How to Use the PRF65 Business Process Redesign (BPR) Statewide Contract

Contract #: PRF65	**Contract Duration:** June 22, 2015 through January 31, 2017
MMARS #: PRF65*	**Options to Renew:** None.
Contract Manager:	Jodi Paris Anastos, 617-720-3169, jodi.parisanastos@state.ma.us
This contract contains:	Prompt Payment Discounts (PPD), Supplier Diversity Program (SDP), and Small Business Purchasing Program (SBPP)
UNSPSC:	80-10-00, 80-11-00, 80-16-00
Last change date:	**August 1, 2016**

Contract Summary

The purpose of this Business Process Redesign contract is to provide a list of prequalified vendors to assist Executive Department Agencies with organizational and business process redesign through end-to-end consultation and/or training and coaching support. There are three categories of service available to departments depending on the depth and breadth of their needs. All contractors on this contract have varying experience in areas of BPR, Talent Management, Change Management and Organizational Design.

Departments choosing to use this contract must submit their proposed improvement initiative through their respective Cabinet Secretary according to the following process:

Each Cabinet Secretary will pass along the improvement initiatives that they support to a BPR Committee that the Governor and Secretary of ANF have established to assist secretariats and agencies in selecting the vendor(s) from the BPR Statewide Contract. The BPR Committee will focus on matching vendors whose services most closely align with the proposed work. Departments will establish a Statement of Work (SOW) and choose a vendor or vendors that they determine best matches their needs. See Appendix 2 Business Process Improvement (BPI) Planning documents and sample SOW form for guidance on developing a comprehensive SOW.

Benefits and Cost Savings

- Opportunity to assess department business processes, and foster innovative thinking
- Realign business processes to continuously improve department activity to achieve their mission
- Varied types of contractors with unique approaches to BPR allow departments to custom match their needs to the right contractor.

Who Can Use This Contract?

Applicable Procurement Law: MGL c. 7, § 22; c. 30, § 51, § 52; 801 CMR 21.00

Eligible Entities:

01. Cities, towns, districts, counties and other political subdivisions
02. Executive, Legislative and Judicial Branches, including all Departments and elected offices therein;
03. Independent public authorities, commissions and quasi-public agencies
04. Local public libraries, public school districts and charter schools;
05. Public Hospitals, owned by the Commonwealth;
06. Public institutions of high education
07. Public purchasing cooperatives;
08. Non-profit, UFR-certified organizations that are doing business with the Commonwealth;

Pricing and Purchase Options (All Categories)

Purchase Options:

Departments are advised to review the detailed information on the contractors recommended to you by the BPR committee, provided in Appendix 1, Awarded Contractor Overview, organized alphabetically by contractor. The Appendix briefly describes each Contractor's expertise, experience, and proposed approach to BPR. The complete contractor proposed approach to BPR and Ceiling Pricing documents are posted as attachments to each contractor's Master Blanket Purchase Order (MBPO) in COMMBUYS. MBPO numbers are also included in Appendix 1. Once Departments receive their BPR committee vendor recommendations, they may take advantage of the BPR team's expertise, if needed, in developing a Statement of Work (SOW) that describes their particular need. Appendix 2 Business Process Improvement (BPI) Planning documents will help you to think about and define what you need, and can be used as the basis of the final SOW. Appendix 2 also contains a sample SOW that may be used to memorialize the agreed upon Statement of Work under the terms of the contract. Departments may choose a single contractor that meets their needs, or they may submit their SOW to multiple vendors on this contract. **NOTE** If departments are using Capital IT bond funds, they must submit their SOW as an RFQ to the subset of vendors on the list who have the desired specialty as indicated in the chart on Page 5 of this Guide. Given the specific nature of each department's needs, it is expected that both the contractor's approach to the SOW and the pricing for the work to be done will be negotiated by the department in order to achieve best value.

Pricing and buying details:

All prices listed are ceiling prices and may be negotiated. Pricing information by vendor is available on COMMBUYS under each PRF65 MBPO; see Appendix 1 for contractor MBPO information. All orders placed under this contract must include the following statement: "This order is placed under Statewide Contract PRF65". In addition it is required that the following language be included in each SOW: "All of the terms and conditions of the Statewide Contract PRF65 are incorporated herein and made a part hereof. Conflicting or additional terms, conditions or agreements included in or attached to this form shall be considered to be superseded and void."

Additional Information

The following tables describe each category and the services available within that category. Appendix 1 identifies all awarded contractors, the category awards they received, and a brief overview of their experience and approach.

Category B. Organizational Design Support/Coaching:

Agencies may choose to avail themselves of specialized support in targeted areas of need around the organizational design process. Contractor specific details are attached in Appendix 1. Examples of the types of coaching support available are:

Service	Description
Organizational design	Focused consulting on specific aspects of the process.
Coaching	Focused on coaching.
Business Process Redesign Coaching	Focused on BPR.
Talent Management Coaching	Assist agency leaders and HR professionals in identifying and assessing required competencies.
Change Management Coaching	Assist agency leaders with developing change management strategy for implementing organizational and business process redesign.
Miscellaneous Executive Coaching	Meet with leadership on limited basis for related management issues.

Category C. End to End Organizational Assessment and Design:

The awarded contractors will work closely with agency leadership on their specific organizational design and development needs. This category is intended to focus on a broader, end to end need, and typically would encompass a department as a whole, though it could be used for various division assessments and design needs as well. Typical areas covered in this category are:

Service	Description
Organizational assessment	Interviews, data collection, review of documentation.
Strategic organizational and workforce planning	Identification of strategic goals, values, optimal workflows, and aligned talent needs.
Organizational and process design	Identify optimal work and business process flows, align organizational structure with optimal work flows, talent needs, strategic goals, and values.
Talent Management	Identify needed competencies, assess existing talent against needs, create development plans for existing talent.
Change Management --Ramp up to implementation	Lead the implantation of organizational and process redesign, and talent development, including risk management, communication, and stakeholder work.
Change Management --Ongoing implementation	Continued intermittent support through the 6 month-1 year following initial implementation.

