of **ALASKA**  
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## Department of Administration

### DIVISION OF PERSONNEL AND LABOR RELATIONS

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Main: 907.465.4789  
Fax: 907.465.3415  
[www.doa.alaska.gov/dop/](http://www.doa.alaska.gov/dop/)

August 3, 2020

To all interested parties,

This is intended to provide a reference for Ms. Cara Griffith and her team at Tandem Motion. Ms. Griffith of Tandem Motion provided consulting services to the State of Alaska on two separate projects. I first worked with Cara in her role supporting the DOP&LR Management Team with the HR Enterprise Business Model Initiative. I also interacted with Cara in her advisory role for the DOA Performance Evaluation Pilot. Both of these projects were in the latter part of 2019.

My experience working with Ms. Griffith was highly positive. She consistently showed enthusiasm, high energy, and self-confidence throughout the duration of the projects. Cara is an exceptional leader and has a unique ability to facilitate groups, engage her audience and encourage conversation and expression of ideas. Cara is a skilled and effective communicator which was a key factor for her success on both of the projects she assisted the SOA with. Her written communications and work products were thorough, detailed and well organized.

Without hesitation, I highly recommend Ms. Griffith to any organization seeking the services her company offers.

Sincerely,

A handwritten signature in blue ink that reads "Peggy Hart".

Peggy Hart

Human Resource Consultant

Division of Personnel & Labor Relations

(907)465-2498

## **SUBMITTAL FORM C – Understanding of the Project**

SPECIAL REQUIREMENTS: This Submittal Form must not identify the offeror's proposed costs and must not exceed five pages (reference RFP section 4.05).

## **SECTION 4: Purpose**

Tandem Motion understands that the impacts of the pandemic have resulted in an urgent need for performance and learning management processes and systems to support personnel to effectively deliver state services in a telecommuting workplace environment. SOA employees need to understand the expectations for their performance in a telecommuting environment and be given the structure and support to develop professionally to serve the State's customers.

## **SECTION 5: Scope**

SOA personnel from all 14 departments will define performance metrics, including expectations, rating scales, and SMART goals, which are directly tied to the organizational objectives and key performance indicators.

The project leadership, learning and development team, and functional-area leads will identify training topics relevant to the needs of the workforce to increase competencies. Customized training programs, including recruitment and onboarding, will be developed to support personnel. Performance management and learning management systems will be selected, established, and deployed to support personnel in a telecommuting workplace environment. Classifications and position descriptions will be redefined to increase job clarity, roles, and responsibilities for current and future personnel.

## **SECTION 6: Objectives**

### **6.1 Performance Management**

The following components of the implementation of a digital, state-wide performance management process should be completed by December 31, 2020.

- Department leadership and supervisors must be equipped to manage employees in a telecommuting environment. The establishment of a performance management process aligned with organizational goals is a critical component of this objective.
- Department Commissioners, Division Directors, and functional-area leads need to establish organizational objectives and key performance indicators (KPIs) relevant to each layer of the organization in order to clearly communicate strategic direction and performance expectations to employees.
- Job-relevant competencies should be defined with specific behavioral indicators to ensure that each employee clearly understands the behavioral expectations on which they will be measured, as well as how they will be measured. This will enable employees to focus on developing the competencies with the greatest impact on their work.
- All Department personnel must participate in defining performance metrics, job-specific performance expectations, performance evaluation scales, and individual SMART goals in support of organizational objectives to ensure work effort and employee development improves organizational outcomes.
- The SOA should identify the most valuable work activities to be measured to create job clarity and purpose, improve employee performance, and identify and retain high performers.
- A performance management system software solution that integrates with existing and planned SOA software systems will be identified to allow the performance evaluation process to operate in a telecommuting environment.

### **6.2 Learning Management**

The implementation of a state-wide learning management program pilot that supports employees in a telecommuting environment should be completed by December 31, 2020 and include the following components.

- A customized training program to increase workforce competencies
- Targeted online trainings
- The identification of a learning management system (LMS) software solution that meets the integration requirements of existing and planned SOA software systems

### **6.3 Classification**

The classifications and position descriptions need to be reviewed and revised as necessary to increase job clarity for personnel in each position in a telecommuting workforce environment.

### **6.4 Recruitment and Onboarding**

As the classifications and position descriptions are redefined, the recruitment and onboarding process may be impacted. A job-specific recruitment and onboarding program that supports the changes made in the classification process will create a cohesive experience for the SOA personnel.

## **6.5 Workforce Playbook**

The workforce playbook will provide the tools, templates, and guidance needed to identify the most valuable work performed throughout the organization. The playbook will guide the user to align the workforce and provide guidance on how to improve performance, and recruit and retain high performers.

# **SECTION 7: Deliverables**

## **7.1 Project Management**

Weekly status reports on deliverables and related activities will be provided. Status reports will include standardized reporting on the status of deliverables and related activities, including completion measures, pending work, budget execution, project risks and mitigation, required decisions, resource utilization, and availability and completion projections.

Identified project risks will be raised to the quality assurance (QA) team.

A roadmap of all activities will be provided for review and approval within the first two weeks of the project.

Key performance indicators will be established and maintained for project deliverables and activities.

Required check-in meetings with the QA team and the state project governance team will be attended monthly.

A timetable will be established for deliverables, key performance management implementation milestones, and deliverable reviews with the state project governance team.

## **7.2 Performance Management**

Editable, electronic versions of the job-specific performance expectations will be developed to create clarity and accountability for every SOA employee.

## **7.3 Learning Management**

A roadmap will be developed with the required supporting activities to establish and deploy a learning management program, system, and software.

Remote training platform(s) will be identified to support the learning management program in a telecommuting workplace environment.

## **7.4 Classification**

Classification and position descriptions will be redefined to support a telecommuting workplace environment.

## **7.5 Recruitment and Onboarding**

A customized recruitment and onboarding program will be developed to support a telecommuting workplace environment.

## **7.6 Workforce Playbook**

A playbook will be developed to guide the reader on how to align the workforce to perform the most valuable work, improve performance, and retain and recruit high performers.

