

City of Fort Lauderdale

Proposal For:

Consulting Services for Visioning Project

October 20, 2010

RFP # 705- 10541



Statement of Qualifications

Understanding of Critical Issues

The City of Fort Lauderdale has a need to put into place a framework for organized growth and sustainability of the City and its citizens and visitors.

Current challenges include:

- Depressed economic conditions
- High unemployment
- Public Transportation and Roads
- Tourism Fluctuations
- Preservation of green space & related funding
- Diversity of businesses and population
- Decrease of property tax base

The Consultant chosen to develop the Visioning plan will be responsible for working with designates of the City of Fort Lauderdale along with meeting with other interested parties including the Committee, business, civic organizations, religious institutions, non-profit entities, governments, educational groups, community members of all ages, elected officials, City of Fort Lauderdale management/staff, homeowner associations, community and selected regional organizations.

The purpose of these meetings is to perform both a gap and SWOT (strengths, weaknesses, opportunities, threats) analysis. The team will meet with these various groups will be to determine what programs and services are working or not working, what concerns the groups have, what their visions are for the future of the City, and what actions need to take place to achieve visions.

It will be the consultant's job to collect and distill the information in such a way to be able to develop a meaningful plan of action and recommend priorities along with developing an "existing conditions" report which will serve as a benchmarking tool and status report for any programs or services that may be currently underway.

Qualifications

The team of The Curtiss Group is uniquely qualified for this project. The team represents over 100+ of collective experience serving the business community as both employees and consultants with from international manufacturing, utilities, healthcare, insurance, hospitality, telecommunications, food & beverage, and financial services.

➤ **See Tab 5 for resumes**

Preliminary Scope of Services

Month 1

- Meet with Visioning Committee to insure clarity of goals & objectives of visioning project
- Develop standardized questionnaire for group meetings
- Collect information on current programs/services planned or underway
- Develop checklist of all groups to be met with
- Determine what funds, if any, are currently available for implementation of program(s)
- Schedule meetings with designates of the City of Fort Lauderdale management/staff, business, civic organizations, religious institutions, non-profit entities, governments, educational groups, community members of all ages, elected officials, homeowner associations, community and selected regional organizations
- Issue Report to Committee on Project Status

Month 2

- Conduct meetings with designates of the City of Fort Lauderdale management/staff, business, civic organizations, religious institutions, non-profit entities, governments, educational groups, community members of all ages, elected officials, homeowner associations, community and selected regional organizations
- Begin to distill collected data
- Submit progress report to committee

Month 3

- Complete meetings with City of Fort Lauderdale management/staff, business, civic organizations, religious institutions, non-profit entities, governments, educational groups, community members of all ages, elected officials, homeowner associations, community and selected regional organizations
- Distill collected data
- Prepare and present report to Committee
- Obtain Committee approval to proceed with project.

Month 4

- Develop priority list and action plans for the following areas:
 - Community Identity/Image/Attitude
 - Economic Development
 - Education
 - Government
 - Infrastructure/Transportation
 - Marine Interest and Industries
 - Public Safety
 - Quality of Life/Neighborhoods/Parks/Recreation
 - Tourism Interests and Industries
- Review collected data to assure accurate reporting
- Meet with Committee to assure concurrence in priorities
- Assist in development of budgets with Committee
- Identify outside funding sources
- Identify sources for volunteer efforts and in-kind gifts/supplies

Month 5

- Make any necessary revisions to preliminary Visioning report
- Develop goals and benchmarking calendar
- Meet with Committee to do last review and revisions to Visioning Report

Month 6

- Deliver Visioning Report to Committee at the end of Month 6.



Experience

The Curtiss Group's team of experts combines more than 100 years of experience in developing strategies for all types of industries including manufacturing, banking, utilities, nonprofits, retail, financial services, and aviation, among others. Additionally, several of our professionals possess experience with global organizations and have served in capacities outside the United States.

We have had the opportunity to work on a number of visioning and visioning-type programs.

Visioning

Type of Business: Pediatric Nonprofit

Situation: This small nonprofit wants move up to the next level in terms of public awareness and funding.

Action: Held a series of 3 brainstorming sessions with core group of board members and volunteers to identify opportunities for public relations and activities to enhance public awareness as well as new funding sources.