Category D: Contractor Alternative Offerings:
Bidders were invited to offer alternatives to the above category submissions so that the Commonwealth could take advantage of other innovative approaches to Organizational Assessment, BPR and workforce planning. Many of the awarded contractors did offer alternative approaches, and you can find the details on COMMBUYS where their full bid submission can be found.

Where to Find Contract Information on COMMBUYS

There are 14 vendors on this contract and each vendor contract has been assigned a unique Master Blanket Purchase Order (MBPO) number. Vendor ceiling prices and award details are located in the attachments tab on each vendor's MBPO. See Appendix 1 of this User Guide for more detail.

Strategic Sourcing Team Members

Name	Organization	Email Address
Lorraine Barton	DCAMM	Lorraine.Barton@state.ma.us
Marianne Dill	HRD	Marianne.Dill@state.ma.us
Breean Fortier	GOV	Breean.Fortier@state.ma.us
Matthew Hale	HRD	Matthew.Hale@state.ma.us
Kathleen K. Reilly	OSD	Kathy.Reilly@state.ma.us
Tom Simard	DDS	Thomas.J.Simard@state.ma.us
Adam Weikel	GOV	Adam.Weikel@state.ma.us

Awarded Vendors PRF65

Vendor	Organizational Design Training and Tools: Single Award	Organizational Design Support Services	End-to-End Organizational Assessment Design	Bidder Alternative Offerings
Accelare		X	X	X
Accenture		X	X	X
Aleen Bayard		X	X	
Christine Swistro (Small & WBE)		X		
Gartner		X	X	
KPMG		X	X	
Longpoint Consulting		X	X	
The Lewin Group		X	X	X
RSM US LLP		X	X	
McKinsey & Company	X	X	X	X
MetaView		X		
Public Consulting Group		X	X	
Right Management		X		
The Ripples Group			X	

Appendix 1

Awarded Contractor Overview

Contractor: Accelare

MBPO #: PO-16-1080-OSD03SRC-00000004921

Awarded Categories:

- Category B, Organizational Design Support
- Category C, End-to-End Organizational Assessment and Design
- Category D, Alternative Offering to the Categories B or C Scope of Services Needed

Overview, excerpted from the RFR Response:
Accelare, Inc. is a Massachusetts firm dedicated to the creation of and global adoption of the Strategy-to-Execution Process™ and Enterprise Fitness™ - the ability of an organization to Run, Improve and Transform simultaneously. Accelare also offers a management collaboration software-as-a-service offering called WorkFit™ which is built on Microsoft Sharepoint™ to create a collaboration framework for governance of a modern capability-based organization.
Strategy-to-Execution Process and Operations Innovation Accelare is dedicated to helping organizations institutionalize the Strategy-to-Execution Process, a process which links Mission, Vision, Blue Ocean™ Value Innovation based strategies, contemporary capability-based operating models, business process reengineering and engaged high-performance organizations in creating new and improved products, services and experiences for customers. A Blue Ocean strategy is one which creates higher customer or buyer value and lower cost. The key difference between Accelare's response and other bidders is that Accelare does not view this as a project nor would Accelare recommend using the organization chart as the primary framework to develop or assess a modern business model. The Accelare approach is different and has much more lasting value to the Commonwealth of MA.
Accelare frames this challenge not as reorganizations and BPR one-time project work but as institutionalization of a new business process, a process which is currently missing in the Commonwealth's Agencies and in most commercial businesses running today. We call this process The Strategy-to-Execution Process™. Accelare will help OSD to develop a uniform S2E Process which links vision, strategy, operating model, organization design, staffing, sourcing, technology, and other planning elements into a comprehensive and renewable planning and execution process. Accelare will help each Agency which adopts S2E to create high-performance organizations and high-value Blue Ocean business processes.
The goal of this work is to have Agency processes IMPROVE in both LOWER COST and HIGHER PERFORMANCE. The manpower costs will be lowered by this payroll savings and the reengineering actions associated with this project will further lower costs while improving service, customer experience and outcomes.

For more information on Accelare's history, approach offered to the Commonwealth and proposed ceiling pricing for services, please see the documents under the attachment tab for MBPO #: PO-16-1080-OSD03SRC-0000000492

Contractor: Accenture

MBPO #:PO-16-1080-OSD03-SRC3-00000004927

Awarded Categories:

- Category B, Organizational Design Support
- Category C, End-to-End Organizational Assessment and Design
- Category D, Alternative Offering to the Categories B or C Scope of Services Needed

Overview, excerpted from the RFR Response: Accenture is a global management consulting, technology services, and outsourcing company, with approximately 323,000 people serving clients in more than 120 countries. Accenture has offices and operations in 200 cities in the world, as well as more than 56 delivery centers in strategic locations. Accenture combines unparalleled experience, comprehensive capabilities across all industries and functions, and extensive research on the world's most successful organizations to help our clients become high-performance governments and businesses. The company generated net revenues of US$30 billion for the fiscal year ended Aug. 31, 2014.

Accenture has been operating as a corporate entity for more than 60 years—from the earliest days as a pioneer in the new world of information technology in the 1950s, to its position today as a Fortune Global 500 industry leader. Our clients are the world's leading companies and organizations, as well as government agencies around the world. Accenture serves 92 of the Fortune Global 100 and more than three-quarters of the Fortune Global 500.

Developing the skills and talent of our people, our client's, and our communities is at the heart of our business and is our core capability. As a professional services company, developing talent is what we do each and every day. In fact, we focus our global corporate citizenship program, Skills to Succeed, on people development. Skills to Succeed addresses the global need for skills that open doors to employment and economic opportunity. Through this program, we work with leading organizations, like Boston-based Year Up, to equip individuals with skills to get a job or build a business. We have equipped more than 800,000 people with these skills since 2010 and by the end of 2020, we will equip 3 million people globally with workplace and entrepreneurial skills.

Overview of Accenture's Approach

Accenture is proposing to offer our services in Categories A, B, C and D. Our approach in all categories is grounded in our field tested transformational framework, supported by industry leading tools and techniques, and delivered by functional Subject Matter Advisors and Industry luminaries with domain capabilities that align with the Commonwealth's lines of business.