# **SECTION 8: Pertinent Issues and Potential Problems**

## **8.1 Systems Vendor**

Performance management system and learning management system software vendors may not be able to meet a deployment timeline that supports performance management and learning management activities.

In the event that software is not in place when required, Tandem Motion is prepared to develop an interim, electronic form-based performance management solution and video training learning management solution to complete the project on-time.

## **8.2 Executive Leadership Involvement**

SOA Commissioners and Division Directors may be unable to participate in required strategic planning working sessions to complete Division and Department objectives and KPIs within the proposed timeframe.

Tandem Motion will be prepared to host one-on-one sessions with Commissioners and Division Directors to ensure objectives and KPIs are completed to support the alignment of performance metrics.

## **8.3 Workforce Data Accuracy**

The SOA may be unable to provide Tandem Motion with accurate data on supervisors and supervisory relationships or an accurate list of all employees within scope.

Tandem Motion is prepared to collect the required data through an enterprise-wide survey.

## **8.4 Distribution List Accuracy**

The SOA may be unable to provide Tandem Motion with accurate distribution lists for personnel within scope. Required distribution lists will include SOA Commissioners, Division Directors by department, functional-area leads by department, all employees by department, and all employees by division.

Tandem Motion is prepared to produce the required distribution lists.

## **8.5 Calendar Visibility**

The SOA may be unable to provide Tandem Motion with visibility and access to personnel calendars to directly schedule meetings with clients.

To mitigate this potential problem, Tandem Motion will ask all division directors to select an internal project coordinator to serve as the primary point of contact for the division.

## **SECTION 9: Timeline**

Tandem Motion understands the establishment and deployment of the performance and learning management programs, processes, and systems is a significant undertaking for the SOA. Therefore, we have selected a team of 30 consultants to provide the level of support needed across the SOA to ensure the project team is able to meet the required schedule. Additionally, a team of 14 HR consultants will work in conjunction with the performance and learning management activities to redefine classifications and position descriptions by December 15, 2020.

We will complete a drafted final project report for review by December 15, 2020. All Phase 2 programs and systems will be established and deployed in pilot status by December 31, 2020. Between December 16, 2020 and January 15, 2021, Tandem Motion will work with the client project team to ensure all deliverables meet expectations before final delivery. By February 1, 2021, all finalized deliverables will be provided in an editable electronic form.

# **SUBMITTAL FORM D – Methodology Used for the Project**

SPECIAL REQUIREMENTS: This Submittal Form must not identify the offeror’s proposed costs and must not exceed five pages (reference RFP section 4.06).



## **SECTION 10: Methodology Overview**

We cultivate an environment of transparency in which goals and objectives are clearly communicated, this creates ownership and buy-in and allows stakeholders to actively participate in creating future solutions for the organization.

We work to create alignment throughout the organization so that each individual has an understanding of the purpose and significance of their contribution to meeting project objectives.

We develop the capabilities of our clients through frameworks, facilitation, and coaching to help them identify and capitalize on their unique strengths to increase the impact of their organization.

## **SECTION 11: Project Leadership**

### **11.1 Leadership Alignment**

*Timeline: August 17–August 28, 2020*

Work with the project leadership team at the start of the engagement to finalize all project objectives and expectations.

Facilitate collective and one-on-one conversations with Commissioners to gain insight into department-level risks, concerns, and opportunities for project activities and outcomes.

Ensure that SOA Commissioners have an understanding of the project objectives and timeline and the role they will play in the project's success.

## **SECTION 12: Project Management Office (PMO) and Organizational Change Management (OCM)**

### **12.1 Project Management**

*Timeline: Duration of the project*

Work with the State project governance team and Quality Assurance team to provide weekly status updates and attend monthly check-in meetings.

Establish and maintain key performance indicators (KPIs) for project deliverables and activities.

Create a clear timeline for completing and reviewing deliverables.

### **12.2 Organizational Change Management**

*Timeline: Duration of the project*

Work with the client to develop and update online information portals containing project information and updates, video recordings of town hall meetings, key documents, and continuously updated frequently asked questions (FAQs).

Provide a dedicated project support mailbox and resources to receive and respond to employee questions related to the project.

Support organizational leaders by providing messaging and templates for meeting invitations and notes, project updates, and other communications as required.

Develop and manage a communications plan to ensure that all SOA employees have a complete understanding of what is expected of them to meet project objectives.

Administer employee engagement surveys throughout the project to provide insights into where additional support may be required.

## **SECTION 13: Organizational Objectives and Key Performance Indicators (KPIs)**

### **13.1 Organizational Objectives and KPIs**

*Timeline: August 24–December 11, 2020*

Invite Commissioners to participate in working sessions to establish department-level objectives and KPIs to guide their people.

Facilitate two four-hour working sessions for Division Directors to develop division-level objectives and KPIs in alignment with those of the department (Commissioners are invited, but not required, to participate in these sessions).

Provide supplementary support to Commissioners and Division Directors who require additional assistance defining objectives and KPIs.

Provide support from September 14–18 to Commissioners and Division Directors who require additional assistance in defining objectives and KPIs.

Facilitate a functional-area lead training session the week of September 21 and provide supporting materials to guide the drafting of objectives and KPIs.

Provide supplementary support to functional-area leads who require additional assistance defining objectives and KPIs from September 21–October 2.

Develop training and supporting materials to assist functional-area leads in developing functional-area-level objectives and KPIs in alignment with those of their respective divisions and departments.

Make ongoing coaching available to Commissioners and Division Directors on objectives and KPIs from September 21 through November 27.

Host Commissioner and Division Director townhall between November 30 and December 11, 2020 to ensure leadership accountability for established objectives and KPIs.

## **SECTION 14: Performance Management**

### **14.1 Performance Management System Software**

*Timeline: August 17, 2020–February 28, 2021*

Facilitate performance management system software requirements analysis sessions with designated client leads at the beginning of the engagement to identify selection criteria and implementation objectives.

Work with the client to identify and evaluate vendors for selection.