Results: Planned (4) additional events raise funds and public awareness. Also identified additional funding sources, both grant related and private sector funding.

Similar type projects that have been executed by The Curtiss Group include, but not limited to, Strategy, Business Planning, Performance Management, Organizational Structure and Culture, Change Management, Human Capital Management and Governance. Examples of each of these projects follow for your reference.

Strategy Project Examples

The types of strategy The Curtiss Group has includes developing organizational charts, job descriptions, team alignment or re-alignment strategies, business continuation strategies, succession planning, and personal development plans.

Type of Business: Educational Institution

Assisted in the development of administrative Job description, alignment of educational staff at each of the campuses, redirection, and creation of marketing strategy.

Situation

Small school system that had grown rapidly yet faced growth challenges in a very competitive environment

Action: Interviewed all persons in leadership, cross section of parents in current population; conducted an external study to identify competition, what market was

Action, Continued:

seeking, how the school was viewed externally; reviewed all documentation (publications, marketing material, organizational structure and governance)

Result: Created job descriptions... Successfully restructured the entire organization that led to greater productivity/performance... Created a 5-year strategic plan that included increasing funding/enrollment and student and parent involvement.

Example #2

Type of Business: Financial Institution

Situation

In Early in 2008, Chief Information Officer (CIO) and key member of senior management retired unexpectedly. The financial institution found itself with an immediate need for an experienced senior technology executive who could step into the role of CIO, manage the information technology (IT) organization, and seamlessly meld into the senior management team. Executive management determined that a seasoned and experienced financial services CIO was essential in maintaining the momentum of critical development projects.

Given the importance of technology to the bank and the tumultuousness of the financial landscape, executive management and the board decided that they needed three things: 1) Immediate senior management assistance, 2) An independent evaluation of the institution's entire IT service portfolio and 3) Guidance in recruiting the right individual who would become their CIO of the future.

In short, they wanted help and they needed answers to questions that would be difficult to ask without an objective, third party evaluation. Was IT responsive to serving the needs of the bank? Could IT take the bank forward into the future? What kind of CIO was right fit?

Action

Work began immediately with an extensive series of interviews and meetings with senior executives and upper levels of IT management. During the assessment observations were made on how departments worked with each other and how real-time data could enhance decision-making.

Performing the IT assessment while running the department provided an intimate level of insight into what was really happening within the organization.

Results

Interviews allowed us to validate the ideas, thoughts and perceptions of the executive team, and formulate a blueprint for improvements in the Bank's day-to-day operations and overall technology strategy.

Customer service became a priority for IT, responding swiftly to requests and help desk issues. Expecting delivery of software projects with zero defects--and delivering on this expectation became the norm and real-time architecture was specified and deployed.

and as IT governance was refocused from a day-to-day activity to one that now helps us manage the bank's strategic future. Developed the permanent CIO job requirements and assisted the bank with the selection process. In early 2009, the bank hired a permanent CIO.

Planning Expertise Examples

Planning

The Curtiss Group's experience has assisted organizations in all types of planning events including, but not limited to, planning and executing strategies, succession plans, downsizing events, training seminars and individual coaching sessions.

Example #1

Type of Business: Publicly Traded Company

Situation

Assisted a publically traded company in developing a succession plan as they faced the retirement of two top executives.

Action

Used a five-step process to assist the organization and board to identify a pool of talent capable of filling the positions being vacated by retiring executives. The five steps utilized were:

1. Defined the Organization's Needs

Worked with the leadership to identify key jobs that will need to be filled as well as others that needed to be filled at selected future points in time. These jobs are based on a consideration of the organization's strategy and the structure that will make the strategy possible.

2. Review Capability of Employees.

Using a talent capability assessment based on the organizations competencies for success we reviewed all individuals at selected levels in the organization and identified those who have the capability to be considered for key jobs. Individuals who will be able to fill other jobs are also identified. This provided the organization with a clear understanding of gaps in their current talent pool.

3. Identify Jobs that Specific Individuals May be Able to Fill

this step has two parts. The first is to identify jobs for which potential candidates are sought. The second is to look at the employees who are judged able to move into these jobs and identify one or more possible jobs for these individuals.