In our experience, all organizations produce the results they were designed to produce and no others. The Act Relevant to State Employees provides the Baker Administration with a unique opportunity to fundamentally redesign the way in which the Commonwealth operates. Simply stated, this is the opportunity to transform the Commonwealth from a control oriented organization to a performance oriented organization. The tools outlined in the RFP (Organizational Design, Business Process Redesign, Talent Management, and Change Management) will be used to drive this redesign. To take advantage of this opportunity requires a commitment to rethink the core of the Commonwealth – its organizational DNA - as illustrated in Figure 1 below.

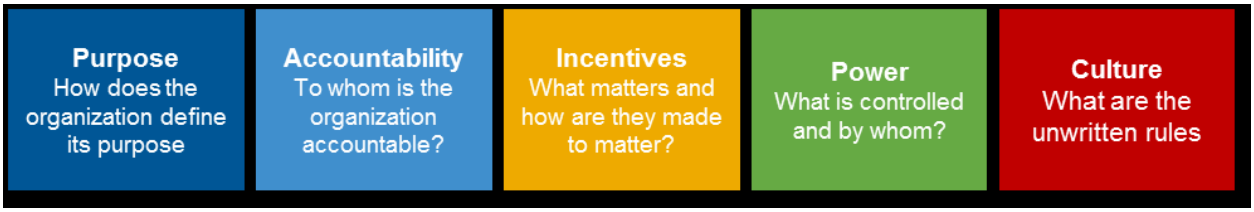

Figure 1: Organizational DNA

The DNA of an organization is manifested in its operating principles – they determine the way work actually gets done. We will work with the Commonwealth to understand the current principles for each agency and either refine or develop new principles aligned with the business strategy going forward. As a starting point, we have mapped out an example continuum from Control Oriented principles to Performance Oriented, which is reflected in the table below:

	Control-Oriented Operating Principles	Performance-Oriented Operating Principles
Purpose	• Do things right. • Carry out the role(s) defined in statutes, rules, and policies.	• Do the right things. • Serve its customers as defined in its mission, vision, strategy, and values.
Accountability	• Its authorizers – via chain of command. • Quality is defined by rules and regulations developed by experts.	• Its customers – through the chain of service or value. • Quality is defined by customers.
Incentives	• What matters: Adherence to the rules and established procedures. • Incentive: Stay out of trouble. • Adherence is achieved through supervision, reporting, audits, hearings, grievances. • People need to be told how they are doing.	• What matters: Delivering impacts that customers value. • Incentive: Get great impacts. • Adherence is achieved through measurement and reporting linked to consequences. • People know how they are doing.
Control	• Inputs – FTEs, costs, and other resources. • Control is concentrated at the top and exercised through the chain of command. • Compliance is achieved through enforcement.	• Outcomes – impacts and value for customers. • Control is delegated as close to the customer as possible in order to empower the chain of service. • Compliance is achieved by motivating people to comply voluntarily.
Culture	• Assume people will screw up or cheat; prevent them from doing so. • There is one best way of doing things. • Stay low and go slow. • Contract mentality. • Manage through fear.	• Assume people will perform; empower them to succeed. • Flexibility and innovation. • Find a better way. • Service mentality. • Touch people's hearts.

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Figure 2: Operating Principles: the Transformation to a High Performance Commonwealth

Our approach does not propose to use off the shelf, broad-based training programs and activities. Nor do we propose an extensive amount of time focused on theory or lecture. As recognized innovators in the learning space (Accenture was ranked as the number 1 Learning Elite Organization by CLO Magazine in 2014), we know that adults learn best through hands-on interaction with content. Our continuing research in the field of neuroscience also dictates that the competition for people's attention in a media rich environment is difficult and concepts must now be repeated multiple times in order to register in the brain. With this backdrop, we

recommend hands-on action learning with case studies that equip State Government leaders with the understanding of the approach to transformation and how each of the four tools identified in the RFR can be used to alter their organization's DNA. This training would be delivered by luminaries who have led similar efforts in the public sector – and lived to tell about it. These individuals would not only deliver the initial training; they would also be on hand for the duration of the work effort, serving as coaches for Category B and working hand-in-hand with agency leaders when more intensive work is called for in Category C and Category D. This allows the Commonwealth to benefit from continuity of resources and for training participants to benefit as the Accenture coaches build a deeper understanding of the tools and techniques needed to address the unique challenges their specific departments may be facing.

For more information on Accenture's history, approach offered to the Commonwealth and proposed ceiling pricing for services, please see the documents under the attachment tab for MBPO #: PO-16-1080-OSD03-SRC3-00000004927.

Contractor: Christine Swistro
MBPO# PO-16-1080-OSD03-SRC3-00000004923

Awarded Categories:

- Category B, Organizational Design Support

Overview, excerpted from the RFR Response: I have dedicated most of my professional career to helping organizations successfully navigate change and align their programs, processes and personnel both to meet their goals and inspire engagement and productivity among their workforce. The hallmark of my consulting practice has been partnering with executives to understand challenges and clarify goals and then engage team members at all level of the organization to create viable action plans and work together to implement those plans, transforming the organization and the individuals in the process.

I have extensive experience in the public, non-profit and for-profit sectors working with both large and small organizations and have built a reputation as a results-oriented management consultant, facilitator and executive coach known for implementing organizational change that streamlines work, builds effective communication practice, enhances worker productivity and management skill, and improves team performance and employee engagement. Although I have chosen to remain a sole proprietor, I have been able to make significant impact on the organizations I work with, quickly and accurately assessing needs, simplifying complexity, and developing effective intervention strategies that produce sustainable performance improvement.

I spent the first 10 years of my professional career in Massachusetts state government, working at the Executive Office of Transportation and Construction and Massachusetts High Department (now MassDOT) and at the State Comptroller's Office. This experience in vastly different organizations afforded me the opportunity to learn the workings of government in detail and appreciate the many constituencies, both internal and external, that government agencies are responsible to serve. As an employee then, and as a consultant in recent years, I have been

part of the change management and employee engagement efforts associated with three different enterprise-wide systems: the Commonwealth's Information Warehouse, the Human Resources Division's Employee Self-Service and Self-Service Time and Attendance programs, and OSD's COMMBUYS project. Each of these major efforts has demanded creative change management planning and effective engagement of leadership, employees and organizations throughout state government.