Support client during the deployment phase to ensure implementation objectives and timeline are met.

### **14.2 Performance Metrics Training**

*Timeline: August 24–September 11, 2020*

Develop a customized performance metrics training covering performance expectations, rating scales, and SMART goals aligned to organizational objectives and KPIs for each of the following four levels:

- Executives (Commissioners, Deputy Commissioners, Division Directors, Deputy Directors): September 14
- Managers (Functional-area leads): September 28
- Supervisors: October 12
- Individual Contributors (Employees without supervisory duties): October 26

### **14.3 Establish Performance Metrics**

*Timeline: September 14–November 6, 2020*

SOA employees to develop performance metrics, rating scales, and KPIs using provided worksheets, and with the support of the previously described Performance Metrics Training, over 10 consecutive business days.

#### **14.4 Performance Management Supervisor Training Curriculum**

*Timeline: September 8–September 24, 2020*

A customized performance management supervisor training targeting all SOA supervisors will be developed for launch on September 28, and will include the following topics:

- Major components of the performance management process
- The importance of ongoing, constructive, and specific behavioral feedback
- How to provide effective feedback (minimize defensiveness and maintain self-esteem)
- How to provide effective coaching, including identifying and addressing development needs
- How to conduct and document effective formal review sessions
- How to write narratives that support employee ratings
- How to approach corrective actions
- How to approach disciplinary or serious performance problems
- How to build trust between managers and staff

Supervisors to complete a subset of six modules by November 9 to equip them to facilitate performance evaluation conversations with direct reports.

### **SECTION 15: Client Feedback**

#### **15.1 Organizational Objectives and KPIs Feedback**

*Timeline: September 14–September 25, 2020*

A team of 20 Industrial-Organizational Psychology professionals will review and provide feedback on proposed objectives and KPIs to ensure that all objectives and parameters are met.

#### **15.2 Performance Metrics Feedback**

*Timeline: September 28–November 6, 2020*

A team of 20 Industrial-Organizational Psychology professionals will review and provide individualized feedback on proposed performance metrics to ensure accuracy.

### **SECTION 16: Classification**

Dates: August 17 – December 11, 2020

Facilitate working sessions to assess the current state of the classification program and set target objectives.

Identify opportunities for the consolidation of position descriptions (PDs) and job classes and levels.

Provide recommendations for changes to the job classification system to meet target objectives.

Revise Classification and Class Specifications Administrative Guidelines, Job Families, and the Job Class Table.

Identify required changes to classification specifications and PDs to ensure alignment with the revised classification system.

### **SECTION 17: Program Design**

#### **17.1 Competency Guide**

*Timeline: August 31–October 2, 2020*

Identify competencies and draft definitions for executives, managers, supervisors, and individual contributors.

Conduct an enterprise-wide validity study to assess the job-relevance of proposed competencies and select competencies that should be measured through the performance evaluation process.

### **17.2 Learning Management System Software (Remote Training Platform)**

*Timeline: August 24–December 31, 2020*

Facilitate learning management system software requirements analysis sessions at the beginning of the engagement with the learning and development team and designated client leads to identify selection criteria and implementation objectives.

Work with the client to identify and evaluate software vendors for selection.

Support the client during the deployment phase to ensure the implementation objectives and timeline are met.

### **17.3 Learning Management Program**

*Timeline: August 24–December 15, 2020*

Facilitate planning sessions with the learning and development client team and designated client leads to establish program objectives and KPIs.

Perform a gap analysis to assess the current learning and development program and develop future-state program objectives.

Partner with the learning and development team to define a governance model covering roles, responsibilities, and escalation paths.

Identify training topics by job family.

Conduct an enterprise-wide validity study to assess the relevance of proposed training topics to each job family and select those to be recommended for deployment.

### **17.4 Supervisor Skills Training Curriculum**

*Timeline: September 21–December 31, 2020*

Produce customized supervisor skills trainings, designed to be taken over a period of 12 months, to equip existing and new supervisors to successfully carry out the challenging responsibilities of employee management. Training topics will be finalized with the learning and development team, but are expected to include the following:

- Introduction to supervision essentials
- Effective communications
- Performance management/setting goals
- Setting learning and development plans for employees
- Leading effective meetings
- Problem solving & brainstorming
- Employee engagement tools

### **17.5 Learning and Development Guide**

*Timeline: September 28–October 2, 2020*

Produce a learning and development guide containing recommended stretch assignments, on-the-job experiences, articles and books, and training topics to support the employees in the creation of learning and development plans.

### **17.6 Onboarding Program**

*Timeline: August 31–December 15, 2020*

Facilitate working sessions with designated client leads to establish program objectives and KPIs.

Perform a current-state assessment to identify the activities required to meet program objectives and KPIs.

Work with designated client leads to develop a governance model including roles, responsibilities, and escalation paths.

Identify client representatives to participate in the design and validation of the job-specific onboarding process.

Develop a roadmap with supporting activities to support the continued development of job-specific onboarding beyond the consulting engagement.

### **17.7 Recruitment Program**

Timeline: November 2–December 15, 2020

Facilitate planning sessions with designated client leads to establish objectives, expectations, and KPIs.

Perform a current-state assessment to identify the activities required to meet program objectives and KPIs.

Work with designated client leads to develop a governance model including roles, responsibilities, and escalation paths.

Develop a customized four-module training to include the following topics for SOA employees who participate in the hiring process:

- How to write interview questions and interpretive guides
- How to evaluate work samples
- How to conduct reference checks
- How to conduct frame-of-reference training for hiring managers

Develop a roadmap with supporting activities to guide program development beyond the engagement.

### **17.8 Workforce Playbook**

Timeline: November 16–December 15, 2020

Develop a customized workforce playbook covering the following topics:

- Identify the most valuable work performed for the organization
- Align the workforce to the most valuable work
- Improve employee performance
- Retain and recruit high-performers

Work with designated client leads to ensure that content is appropriate to and meets the expectations of the intended audience.