4. Establish Developmental Plans

Assisted the organization to create a process to establish and carry out development plans for the selected individuals that will prepare them for the roles for which they are being considered.

5. Review the Total Talent Pool

Provided ongoing information on all employees at selected levels compiled through the use of tools/assessments we provide. Objective was to identify any deficiencies or potential problems. Plans were made to deal with these issues from an overall organizational perspective.

Results

Organization was able to successfully transition to new leadership in two key roles (President and CFO) without losing focus or significant disruption to the day-to-day operations.

Example #2

Type of Business: Manufacturing

Align workforce needs with business productivity needs

Situation

Our client is a high-end server manufacturer who had more than 1,000 skilled employees on long-term contracts working a standard 9-5 week. But market conditions necessitated a more flexible production schedule – at the same time, the company did not want to lose its in-house expertise in the face of change.

Action

We were hired to help the company allocate talent more appropriately, increase the flexibility of the production process, and increase production efficiency. To accomplish this, we took over the entire human resources function and managed all workforce-related aspects of the production process.

We also implemented a broader business-transformation process to transition staff from fixed weekly shift patterns to a fully flexible environment.

Result

The client experienced a 30% increase in the availability of suitable personnel, and enjoyed improved manufacturing productivity.

Example #3

Type of Business: Global Communications

Effectively redeploy talent from one part of the organization to another

Situation

Trying to remain competitive in a dynamic industry, this global communications leader was hiring in one part of the company at the same time it was downsizing in another.

Action

Because The Curtiss Group was currently providing the client with career transition services on an ongoing basis, we were able to identify the inefficiencies in their hiring trends and conceive a solution that would deliver cost savings through a more targeted re-employment process. The goal was to ensure that the right people were considered for the right roles in the organization. To achieve this, we designed a flexible process that connects internal candidates with hiring opportunities with greater speed and accuracy.

We also provided quick-start sessions to prepare candidates for interviews and facilitated telephone or in-person interviews for candidates around the country –

Results

In one three-day period, more than 400 interviews were scheduled, resulting in 59 offers and 51 acceptances. In 2008, this new process saved the client an estimated US \$2.4 million in direct costs that would have been spent on severance and hiring from outside the organization.

Performance Management Expertise

Example #1

Type of Business: Shipping Industry

Improve the way our leadership teams work together

Situation

With 4,000 employees spread across 30 states, this shipping company wanted to institute a “one team” approach in all locations. To accomplish this, the company realized it needed to align the diverse leadership population to the core values of the organization.

Action

The Curtiss Group was hired to help create a leadership team development process, with a new Leadership Model as its nucleus. We instituted a 360-degree feedback process that enabled individuals to describe themselves as leaders and better understand the way they interact with one another. Next, we facilitated team sessions in all locations, including Latin America.

Example #1 Continued:

Result

The process culminated with the creation of personal development plans for each leader, and action plans for the team. The top 40 leaders also received leadership coaching. Initial results from this ongoing process include an enormous improvement in awareness, more positive attitudes toward personal leadership development, and real changes in leadership behavior and authenticity.

Example #2

Type of Business: Wire & Cable Industry

Effectively and efficiently assess and develop key talent

Situation

Having implemented a new business strategy, one of the world's leading businesses in the wire and cable industry needed to fill three new sector president positions. With eight highly successful candidates in its top management team, the client sought The Curtiss Group's assessment expertise to help identify the individuals most capable for the positions.

Action

With the client relationship spanning 10 years, The Curtiss Group understood the company's core business strategy, and had even provided an executive development program for its top 200 leaders. This allowed The Curtiss Group to design a specific assessment and selection process to determine the most qualified candidates. Additionally, our consultants employed a world-renowned personality tool (leveraging its effectiveness for global use) along with other relevant exercises.

Result

Then, together, the client and The Curtiss Group consultants conducted structured interviews with each candidate. The entire process was completed in 11 days.

Example #3

Type of Business: Homebuilding Industry

Situation

A Houston-based homebuilding firm faced an escalation in turnover and a decrease in sales. Market share, productivity and survival were all in question. The market was there, but the company simply couldn't get to it with its sales-force in constant churn.