In addition to my government experience, I have provided organizational transformation consulting to financial services and technology companies, regulatory organizations, and a wide variety of non-profit organizations. For the past 6 years, I have provided business consulting services in Roots Cause's Social Innovation Forum (SIF). SIF selects promising non-profits through a competitive process and pairs those Social Innovators with business consultants to develop a plan for growth with which to approach potential investors. My experience with SIF has honed my ability to help organization devise plans to deliver maximum social impact with limited budgets and staff.

While the Early Retirement Incentive Program unavoidably will result in the loss of skilled and experienced agency staff members, it presents an opportunity to re-think past business practices, try new approaches which may previously have seemed too unconventional, and seek to tap remaining staff, challenging employees to be part of creating new ways of doing business. I believe my capabilities are well-suited to assisting agencies in meeting the challenges they will face.

Finally, I am certified WBE in Massachusetts and am certified to participate in the Small Business Purchasing Program.

For more information on Christine Swistro's history, approach offered to the Commonwealth and proposed ceiling pricing for services, please see the documents under the attachment tab for MBPO #: PO-16-1080-OSD03-SRC3-00000004923.

Contractor: Gartner, Inc.

MBPO #: PO-16-1080-OSD03-SRC3-00000004931

Awarded Categories:

- Category B – Organizational Design Support
- Category C End to End Organizational Assessment and Design

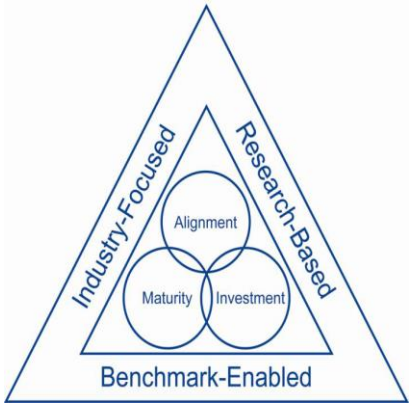
Overview, excerpted from the RFR response:

Gartner helps public sector agencies and commercial enterprises make confident technology and business decisions by providing them the necessary benchmarks, analysis and tools to successfully plan, evaluate, source, execute and manage their IT investments. We have worked with thousands of public sector agencies around the world, including federal, state and local government agencies; public utilities; and public educational institutions. Our public sector clients benefit from the IT insights and IT best practices we glean from our interactions with a vast array of public and private sector clients across all industries—in the United States and around the world.

- **Understanding of the State Government and the Commonwealth.** Gartner has been a trusted advisor to many states in their strategy, planning, sourcing and utilization of Information Technology. Gartner has worked with numerous state departments and agencies to develop complex analyses, business case documentation and plans for implementing technology improvements. We have worked on a number of major projects with the Commonwealth over the last few years, including two with OSD.
- **Multidimensional Best Practices.** Gartner's approach leverages 25 years of experience in IT Management including best practices in IT governance, technology IT Management including best practices in IT assessments, IT sourcing, IT consolidation, IT procurement, IT business case and financial analysis, human resource, contract, business intelligence, and operational risk considerations.
- **Business focused.** Public sector clients turn to Gartner for help with both strategic and tactical decisions because we offer what no her firm can: independent and objective advice on developing a results oriented business strategy that's backed by the power and reach of Gartner research. No one is better qualified to help you identify new opportunities, avoid mistakes and understand opportunities.
- **World Class Access to Research with a Local Delivery Team.** Great advice comes from great thinkers. While other analysts are limited to published research, Gartner analysts are working with Gartner customers around the world every day, staying well ahead of the information curve. With Gartner, COM will get advice directly from an experienced team that includes Northeast-based team members.
- **A Trusted, independent and Objective Third Party.** Gartner's independence is critically important. At a time when alliances between analysts and technology suppliers have clouded the landscape, Gartner remains resolutely objective and has no downstream interest in mind. We do not install or sell hardware, do not implement software or provide technology implementation services that can impair our ability to provide absolutely candid and factual advice. Our only interest is to help COM achieve the results it desires – to optimize its IT Organizational model and how it interfaces with other Divisions.

Gartner is the industry thought leader in IT organizational design and offers experts in developing organizational models, governance, strategy, architecture and change management. We offer the Commonwealth the desired experience and expertise in organizational and business process redesign; talent management and change management within organizations that have experienced the loss of long time employees with institutional knowledge; and implementation of business redesign and change management plans. In the past two years, experience germane to the scope of this RFR includes successful engagements with

- Virginia Beach
- Calgary Fire
- Pennsylvania Turnpike Commission



For more information on Gartner's history, approach offered to the Commonwealth and proposed ceiling pricing for services, please see the documents under the attachment tab for MBPO #: PO-16-1080-OSD03-SRC3-00000004931.

Contractor: KPMG

MBPO#: PO-16-1080-OSD03-SRC3-00000004934

Awarded Categories:

- Category B – Organizational Design Support
- Category C End to End Organizational Assessment and Design

Overview, excerpted from the RFR response: KPMG has strategically chosen to include partners and professionals with the specific knowledge and skills this program and associated initiatives will require. These professionals bring the experience and knowledge required to enable a successful result to the Commonwealth, in the areas of organizational design and change management; business process optimization; talent management and HR strategy; and experience in state and local governments.
We have briefly outlined some of the potential benefits and our qualifications for your consideration below.
The Right People – KPMG is a national leader in providing organizational assessment, business process redesign, and related services to a wide array of government agencies and other organizations. We have the resources available to provide the Commonwealth with the experience within the organizational design and talent management space, the deep knowledge of business process optimization, and the skills in organizational change management necessary to address the service support needs required for this initiative. KPMG has the ability to draw from a wide pool of resources with a variety of skills and talents in order to meet such requirements and assist in delivering the needed value. Our firm has over 27,000 professionals in the U.S. alone, of which over 1,700 partners and professionals are dedicated primarily to serving governments and some 1,400 of our advisory professionals hold advanced certifications relevant to organizational design and business process redesign.