### **17.9 Client Support**

*Timeline: December 16, 2020–February 28, 2021*

Support the client through the duration of the Phase 2 contract concluding February 28, 2021.

Work with the client to review and revise deliverables to ensure that all objectives are met before finalized deliverables are transferred to the client on February 1, 2021.

Support the continued development of newly created learning and development, recruitment, onboarding, and performance management programs.

## **SUBMITTAL FORM E – Management Plan for the Project**

SPECIAL REQUIREMENTS: This Submittal Form must not identify the offeror's proposed costs and must not exceed five pages (reference RFP section 4.07).

## **SECTION 18: Management Plan Structure and Key Personnel**

Tandem Motion has structured the management plan for this project with one Managing Director and six Workstream Leads. Workstreams include the Project Management Office (PMO) and Organizational Change Management (OCM), Organizational Objectives and Key Performance Indicators (KPIs), Client Feedback, Performance Management, Classification, and Program Design.

### **18.1 Managing Director**

Cara Griffith, Founder and Principal of Tandem Motion, will serve as the Managing Director. Ms. Griffith will manage the workstream leads and is ultimately accountable for the quality and timeliness of all produced deliverables. Ms. Griffith will plan to attend all scheduled deliverable reviews and monthly check-in meetings with the State Project Governance and Quality Assurance teams. Ms. Griffith will also lead conversations with the designated client representative(s) to build out the learning management system (LMS) and performance management system (PMS) selection criteria and roadmap. Following the objectives and KPIs working sessions with the Commissioners and Division Directors, Ms. Griffith will lead the functional-area leads through the identification of objectives and KPIs. Ms. Griffith will be the primary contact for Commissioners and Division Directors throughout the duration of the project.

### **18.2 PMO & OCM Workstream Lead**

Meg Sayre, Organizational Consultant, will lead the PMO & OCM Workstream. Ms. Sayre will be accountable for producing weekly status reports, the establishment of KPIs and reporting and maintenance, the objectives and performance management timetable, and the project plan. Ms. Sayre will be accountable for the work produced by a team of Human Capital Consultants, the Media Production Specialist, and the Visual Communications Designer.

### **18.3 Organizational Objectives & Key Performance Indicators (KPIs) Workstream Lead**

Randy Gardiner, Organizational Strategy Consultant, will lead the Commissioners and Division Directors through the strategic planning process to define the organizational objectives and KPIs with the support of the Managing Director, Cara Griffith. Ms. Griffith will be accountable for ensuring Commissioners and Division Directors complete organizational objectives and KPIs.

### **18.4 Client Feedback Services Workstream Lead**

Alexandra Petruzzelli, Organizational Consultant, will be accountable for managing the feedback loop between the client and a team of 20 Organizational Psychology Consultants, Analysts, and a Human Capital Consultant selected for their experience in research-based performance management practices. Ms. Petruzzelli will escalate any Commissioner or Division Director client support requests directly to the Managing Director, Cara Griffith.

### **18.5 Performance Management Workstream Lead**

Dr. Jevon Powell, Organizational Psychology Consultant, will be accountable for the design and creation of the training curriculum and supporting materials for performance expectations, rating scales, SMART goals, supervisor performance management, and supervisor skills. Managing Director, Cara Griffith, will support Dr. Powell by working with the designated learning and development client lead to ensure the topics recommended and materials produced align with the client's expectations.

### **18.6 Classification Workstream Lead**

Shannon Drohman, Human Resources Consultant, will be accountable for the redefinition and consolidation of classifications and position descriptions. Managing Director, Cara Griffith, will support Ms. Drohman in Classification client lead conversations regarding objectives and the job family redesign process.

### **18.7 Program Design Workstream Lead**

Cara Griffith, Founder and Principal of Tandem Motion, is the Managing Director and will also lead the Program Design Workstream. Ms. Griffith will partner with designated clients to lead the design and build of the recruitment, onboarding, and learning management programs, and the workforce playbook. Additionally, Ms. Griffith will lead a team of eight Organizational Psychology Consultants, Analysts, and a Human Capital Consultant to build the Competency Guide and Learning & Development Guide.