The firm's problems were the result of poor hiring decisions caused by a lack of understanding of the sales job. Hiring managers did not know what talents were necessary for success. The company faced dire consequences if they did not find a solution quickly. They needed help. And fast.

Action

The firm turned to The Curtiss Group, a TTI TriMetrix certified consultant, to help solve their problems. The consultant informed the management team that a successful salesperson at another company might not be as successful at theirs because of their unique culture and rewards system. He explained that because every company was different, sales-forces must also be unique. Experience couldn't tell them enough about future performance. They had to look deeper.

A solution was promptly implemented. The consultant began by benchmarking the sales job, which meant bringing all of the stakeholders together to analyze the job. By using validated tools and proven processes, he articulated how the job should be done. TTI TriMetrix allowed the consultant to use validated assessments that clearly identified what the job is asking for and what the candidate has to offer. These reports could easily be compared to show the correlation between the candidate and the job benchmark.

The next step was to begin developing targeted interview questions around the benchmark. The interview questions addressed specific needs the sales position required. Combined with the assessments, the interview questions delivered the perfect one-two punch to find superior performers for these sales positions.

Results

The homebuilding firm only hired top talent who could fix the company's problems. In less than one year, TTI TriMetrix reduced turnover by 75% and increased sales by 50%. After seeing the success of the system, the firm extended TTI TriMetrix into its homebuilding division and benchmarked every executive's position including the CEO. Widespread organizational improvement continues to this day, thanks to the knowledgeable consultant and TTI TriMetrix.

Organizational Structure and Culture Expertise

Organizational structure and culture are also key areas of The Curtiss Group's team of expertise. In previous projects, the assigned team has come into the client organization and evaluated what existing values, beliefs, customs, behavioral norms, and practices are shared by the organization's members.

In further investigation of previous clients, The Curtiss Group team has evaluated the strength of the culture, and the influence it has on the effectiveness of the organization. Optimally, our team recommends any needed changes that will encourage success among its members and have all members working toward the same goal(s).

Change Management Expertise

The Curtiss Group takes a structured approach to determining what components within the organization needs to be changed in order to take it from the current state to the desired future state. Changes that may be recommended can include any combination of the following: strategic changes, technological changes, structural changes, or changing the attitudes and/or behaviors of employees.

Our approach would include assessing the current attitudes, expectations and practices in place, followed by a plan to address the changes needed to shift from the current state to the desired future state.

Example #1

Type of Business: Office Furniture Manufacturing

Prepare managers and employees for organizational change

Situation

In order to maintain its leadership position in a competitive marketplace, a global office furniture manufacturer needed a nimble, fully engaged workforce to facilitate a large-scale change strategy for more streamlined manufacturing, technology, and people processes. We were hired to develop a program to help managers and employees understand the changes and be positioned for success in a company with new talent requirements and expectations.

Action

We designed a two-tiered solution that dealt with managers and employees separately, based on their different needs. We helped managers develop essential change

Example # 1 Continued:

leadership skills and learn to manage career decision conversations with their direct reports.

We also worked with employees to assist them in successfully navigating change and managing their careers, leveraging our workshops, coaching, and redeployment or transition services as needed.

Results

Surveys conducted before and after the program was introduced found a 60% increase in the number of managers who feel ready to lead change; an 80% increase in the number of employees who are confident in their ability to adapt to change and increase their personal effectiveness during that time.

Example #2

Type of Business: Finance & Investment Industry

Align our workforce plans with changes in our organizational and business strategy

The combined impact of business volatility and regulatory changes in the finance and investment industry led this S&P 500 client to make internal changes in order to position itself for future growth. The CEO needed to align his largely untested senior leader team around the new business strategy.

To accomplish this, we were asked to create a forum for dialogue among the team members. We proposed a process focused around our proprietary strategic alignment tool that also included facilitated group sessions that enabled participants to identify, prioritize, and align talent initiatives specific to achieving the new business strategy. Senior leaders were able to reach a common understanding of their responsibilities for managing change, and pinpoint the skills development that field managers would need to handle the new expectations they faced. The CEO found the initial session of the process so valuable that he asked us to expand this step and include additional leaders in the organization.