The Right Experience – A critical component of this initiative's success relies on a partner being able to effectively collaborate with the Commonwealth and drive value immediately. We are proud to have both the vast national and global experience, as well as the local presence and experience with the Commonwealth, necessary to deliver high-quality services quickly and effectively. KPMG has performed hundreds of business process transformation and organizational change management engagements tailored for government clients, around the world and in the United States, as detailed in Corporate References Section. At a local level, KPMG's Boston office is home to over 800 audit, advisory, and tax professionals who are committed to fulfilling the firm's now (sic). We deeply value the knowledge gained from these projects as well as the relationships we have built that enable us to both more clearly understand key success factors and to appreciate the Commonwealth's unique needs.
The Right Approach – Our team understands that a flexible approach will be necessary to help ensure fit-for-purpose solutions for various agency needs. Our professionals will bring a wealth of organizational assessment and business process redesign experience and leading practices to support the achievement of the Commonwealth of Massachusetts' unique business objectives. Along with a flexible approach, we bring a suite of tools, methodologies and leading practices to reduce implementation risk, enhance stakeholder buy in and accelerate success. These tools, methodologies and leading practices combine the knowledge, skills, tools and techniques developed and continuously enhanced by KPMG's professionals across the globe to help enable us to deliver high quality services.

For more information on KPMG's history, approach offered to the Commonwealth and proposed ceiling pricing for services, please see the documents under the attachment tab for MBPO #: PO-16-1080-OSD03-SRC3-00000004934

Contractor: Longpoint Consulting, Inc.
MBPO #: PO-16-1080-OSD03-SRC3-00000004933

Awarded Categories:

- Category B – Organizational Design Support
- Category C End to End Organizational Assessment and Design

Overview, excerpted from the RFR Response: Longpoint Consulting, Inc. is a Boston-based boutique consulting firm that has been providing management consulting and coaching services for nearly a decade.

After a highly successful career as a general manager recognized for organizational leadership skills in the insurance service industry, Mark C. Kelley (MBA) envisioned starting a consulting firm different from many that he had experienced in his corporate roles. Specifically, he wanted to focus on an approach that was truly collaborative, responsive and customized to particular client needs.

Mark asked his long-time colleague Judith M. Marie (JD) to join him. Judith shared his vision and complemented his skills with her expertise in employment law and Human Resources.

Longpoint's first client was a major university asking for a Change Management assessment for one of its key divisions. This successful engagement led to multiple projects at this university, as well as numerous referrals to other colleges and universities. Since then, Longpoint has built an exceptional reputation partnering with clients by providing services that include:

- Organizational Assessment & Design
- Establishing a Service Vision
- Conducting Listening Tours
- Assessing Customer/Stakeholder Satisfaction
- Business Planning & Goal Setting
- Maximizing the Human Resource: Effective Talent & Performance Management
- Planning for Organizational Growth
- Understanding Business Metrics
- Organizational Leadership & Management Coaching
- Business Process Efficiency & Cost Management
- Change Management & Assessment
- Talent Assessment
- Building & Leading a High Performance Team
- Strategic Planning

Since its inception, Longpoint's higher-education clients have included Boston University, Northeastern University, MIT, Wellesley College, Laboure College and Dean College. In 2014, Longpoint added Linda Ragosta (PhD), to its team to address specific needs of some of its clients pertaining to academics (e.g., curriculum development and accreditation).
Longpoint has also worked with numerous corporate/non-profit clients, including Aetna Healthcare, Blue Cross Blue Shield of Massachusetts, KidsTerrain Inc./WorkTerrain, Massachusetts Housing Investment Corporation, New England Foundation for the Arts, Partners Healthcare, Spaulding Rehabilitation Hospital, US Bank and Walden Behavioral Care. In addition to its core team of Mark, Judith and Linda, Longpoint has an extensive network of experienced professionals from a variety of disciplines that can be available as part of our collaborative team when our client needs require.

Longpoint takes pride in developing and maintaining relationships with each of our clients. As a small, boutique firm of consultants, we are always personally involved with the work we do. Our consulting approach and processes are customized to each client's needs…not the "cookie-cutter" approach that is often provided by large, corporate consulting firms. Longpoint has extensive experience in Organizational

and Business Process Redesign and has provided consulting and coaching services in these specific areas to the following clients since 2013:
Organizational and Business Process Redesign
Laboure College (Office of the President)

- Climate Study, including Change Management
- Program Development & Assessment, Business Process redesign
- Student Service Model, Business Process redesign MIT (major administrative division)
- Human Resources – Community Needs Assessment, including identification of Leadership Competencies
- Organizational Needs Assessment

Northeastern University (a major administrative center serving students, faculty and staff)

- Change Management
- Organizational Services Review
- Leadership Coaching

Executive Leadership Coaching focusing on Organizational Design, Business Process Redesign, Talent and Change Management

- o Labouré College
- o Northeastern University
- o Massachusetts Housing Investment Corporation
- o Northeastern University
- o Spaulding Rehabilitation Hospital/Partners Health Care
- o Walden Behavioral Care

Finally, we wish to note that, although Longpoint has not provided consulting services to governmental entities, our extensive work with higher-education clients is extremely relevant to the Executive Agency Organizational Assessment & Design Consultative Services initiative. Like government entities, higher-education institutions have been historically been viewed as very attractive employers. Many have employees who have worked at one college or university for their entire career for four or even five decades.
In 2008, several of our higher-education clients were impacted by major changes in economic conditions. Additionally, with rising tuition costs, many have had to adopt a more “business-like” or “bottom-line” approach, necessitating thorough reviews of their organizational structures, business processes/services and strategic staffing needs, along with change management initiatives. Not surprisingly, long-term employees possessing institutional knowledge have not always either possessed the skills or the desire to be part of the new vision of these colleges and universities. Longpoint has worked with these clients to ensure that appropriate planning and documentation have occurred to maintain business continuity.

For more information on Longpoint’s history, approach offered to the Commonwealth and proposed ceiling pricing for services, please see the documents under the attachment tab for MBPO #: PO-16-1080-OSD03-SRC3-00000004933.

Contractor: The Lewin Group
MBPO#: PO-16-1080-OSD03-SRC3-00000004929

Awarded Categories

- Category B, Organizational Design Support
- Category C, End-to-End Organizational Assessment and Design
- Category D, Alternative Offering to the Categories B or C Scope of Services Needed.