# 18.8 Accountability Matrix

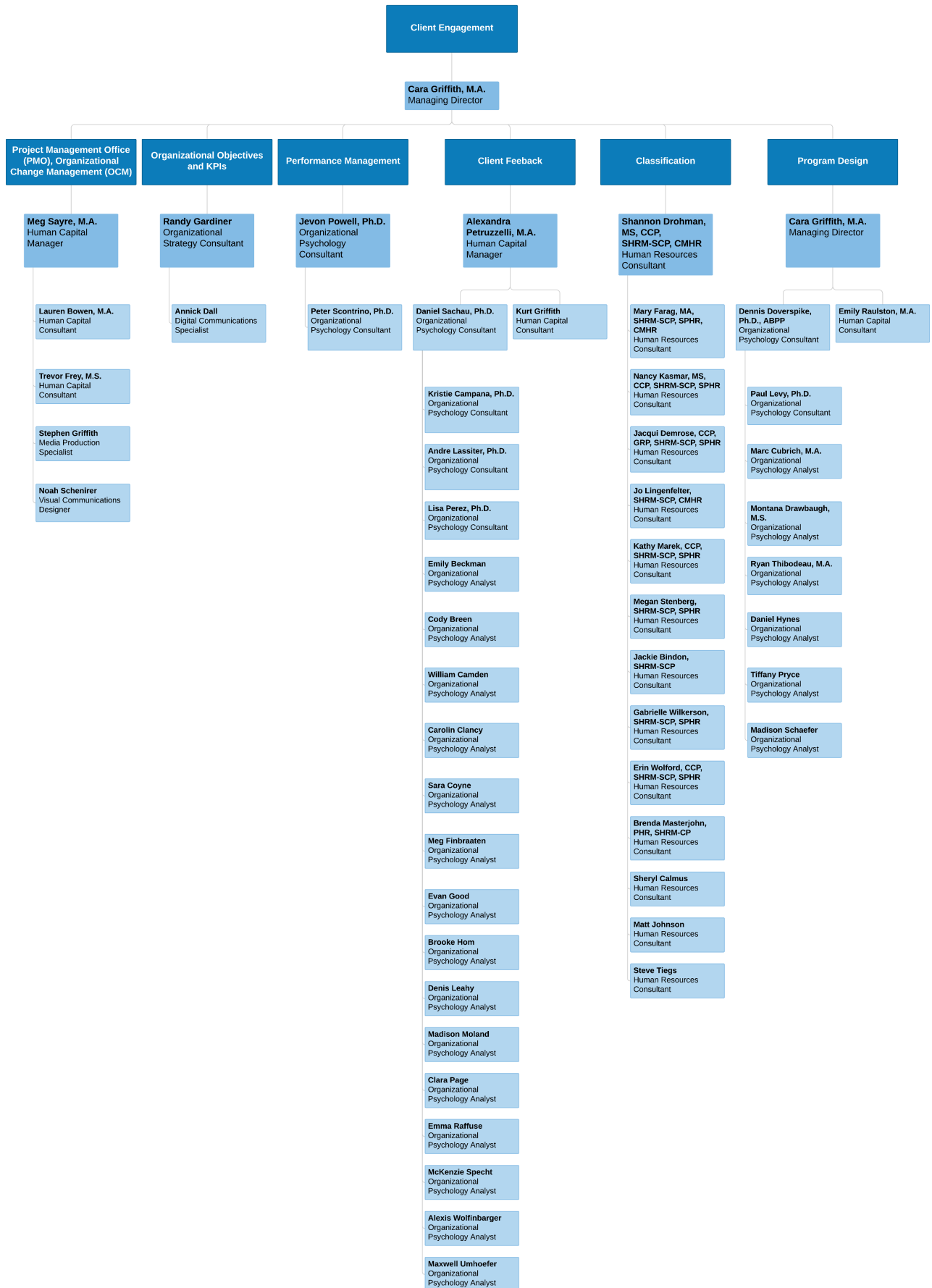
Name	Description	Accountable	Responsible	Due
Deliverable Review Meetings (as scheduled)	Meet with the State Project Governance Team to review deliverables on an agreed upon schedule.	Cara Griffith, M.A., SHRM-CP	Meg Sayre, M.A.	
Status reports (weekly)	Provide standardized reporting on the status of deliverables and related activities, with measures of completion, pending work, budget execution, risk and mitigation, required decisions, utilization, and availability and completion projections.	Meg Sayre, M.A.	Trevor Frey, M.S.	
Check-in Meetings (monthly)	Attend check-in meetings with the State Project Governance Team and the Quality Assurance team.	Meg Sayre, M.A.	Trevor Frey, M.S.	
Key Performance Indicator (KPI) Reporting	Establish and maintain Key Performance Indicator (KPI) reporting for the project deliverables and activities that will continue to improve teleworking for the State of Alaska and the delivery of government services.	Meg Sayre, M.A.	Trevor Frey, M.S.	8/28/20
Objectives & Performance Management Timetable	Develop clear, timeable for establishing organization objectives, performance metrics, required competencies, SMART goals, and individual objectives tied to measurable outcomes, with periodic and regular deliverable reviews.	Meg Sayre, M.A.	Trevor Frey, M.S.	8/28/20
Project Plan	Roadmap of all activities, with clearly defined objectives and deliverables, to be reviewed and approved in the first 1-2 weeks of the project.	Meg Sayre, M.A.	Trevor Frey, M.S.	8/28/20
Learning Management Roadmap	Build learning management program, system, and software roadmap.	Cara Griffith, M.A., SHRM-CP	Alexandra Petruzzelli, M.A.	8/28/20
Department and Division Objectives and Key Performance Indicators (KPIs)	Commissioners, Deputy Commissioners, Division Directors, and Deputy Directors complete their objectives and KPIs.	Cara Griffith, M.A., SHRM-CP	Randy Gardiner	9/11/20
Executive-level performance expectations, scales, and SMART goals curriculum	Executive-level performance expectations, scales, and SMART goals curriculum is made available for Commissioners, Deputy Commissioners, Division Directors, and Deputy Directors to complete their worksheets.	Jevon Powell, Ph.D.	Peter Scontrino, Ph.D.	9/14/20
Manager-level performance expectations, scales, and SMART goals curriculum	Manager-level performance expectations, scales, and SMART goals curriculum is made available for Functional Area Leads to complete their worksheets.	Jevon Powell, Ph.D.	Peter Scontrino, Ph.D.	9/28/20
Performance Management Supervisor Training Curriculum	The Performance Management Supervisor Training Curriculum is made available to all active SOA supervisors.	Jevon Powell, Ph.D.	Peter Scontrino, Ph.D.	9/28/20
Functional Area Leads Objectives and Key Performance Indicators (KPIs)	Functional Area Leads complete their objectives and KPIs.	Cara Griffith, M.A., SHRM-CP	Cara Griffith, M.A., SHRM-CP	10/2/20
Supervisor-level performance expectations, scales, and SMART goals curriculum	Supervisor-level performance expectations, scales, and SMART goals curriculum is made available for supervisors to complete their worksheets.	Jevon Powell, Ph.D.	Peter Scontrino, Ph.D.	10/12/20
Individual Contributor performance expectations, scales, and SMART goals curriculum	Individual Contributor level performance expectations, scales, and SMART goals curriculum is made available for employees in non-supervisory roles to complete their worksheets.	Jevon Powell, Ph.D.	Peter Scontrino, Ph.D.	10/26/20
Competency & Learning and Development Guide	Validated competencies, definitions, and key learning and development experiences at the executive, manager, supervisor, and individual contributor levels are provided in a guide.	Cara Griffith, M.A., SHRM-CP	Emily Raulston, M.A.	11/2/20
Performance Evaluation Form	Editable electronic version of job-specific performance expectations.	Cara Griffith, M.A., SHRM-CP	Kurt Griffith	11/9/20
Redefined classifications and position descriptions	All State Department classifications and position descriptions have been redefined and consolidated.	Shannon Drohman, MS, CCP, SHRM-SCP, CMHR	Nancy Kasmar, MS, CCP, SHRM-SCP, SPHR	11/20/20
Learning Management Program	Develop a Learning Management Program Guide, gap analysis report, governance model, and validated training topics by job family. Provide a roadmap with supporting activities to build the program beyond pilot status.	Cara Griffith, M.A., SHRM-CP	Emily Raulston, M.A.	12/15/20
Onboarding Program	Develop a Job-Specific Onboarding Program Guide, gap analysis report, governance model, and roadmap with supporting activities to build the program beyond pilot status.	Cara Griffith, M.A., SHRM-CP	Emily Raulston, M.A.	12/15/20
Recruitment Program	Develop a recruitment program guide, gap analysis report, governance model, roadmap with supporting activities, and customized four-module recruitment training curriculum.	Cara Griffith, M.A., SHRM-CP	Emily Raulston, M.A.	12/15/20
Workforce Playbook	Create a customized SOA Workforce Playbook to guide the client through the process of identifying the most valuable work, aligning the workforce, improving performance, and recruiting and retaining high-performers.	Cara Griffith, M.A., SHRM-CP	Emily Raulston, M.A.	12/15/20
Remote training platform(s) deployment	Deploy remote training platform(s) (e.g., learning management system) at least in pilot status.	Meg Sayre, M.A.	Kurt Griffith	12/31/20
Supervisor Skills Training Curriculum	The Supervisor Skills Training Curriculum is made available to all active SOA supervisors and should be made available to new supervisors in the future.	Jevon Powell, Ph.D.	Peter Scontrino, Ph.D.	12/31/20
Learning Management System Deployment	Provide client with learning management system (LMS) selection criteria. Assist the client to select, establish, and deploy an LMS.	Cara Griffith, M.A., SHRM-CP	Kurt Griffith	12/31/20
Performance Management Systems Deployment	Provide client with performance management system (PMS) selection criteria. Assist the client to select, establish, and deploy a PMS.	Cara Griffith, M.A., SHRM-CP	Kurt Griffith	12/31/20
Performance Management Systems Deployment	Provide client with performance management system (PMS) selection criteria. Assist the client to select, establish, and deploy a PMS.	Cara Griffith, M.A., SHRM-CP	Kurt Griffith	12/31/20