Example #3

Type of Business: Technology Manufacturer

Align workforce needs with business productivity needs

Situation

Our client is a high-end server manufacturer who had more than 1,000 skilled employees on long-term contracts working a standard 9-5 week. But market conditions necessitated a more flexible production schedule – at the same time, the company did not want to lose its in-house expertise in the face of change.

Example #3 Continued:

Action

We were hired to assist the company allocate talent more appropriately, increase the flexibility of the production process, and increase production efficiency. To accomplish this, we took over the entire human resources function and managed all workforce-related aspects of the production process.

Results

We also implemented a broader business-transformation process to transition staff from fixed weekly shift patterns to a fully flexible environment. As a result, the client experienced a 30% increase in the availability of suitable personnel, and enjoyed improved manufacturing productivity.

Human Capital Expertise

Our team possesses the experience and is credentialed in a number of personnel assessment instruments in order to evaluate the current and future competencies and personality attributes of personnel. By initially evaluating existing personnel, recommendations and action plans can be put in place to develop personnel.

Example #1

Type of Business: Law Practice

Get a diverse workforce engaged around our company values

Situation

A law firm in a highly competitive market had grown through acquisitions, but the resulting cultural “melting pot” threatened the company’s reputation for customer

Example #1 Continued:

service. Upon launching a new external identity, the firm realized it needed to unify its workforce's awareness and behavior.

Action

The Curtiss Group began by delivering customer service workshops for the staff; after further consultation with the chairman and managing partner, our charge was expanded to "ensure that every staff member realized that he or she is absolutely critical to ensuring top-quality service for every client."

Example #1 Continued:

Results

We delivered on this need by identifying six values underpinning the firm's concept of service excellence, then coaching and training staff in the core behaviors that bring those values to life. We also delivered customized Brand Values Workshops, 360-degree feedback surveys, partner coaching, Core Skills workshops for staff and managers, career decision support, and a staff engagement survey.

Example #2

Type of Business: Consumer Goods

Increase retention, improve employee engagement, and help your workforce effectively manage their careers

Situation

A global consumer goods company was experiencing growing retention problems in one of its largest divisions – primarily among those employees who had been in the same role for approximately two years. Recent downsizing at the top and bottom levels of the organization had resulted in an unprecedented increase in lateral movement across the company, and an internal survey showed continuing low employee engagement scores.

Action

The client wanted us to help create an organizational shift that would motivate employees to become more proactive and successful in managing their own careers. The goal was to increase employee engagement and retention throughout the division. The Curtiss Group delivered a branded version of its Career 24/7 career management program. The program features three components: online assessments, a facilitated workshop, and individual one-on-one coaching.

Example #2 Continued:

Result

To date, 24/7 has been implemented division-wide to several hundred employees. The client has reported that attrition rates of those who participated is less than half of that date, the firm is tracking a 10% revenue increase and 5% gross profit increase.

Example #3

Type of Business: Global Consumer Goods

Increase retention, improve employee engagement, and help your workforce effectively manage their careers

Example #3 Continued:

Situation

A global consumer goods company was experiencing growing retention problems in one of its largest divisions – primarily among those employees who had been in the same role for approximately two years. Recent downsizing at the top and bottom levels of the organization had resulted in an unprecedented increase in lateral movement across the company, and an internal survey showed continuing low employee engagement scores.

Action

The client wanted us to help create an organizational shift that would motivate employees to become more proactive and successful in managing their own careers. The goal was to increase employee engagement and retention throughout the division. The Curtiss Group delivered a

Action (Continued)

branded version of its Career 24/7 career management program. The program features three components: online assessments, a facilitated workshop, and individual one-on-one coaching.

Results

To date, 24/7 has been implemented division-wide to several hundred employees. The client has reported that attrition rates of those who participated is less than half of the company's average, yielding a rate of return on investment in excess of 300%.

Governance Expertise

Governance consulting aligns with other management consulting activities implemented by The Curtiss Group. Our experience includes going into organizations and evaluating various aspects of the business, evaluating if there is consistent management, cohesive policies, processes and decision rights for given area of responsibilities.