Overview, excerpted from the RFR Response: For the Massachusetts Executive Agency Organizational Assessment and Design Consultative Services, the Lewin Group has partnered with DMA Health Strategies (DMA), Financial Transformations Inc. (FTI), and DBQuest Inc. The Lewin team will be led by David Hanig, Vice President at the Lewin Group. Mr. Hanig will drive the vision of this engagement in collaboration with Massachusetts. In addition, our team will include Patrick Finnerty and Catherine Hess as senior advisors and subject matter experts. Both bring over 25 years of state government and program implementation experience to our team that will directly inform the coaching, assessment and training services proposed in our scope of work. Our combined team, with expertise in organizational and business process improvement, talent management, and change management, as described below, as well as extensive understanding and experience in the Massachusetts health care arena, uniquely positions us to offer comprehensive services to the Commonwealth of Massachusetts that will support an effective organizational transition.

For this engagement, we propose a team primarily from Lewin's State Practice, whose experience and expertise in state government programs and policy, change management, and process improvement strategies can be directly leveraged to benefit Massachusetts. Our State Practice, led by Lewin CEO Lisa Chimento, has worked closely with several states on strategic planning, including business process improvement, staffing and training strategies, and transition planning. For example, Lewin has worked to support the Massachusetts Health Connector and MassHealth, as well as other state-based exchanges, to respond to high profile, operational needs by working collaboratively with state staff to address system shortfalls through process assessment and redesign, data analysis, and staff augmentation. Our State Practice also includes many staff members who have worked with Massachusetts agencies, have served in management and executive positions within state government, and have led strategic planning work with our state and federal clients.

Exhibit 1. The Lewin Team Overview The Lewin Group

The Lewin Group is a consulting firm with 45 years of experience delivering thorough research, objective analyses, and strategic counsel to clients, including business process improvement strategies, talent management, and change management. The organization consists of several practice areas, including state markets, federal health and human services, aging and disability policy, comparative effectiveness research, data analytics and program evaluation, and federal national security and emergency preparedness.

DMA Health Strategies

Since 1987, DMA has provided data driven strategies to support health systems change and quality improvement in behavioral health. DMA has supported various EOHHS and Massachusetts agencies with work on the design, procurement and evaluation of managed care and blended funding initiatives for public systems of care. The DMA team is also experienced in implementing learning collaboratives in publicly funded healthcare systems in Massachusetts. DMA's experience in Massachusetts includes engagements with the Massachusetts Health Planning Council, the Executive Office of Health and Human Services (EOHHS), the Department of Children and Families, the Department of Mental Health, and others listed in Exhibit 2.

Financial Transformations, Inc.

- FTI is a change management services firm, specializing in the design and management of organizational change campaigns. FTI expertise lies in four areas: system analysis of operations and performance; development and use of management systems to guide change; signature leadership style that improves communication and propels players into action; and financial modeling that captures results and advances sustainability. FTI supports executives and managers, enabling them to achieve bold goals by undertaking large scale change initiatives.

DBQuest, Inc.

- DBQuest, Inc. has experience in information technology and management consulting area. They have
- Assisted clients with Instructor Led Training, Business Process Re-engineering, Data Analytics, and Business Intelligence needs. DBQuest Inc. has also worked with various Massachusetts agencies for over 12 years.

Independent Contractors

- ***Patrick Finnerty*** - Following a 32 year career in Virginia state government, Patrick Finnerty formed his own consulting firm, PWF Consulting. During his government career, Mr. Finnerty served as Virginia's Medicaid Director from 2002 to 2010, as well as the Executive Director of the Virginia General Assembly's Joint Commission on Health Care.
- ***Catherine Hess*** – For over 25 years, Catherine Hess has worked with state agencies, primarily executives and senior staff in health agencies. Her experience informs knowledge of the specific challenges they face and strategies for working as effectively as possible in the context of those challenges. Prior to serving as a Managing Director at the National Academy for State Health Policy, Ms. Hess served at multiple state agencies in Massachusetts.
-

Expertise in Change Strategies and Management

- The combined expertise of Lewin, DMA, FTI and DBQuest uniquely positions us to deliver strategic consulting services to the Commonwealth, and specifically to the Executive Office of Health and Human Services (EOHHS) as it begins to anticipate and experience significant changes in personnel and resources. Our experience, highlighted in the client table listed below, will ensure we are able to offer the Commonwealth a comprehensive set of services through our:
- Knowledge of business process improvement strategies from both the government and

private sector perspectives,
- Extensive experience working with EOHHS and its partner agencies,
- In depth understanding of health reform and innovation that the Commonwealth of Massachusetts is currently undertaking across the health and human services landscape
- Ability to target opportunities for improved efficiency across various programs.

For more information on The Lewin Group's history, approach offered to the Commonwealth and proposed ceiling pricing for services, please see the documents under the attachment tab for MBPO #: PO-16-1080-OSD03-SRC3-0000000492

Contractor: Aleen Bayard (formerly Marketzing Aleen Bayard) MBPO #: PO-16-1080-OSD03-SRC3-00000004928 (effective July 1, 2016)

Awarded Categories

- Category B – Organizational Design Support
- Category C End to End Organizational Assessment and Design

Overview, excerpted from the RFR Response:

Aleen Bayard is highly qualified to provide services noted in Categories B & C. Due to the overlap in the nature of expertise, methodology and credentials required in the service lines, we have annotated our response narrative for Category B, opting for a fuller description in the End-to-End section.

Should any contracting agency want a FULLER outline of any of the services noted below (extracted directly from the RFR document), we can prepare a customized response and preliminary scope agreement within 24 hours.