## 18.9 Management Plan Timeline

Deliverables and Activities	17-Aug	24-Aug	31-Aug	7-Sep	14-Sep	21-Sep	28-Sep	5-Oct	12-Oct	19-Oct	26-Oct	2-Nov	9-Nov	16-Nov	23-Nov	30-Nov	7-Dec	14-Dec	21-Dec	28-Dec	4-Jan	11-Jan	18-Jan	25-Jan	1-Feb	8-Feb	15-Feb	22-Feb
Status reports (weekly)																												
Check-in Meetings (monthly)																												
Deliverable Review Meetings (as scheduled)																												
Key Performance Indicator (KPI) Reporting																												
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Workforce Playbook																												
Remote training platform(s) deployment																												
Supervisor Skills Training Curriculum																												
Learning Management Program																												
Job-Specific Onboarding Program																												
Recruitment Program																												
Learning Management System Deployment																												
Performance Management Systems Deployment																												
Ongoing program support																												

# 18.10 Project Organizational Chart



# Cara Griffith, M.A., SHRM-CP

Managing Director | Client Engagement

Cara Griffith has collaborated with Fortune 100 and 500 companies, private companies, global nonprofits, and government entities to align and leverage people to achieve organizational objectives. Taking a holistic, co-creative approach, Cara partners with her clients to collectively align people, processes, and structures to reach objectives. Cara's industry experience includes consumer goods, financial services, government, medical devices, non-profit, petroleum, pharmaceutical, technology, and utilities.

## PROJECT EXPERIENCE HIGHLIGHTS

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**Government:** Led the State of Alaska's Department of Administration (DOA) and Department of Environmental Conservation (DEC) through one-on-one strategic planning sessions with 2 Commissioners, 3 Deputy Commissioners, and 15 Division Directors, and led over 1,700 employees through the process of developing performance expectations, rating scales, and SMART goals

**Government:** Led the organizational redesign for the State of Alaska's nearly 200-person Department of Personnel & Labor Relations (DOPLR) by documenting process flows, creating job profiles, and designing the recommended organizational structure

**Fortune 100 Global Retail:** Facilitated alignment conversations with HRVPs across 4 business areas to implement paperless onboarding with a total opportunity size of ~\$241.5M savings

**Fortune 100 Global Software:** Lead 20+ process design working sessions with 3 HRVPs, 9 HRBPs, 4 Senior Directors, and 2 Directors across 3 global regions and documented 9 HR process flows

**Fortune 100 Energy:** Created the governance, operating model, organizational design, and competency model for a new, centralized shared services Center of Excellence (CoE)

**Fortune 100 Global Insurance:** Produced a change management strategy and plan to address 32 HR policy changes impacting 70,000 employees in North America

**Fortune 100 Global Petroleum:** Facilitated vision and communications strategy sessions with 12 clients to align on joint-venture initiative strategy and coached 2 HRVPs for a company-wide roadshow

**Fortune 100 Global Technology:** Conducted global working sessions to refine 9 activity areas, created and scored activities against criteria resulting in the identification of 49% of activities for centralization

**Fortune 500 Global Foodservice:** Produced sizing model and organizational and team structure for 5 global business services sales regions with anticipated cost savings of ~\$40M–\$50M

**Fortune 500 Global Pharmaceutical:** Advised Global Head of HRIT on Change Strategy in preparation for an acquisition

**Fortune 500 Global Pharmaceutical:** Designed an adoption strategy for 4 global regions to use a Multi-Channel Relationship Marketing approach with anticipated cost savings of ~\$5M

**Fortune 500 Global Consumer Goods:** Developed change strategy for GBS process transformation across 4 global regions

**Private National Insurance:** Facilitated sessions with 6 Leads, 1 Manager, and 3 Analysts across the business and IT to assess and define the roles and responsibilities for the analytics department

**Global Non-Profit:** Designed and built a workforce planning program for an organization operating in over 45 countries

## **EDUCATION**

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Master of Arts in Industrial-Organization Psychology

Certified Professional in HR (SHRM-CP)

INSEAD Business Strategy

INSEAD Dynamics in the C-Suite

# Meg Sayre, M.A.

Human Capital Manager | Project Management Office & Organizational Change Management

Meg Sayre has managed projects with private sector companies and international nonprofits, ranging from wholistic organizational assessments, to area-specific evaluations, social marketing campaigns, curriculum redesign, sales initiatives and organizational development projects. On every project, Meg ensures that all stakeholders are informed and that their inputs are considered and included throughout the process to ensure effective and timely delivery.