Type of Business: Eurasian Home Improvement Retail Operation

Situation

With the arrival of a new CEO, this leading Eurasian home improvement retail group faced a change in strategic direction, a downsizing of the corporate centre by more than 30%, and new expectations for the organization's core values to guide behavior change, convey direction and purpose, and communicate what was important.

Action

The Curtiss Group was hired to perform competency modeling and employee engagement services to ensure that the workforce was aligned with the new organization's objectives and values. We provided a pragmatic consultative approach – first working to understand the client's business style and the challenges and pressures facing the organization, and then conducting one-on-one interviews with all members of the Leadership Team to identify the three key issues that would drive development of the competency model. To support rollout of the new model, we facilitated workshops that made clear the link between the organization's values and performance management, and worked with general managers to ensure that the model made allowances for the differences in operations and cultural sensitivities for each country.

Results

The model provides the client with a performance management framework and a tool for coaching, essential to developing a high-performance culture.

Cost of Services

Pricing Structure

Pricing Structure:

A **Basic Approach** to this project would include the above actions, including Conducting focus groups, gathering information, distilling that information and providing a comprehensive report to the Committee.

- **Basic Total Project Cost Not to Exceed: \$65,000**

A **Moderate Approach** to this project would include The Curtiss Group's involvement in prioritizing and implementing recommendation action items in the report, and would include

The Curtiss Group's involvement in months 6 thru 12.

- **Moderate Total Project Cost Not to Exceed: \$85,000**

A **Comprehensive Approach** to this project would include The Curtiss Group's involvement in implementing recommended action items, establishing reasonable benchmarks for progress, and evaluating progress each project in months 12 through 24.

- **Comprehensive Total Project Cost Not to Exceed: \$105,000**



Those persons who will have a management position working with the City in the event The Curtiss Group is awarded the contract:

Tedd Simmons, Ph.D.
President/Owner

Project Duties: Overall project management and liaison with Committee & City of Ft. Lauderdale.

Will also participate in distillation of data and related reporting & planning, as well as formulation of recommendations to committee.

Simmons' professional background consists of over 20 years experience in leading initiatives focused on talent management, leadership development, succession planning, executive assessment and coaching.

Simmons is also experienced in facilitating sessions on management and leadership development, team development, problem solving, conflict resolution, change management and effective decision making. In addition to his wide range of training and development skills, which includes a key role with an internationally recognized consulting firm, Simmons is qualified to provide organizational development interventions that encourage companies to achieve their strategic focus. As a former executive for an international manufacturing company, his business experience, training and ability to communicate effectively with individuals at all levels help clients to increase overall performance.

Simmons earned his Ph.D. from Regent University with a focus in Organizational Leadership. He also holds two master's degrees and a B.A. from Anderson University. He is certified in many leadership and behavioral instrument and assessments.

Angela Horn, M.B.A.
Director, Client Services

Project Duties: Assistant Project Manager and Assistant Liaison with Committee and City of Ft. Lauderdale. Will also be responsible for scheduling and coordinator for focus group meetings, as well as distillation and reporting of data findings.

Horn's professional background consists of over 15 years experience in leading organizations in communications, training initiatives and coaching.

Horn's background includes extensive experience in working with diverse organizations including manufacturing, banking, healthcare, and mental health fields where she led a wide range of developing, implementing and evaluating training and communications programs. She also possesses additional experience as Professor of Communications at Middle Tennessee State University in Murfreesboro, TN. Horn earned her M.B.A. and B.S. in Communications at Middle Tennessee State University.



Octavio Vegas

VP, Business Development, Latin America Services

Project Duties: Facilitator of Community Focus Groups; will assist with any groups requiring Spanish language translation.

Octavio heads up our Latin America Services. He has accumulated an impressive track record in career transition consulting and coaching, along with building a broad base of knowledge in Talent Management strategies and concepts.

Octavio is recognized and respected as a senior recruitment and staffing consultant with more than 10 years of successful experience in recruiting "A" talent and developing career strategies. He has been an industry leader in developing hiring practice competencies, strategic staffing, interview strategies, and evaluation and selection techniques and is bilingual with proficiency in English and Spanish. Since graduating from the Monterrey Tech with a degree in International Business, he has held leadership roles for Coca Cola Mexico, Ford Motor Company and Hobert Pools.