Category B

Service	Description	Aleen Bayard strengths
Organizational design coaching	Focused consulting on specific aspects of the process.	We currently coach executives, managers and teams in Fortune 500 companies and non-profits. We can tap additional coaches in our network as needed. We use Hogan, DiSC, 360 and MBTI for individual assessment purposes.
Business process	Focused consulting on BPR.	N/A

redesign coaching		
Talent management coaching	Assist agency leaders and HR professionals in identifying and assessing required competencies.	We have developed proprietary leadership competency models for industry-specific jobs. We also work with existing platforms (SuccessFactors) to quickly assess talent against frameworks and performance management systems in place. If the agency needs a "good enough" model built from scratch, we can work with your HR professionals to have something ready to use within 2 weeks.
Change management coaching	Assist agency leaders with developing a change management strategy for implementing organizational and business process redesign.	Our sweet spot! Aleen has a Masters in Organizational Change (from Northwestern University) and teaches university-level courses on this topic. We integrate best practices from John Kotter, William Bridges and Daniel Goleman. We can provide sample workbooks and PPTS upon request.
Miscellaneous executive coaching	Meet with leadership on limited basis for related management issues.	Yes!

Category C. End-to-End Organizational Assessment and Design

Service: Strategic Organizational Planning, including values identification, definition and tie in to plan execution and performance feedback.

At a high level…We know the pitfalls of both change management and goal implementation. Our clients have successfully navigated through to successful implementations because we keep a tight focus on the requirements for leadership and execution excellence. We know how to partner with

clients in ways that make it easy – or at least easier – to put the critical pieces in place that will create and sustain a healthy platform for goal achievement while supporting leaders and their teams manage the attendant change and transition that is required to deliver.

Overview:
Our approach to the set of activities identified in the RFR presumes individual agencies/secretariats will have completed the workshop series described in Category A. **While we are not bidding on that component, we would hope (and recommend) the following collaborative hand-offs would be in place.** Too many cooks in the kitchen could confuse and distract the employees rather than leveraging the expertise and counsel of multiple outside vendor partners. After launching the initial set of all agency workshops, **you will enhance the success of the six-month per-agency support infrastructure IF:**

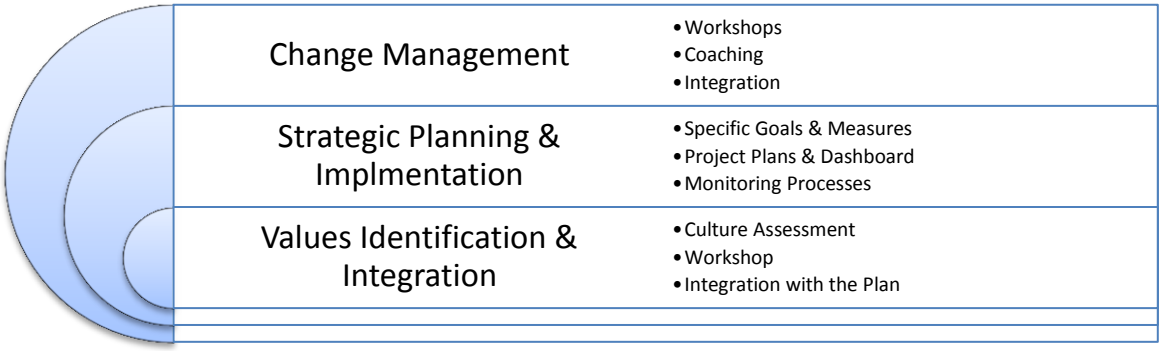
- Category A vendor shares high-level mission/vision/strategy documents with our team as well as appropriate tools and frameworks that should be implemented after the first set of workshops;
- Category A vendor provides actionable feedback and insights to our team for the purposes of further customization relative to the shared needs and pain points identified during its workshop series;
- A member of our team observes one workshop per topic as an additional measure to integrate lessons learned (and direction) from Phase 1 workshops into additional training and coaching design; and
- If multiple vendors are selected to deliver training and/or leadership coaching support, we are able to share and access non-proprietary materials (agenda, learning outcomes, assessment summaries) when those materials will accelerate progress in parallel engagements i.e. if Consultant A is engaged by the Secretariat of Transportation and the Secretariat of Energy later retains Consultant B, to the extent there is value in those consulting resources sharing best practices, there is a relatively cost-effective way to do so.

These protocols will ensure the Commonwealth derives maximum benefit from what will likely be a cohort of experts doing work throughout the system AND align the Category A outputs with subsequent, potentially autonomous consulting intervention.

How can we help?

With more than 30 years of experience in strategy design, planning and execution and leadership capacity building (both with individuals and their teams) we excel in the "rubber meets the road" project engagements**. Our clients are consistently in the 15% of organizations which succeed at strategic plan execution, because we are keenly attuned to the factors that contribute to the 85% failure rate**.

Our Proposed Service Framework



Around this framework, we implement through:

- Design meetings with the Core team;
- Workshops with integrated Action Learning principles (so the workshop is a live opportunity to apply new skills)
- Targeted, behavior-based leadership coaching for teams and individuals

With some adaptation and customization due to the specific needs and level of 'readiness' in individual departments or teams, we would develop a plan based on these components:

1. The strategy & structure for effective **change management,** starting with an initial change readiness audit. Presumably different offices will be in different stages of the transition curve (denial, anger/resistance, confusion/overwhelm, acceptance). Effective change strategies need to recognize and integrate a reality check.
2. Cultural alignment, including the **identification and definitions for core values**, so everyone has the same understanding of core purpose, what's important now (strategic goals) and the values (beliefs and behaviors) that underpin the ways in which we get work done. Under stress, people tend to derail and act out. Anticipating and addressing resistance points will help to keep people engaged and productive.
3. A carefully selected minimal number of **goals** based on data driven decisions – based on the deliverables, staff capacity, and proposed changes to the business process, what are three to five impact non-negotiable impact areas that require attention by year end?
4. Clarity around roles and accountability through the creation or update to specific **project plans** with milestones, timeframes, allocated resources and roles/responsibilities clarified. **Role clarity is the #1 make or break factor**, especially during times of dramatic change and bumpy transition.
5. A thoughtful **dashboard** and realistic **monitoring** process so leaders can easily answer the question: where are we now relative to where we'd hope to be? A monitoring system provides for relevant data, discussion and decision-making for ongoing learning, course adjustment and celebration when milestones are achieved. Candid, frequent, timely feedback will accelerate early wins. Leaders must also pay attention to fatigue and the need to be

generous with reinforcement to infuse energy and morale into what will likely be a somewhat demoralized work force (given the large number of employees who are taking early retirement)

6. **Just-in-time leadership coaching**, with a particular focus on feedback. Successful leaders (and managers) will need to significant up the ante to pump feedback into the new systems and be authentic in soliciting (and listening) to feedback coming back at them.