## PROJECT EXPERIENCE HIGHLIGHTS

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**Manufacturing:** As Head of Operations, Meg oversaw the daily business activities of the company, managed projects across 5 divisions, and coordinated with an international partner and 15 international resellers.

**Non-Profit:** Managed 19 staff members and reviewed strategic documents to generate actionable recommendations to improve professional development. Maintained consistent communication with both the Vice President of Community Investments and the CEO throughout the project. Presented findings and recommendations to the executive leadership team for a go/no-go implementation decision.

**Non-Profit:** Managed 4 local partners and 5 international partners to create a social marketing campaign supporting a global initiative to reduce neonatal mortality.

**Non-Profit:** Managed a team of 5 members in the design and implementation of a performance evaluation system to measure program effectiveness and generate recommendations for improvements.

**Non-Profit:** Conducted an organizational assessment to evaluate the mission, vision, values, culture and structure of the organization and generated concrete recommendations for improvements.

**Legal:** Managed client portfolio, carried out court filing, docket and legal research, led data compilation and analysis, managed day-to-day accounting operations.

## EDUCATION

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Master of Arts in Public Administration

# Randy Gardiner

Organizational Strategy Consultant | Organizational Objectives and Key Performance Indicators

Randy Gardiner has nearly 40 years in executive-level strategic planning roles. Randy advises CEO's and their executive teams with a proprietary strategic planning process to implement 21st century best practices to lead in the markets where they operate. He brings a wealth of experience in business leadership and strategic thinking from 25 years as CEO for a \$130M global engineering, manufacturing, and distribution company. Randy has led business development and strategic planning initiatives around the world.

## PROJECT EXPERIENCE HIGHLIGHTS

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**Government:** Led the strategic planning process to rapidly deploy product development and production to support the US Military. Executed a strategic planning process to increase production by 300% in 6 months.

**Global Sales:** Led the strategic planning process for the expansion of aftermarket sales through growth of the product line, cataloging, promotion, and development of a national distribution network. Grew sales from \$900,000 to \$34 Million.

**Global Manufacturing:** Led the strategic planning process for an international business expansion, establishing operations in the UK and China, and developing exceptional market expansion in India and Australia. The company's brand name now dominates the industry marketplace in both India and Australia.

**Global Manufacturing:** Led a lean manufacturing initiative for a 20-year old operation. Decreased lead time from three weeks to one-week, increased sales per employee by 100%, and doubled the price per share.

**Fortune 100:** Led the strategic planning and implementation process to take the company from the United States into a foreign market. Sales doubled over a two-years.

**Global Manufacturing:** Led the acquisition of a company who had key assets to support 10% of the business revenue. The acquisition allowed the company to operate as one of two key suppliers for a Fortune 100 for 15 different products.

## EDUCATION

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Bachelor of Business Administration

# Jevon Powell, Ph.D.

Organizational Psychology Consultant | Performance Management

Dr. Jevon Powell's experience spans more than two decades and over 75 different client organizations. Dr. Powell has coached hundreds of executives, managers, and supervisors. He has worked on consulting and organizational development projects in both public and private institutions. He has supported projects ranging from organizational restructuring to long-term culture change initiatives. He has also worked with dozens of teams, helping members work better together to accomplish goals. He is a skilled facilitator who has worked with dozens of teams on strategy, organizational development, business planning, and change management. He has developed and delivered dozens of training modules to thousands of employees and students in topics such as Change Management, Transformational Leadership, Communication, Project Management and Group Problem Solving. The central point of Dr. Powell's work is helping clients see things from new perspectives and asking provocative questions that lead to new insights and new behaviors.

## PROJECT EXPERIENCE HIGHLIGHTS

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**Government:** Led the State's Department of Labor and Industries (L&I) agency leaders through a large-scale change management project called "Claims Evolution" designed to reform how L&I handled claims. The project included organization design, executive coaching, training, multiple complex deliverables including a computer-based training program, and more. A major component of the work involved evaluating the current state of the 22-month training and development program for adjudicators. We also created a comprehensive culture change roadmap complete with developing and delivering training materials to hundreds of supervisors and managers.

**Government:** Led a performance management project for a county's Public Health's Local Hazardous Waste Management Program. A major component of the work was a custom-designed training for supervisors in which we taught performance management, communication skills, facilitation, and meeting management techniques among other topics.

**Government:** Led the management team through the redesign of the county's Water and Land Resources Division organization structure and to create a change management plan that included communications, stakeholder engagement, and governance structure. Project also included performance management, coaching, and team building.

**Government:** Led the management team through the redesign of the State's Department of Health organizational structure and created a change management plan that included

communications, stakeholder engagement, and governance structure. Project included support in implementation. Project was amended to include coaching and team building.

## **EDUCATION**

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Doctor of Philosophy in Industrial-Organizational Psychology

Licensed Psychologist, State of Washington

Certified 360 coach for Center for Creative Leadership



# Alexandra Petruzzelli, M.A.

Human Capital Manager | Client Feedback

Alexandra (Allie) Petruzzelli has led over 20 consulting projects in the areas of human resource management, organizational development, and survey work. Allie has a strong background in project management and statistical analysis.

## PROJECT EXPERIENCE HIGHLIGHTS

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**Fortune 500 HR Software:** Reviewed the statistical analyses and results in a study report prepared by the client.

**Fortune 500 HR Software:** Analyzed validation data and prepared final report to determine the relationship between several client-selected attributes and outcomes of performance and turnover.

**Private Ambulance Service:** Developed and administered an employee engagement survey. Qualitatively coded data from two open-ended survey questions with over 2000 employee responses. Prepared report for client summarizing the qualitative results.

**Private Ambulance Service:** Developed and administered an organizational climate survey. Analyzed quantitative data from 500 employee responses and prepared a report for the client summarizing the overall results and results by department.

**Private HR Software:** Wrote 20 attention to detail items to be used in a selection assessment for emergency call dispatchers.

**Private HR Software:** Led project team in analyzing turnover data from 119 EMS organizations and prepared final report of the results.

**Private HR Software:** Developed, administered, and analyzed a second EMS turnover study to investigate any changes one year after the first study (discussed above).

**Private HR Software:** Conducted literature search and prepared review with guidance on the use of physical ability tests in selection assessments.

**Private HR Software:** Developed 20 situational judgement test items to be used in a selection assessment for EMS health and safety officers.

**HR Software:** Rated 500 employee transcripts along several dimensions of persuasive communication for the client to use to develop an algorithm.

**Pharmaceutical:** Developed 10 survey items to assess employee understanding and support of a new strategic business plan.

**Pharmaceutical:** Qualitatively coded 300 employee responses to open-ended survey questions about a new business operating model. Prepared deck summarizing the qualitative results for the client.

**Pharmaceutical:** Qualitatively coded 240 employee responses and summarized results to provide the client with feedback about a recent meeting.

**Pharmaceutical:** Wrote behaviorally anchored rating scale items based on client competency model to be used in performance appraisals at the Individual Contributor, Manager, and VP and Above levels.

**Manufacturing:** Served as notetaker in several focus group sessions and assisted with preparing a validation report of training assessments.

**Manufacturing:** Analyzed quantitative data from an annual engagement survey and prepared a final report of the results.

**Public Sector:** Developed written exercise to be used in a selection assessment for police sergeants.

**Non-Profit Education:** Developed a survey, analyzed responses, and prepared final reports to evaluate the effectiveness of their program.

**Non-Profit EMS Certification:** Wrote task and KSA statements for three Provider Impressions (OBGYN, Sexual Assault/Rape, Vaginal Hemorrhage)

**International Public Management Association for Human Resources:** Writing and reviewing math, reading, and mechanical comprehension items for an entry-level maintenance worker exam.

**Private HR Consulting:** Wrote cognitive ability test items to be used in various selection assessments developed by the client.

## **EDUCATION**

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Master of Arts in Industrial-Organizational Psychology

# Shannon Drohman, M.S., CCP, SHRM-SCP, CMHR

Human Resources Consultant | Classification

Shannon Drohman has worked in human resources for over 25 years. With an emphasis on total rewards, she has developed compensation strategies and designed comprehensive total reward programs as an internal partner and external consultant. Her clients have ranged in size from small start-ups to over 10,000 employees, in a variety of sectors including government, education, non-profit, manufacturing, technology, health care, forest products, engineering, fisheries, and professional services.

Shannon is a past instructor for the University of Washington's Human Resources Certificate program, teaching compensation principles to HR professionals. She is a frequent presenter on HR and compensation topics for HR and other professional associations, including for the Northwest HR Management Association's HR Academy. In addition, Shannon co-created the Foundations of Compensation course for the Society for Human Resources Management (SHRM). She was Board Member and President of the Lake Washington Human Resource Association, one of the largest SHRM affiliates in the United States.

## PROJECT EXPERIENCE HIGHLIGHTS

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**Government:** Reviewed existing city/county classification system design and recommended changes to better meet the future needs of the 11,000+ employee organization and align with best practice

**Government:** Created a new classification and compensation system, developed new job family/level matrices and classification tools for a city with over 10,000 employees

**Government:** Utilized job content questionnaires and interviews to consolidate position descriptions (PDs) by 10% and update PDs for a public-school district with over 8,000 employees

**Government:** Conducted job analysis interviews, and consolidated positions descriptions (PD) by 10% and revised PDs for a city government with over 3,000 employees

**Non-Profit:** Created a new position description template, and consolidated position descriptions (PDs) by 15% and revised PDs for a non-profit with over 3,000 employees

**Non-Profit:** Developed a new classification and compensation system, created new job family and job level definitions, and recommended position description consolidations of 20% for a non-profit with over 3,000 employees

**Various:** Developed or revised classification and compensation systems, updated classification specifications and position descriptions for multiple agencies ranging from 75-500 employees.

## **EDUCATION**

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Master of Science in Human Resources

Certified Compensation Professional (CCP)

Senior Certified Professional in HR (SHRM-SCP)

Change Management in HR Certification (CMHR)

## SUBMITTAL FORM F – Subcontractors

Please complete the below form if using subcontractors. During contract negotiation, the state may require a signed written statement from each subcontractor that clearly verifies the subcontractor is committed to performing the services required by the contract. Prior to contract award, the state will also require evidence that a subcontractor possesses a valid Alaska business license if they will be performing work within Alaska.

Subcontractor Function	Subcontractor Name	Address	% of Work Performing
Organizational Strategy & Key Performance Indicators (KPIs)	Bonair, LLC	1715 Sunset Ave SW Seattle, WA 98116	5%
Performance Management	Scontrino-Powell, Inc	9605 Fauntleroy Way SW Seattle, WA 98136	4%
Client Feedback	Organizational Effectiveness Research Group	354 Wiecking Center Mankato, MN 56001	9%
Classification	Compensation Connections, LLC	8830 Norman Ave SE Snoqualmie, WA 98065	31%
Program Design	Center for Organizational Research	302 E Buchtel Ave Akron, OH 44325	4%
Media Production	Ridgepoint Aerial Imaging, LLC	401 Broadway Suite 100 #94566 Tacoma, WA 98402	4%