However, communication is the single most important tool in this work. As a former journalist and PR executive, Aleen provides the client team with a **comprehensive, real-time messaging support**, including:

- High level communication strategy outlining stakeholder concerns and key messages
- Specific bullet points and FAQs for collateral
- Scripts for staff meetings
- Drafts on major announcements and updates (we'll write your announcement and update e-mails for you!)
- Language and v1 drafts for presentations

A sample engagement might look like this….

Due diligence involving interviews, change readiness assessment and other rapid pulse-taking activities to quickly benchmark the **specific needs, concerns, resistance points and opportunities for action**

We used a proprietary "Organizational Change Readiness Audit" instrument (conducted through a single stakeholder meeting) to get an immediate read on the nuances of the client's current health around change. Because the instrument tests for vision alignment, employee engagement, communication effectiveness and leadership confidence, we are able to design our approach in situ. Clients receive **specialized guidance to meet their specific needs.** We might also use individual assessment tools (DiSC or Hogan) to identify coaching opportunities and provide the team with counsel on how to leverage differences rather than be frustrated, annoyed or disappointed by new colleagues or new roles.

These initial bench marking/assessments can be completed in one week (if the client can move that quickly) and provide a critical foundation for the rest of the work. As noted above, we are able to supply **all of the related communication messages to provide context and direction** for these various steps.

Culture Assessment & Workshop for values identification, definitions and tie in to performance feedback

From what we understand, the Commonwealth secretariats might gain valuable insights and perspectives from a cultural survey as a proxy for the values and behaviors we expect – regardless of the number of staff or state of business processes.

We recommend values work precede the planning so that we can exercise the values in the course of the facilitated session. A culture survey is the first step, so that leaders can quantify the current consistencies and tensions among and across the divisions and staff levels. Should employee engagement data already be available, we would use that to help customize the survey. Equipped with culture survey data, leaders can target specific organization development and alignment initiatives that will support the accomplishment of office's main goal. Our culture survey has a worldwide reputation for validity and creates results inform the strategic plan in a 10 to 15 minute web-based survey.

A focused and aligned organization culture supports all the business objectives and specifically ties to:

- Standards of excellence in accordance with the Office's goals:
- Retention of quality staff
- Expectations for individual performance
- Clarification of the next steps for leadership initiatives relative to creating and stewarding a workplace where people can do their best work

A culture assessment delivers:

1. A method for measuring culture and organizational health; Provides a base-line measurement instrument for monitoring changes in the organizational culture
2. A quick, valid, cost-effective read on what's going well / areas of exemplary conditions and what needs work from various perspectives (locations / departments / levels)
3. A description of the desired behaviors employees want in order to do their best work
4. Data that makes it possible for all leaders and managers to design and execute relevant, specific strategies for workplace improvement
5. A demonstration that Office is committed to engagement, providing everyone an opportunity to shape the future; gives everyone an equal voice and equitable opportunity to participate
6. A shared understanding of the survey results with practical applications for planning, execution and monitoring purposes, including data-driven priorities for discussion and planning
7. An opportunity to integrate the correlated culture initiatives with the strategic goals to ensure alignment and efficiency

Strategic Planning: The strategic organizational planning goal is to facilitate the development of actionable, realistic plans with measurable outcomes in order to support goal attainment, to enhance goal focus and to foster positive morale in ways that:

- Align with the most promising practices for successful goal setting and execution
- Generate high levels of consensus and commitment
- Encompass processes for clear milestones, roles and responsibilities
- Clarifies specific success measures and monitoring systems
- Tie progress reporting to individual performance feedback
- Promote recognition of significant milestones and learning from experience

We specialize in fast track planning, using all available data and the use of actionable project plans to ensure the most critical considerations are included.

Facilitated Goal Planning Session: 1 ½ days (or 3 ½ day sessions)

- Refresh Agency purpose, including confirming values definitions, vision, mission
- Identify measures of success
- Prioritize factors within the current reality (strengths, weaknesses, opportunities and threats)
- Prioritize strategic initiatives
- Identify action teams / leaders and next steps
- Debrief the plan report, within three weeks of the workshop

Assumptions for the planning process:

- Current, relevant data is already available
- New or updated data requiring external landscape data/issue identification is not needed
- External stakeholder input is not critical at this time
- Strategic issues are mostly known before the sessions

Project Planning: Facilitated Implementation: ½ to 1 full day per goal / project

Action teams move the strategic goals, measures and objectives from ideas to well-constructed project plans. Facilitation includes project planning templates and information related to project team leadership and the requirements for plan execution.

Once action teams form with multiple stakeholder group representation, the first meeting is devoted to questions like these:

1. What is the main goal we're focusing on here? What's our 12 month target?
2. What difference will accomplishing this goal make? Or, what will happen when we accomplish this goal?
3. What should be our key success indicators / measures? What information will we need to determine specific targets for our goals?
4. What are the preliminary assumptions we will use to guide our work?
5. What risks should we be mindful of?
6. When can we get our initial plan and required resource estimates to the board?
7. When we have our project plan outline, what else to do need to estimate required resources?
8. What will we look at to evaluate our project down the line?

The action team's deliverables include their SMART goal statements, with the associated success measures, targets and action steps with owners and timelines.

Dashboard Set Up and Monitoring Agreements:

Jim Collins, author of *Good to Great for the Social Sector* reminds us of the adage about the enemy of good is perfection. To that point, our clients quickly set up meaningful dashboards that pass the *good enough* standard and provide a framework for the leadership work needed to monitor and make adjusts on goals and their related activities. We provide the tools and strategies to move efficiently

through the decisions on which the strategic plan's dashboard will be based. This workshop ends with clear communication and monitoring agreements that boost accountability and trust.

Leadership & Team Coaching

Both principal consultants are experienced coaches. We typically work with a client for six months to focus our partnership on a set of concrete results and personal milestones. During times of change and uncertainty, coaching typically morphs into a thought partnering conversation. The coach serves as a thought partner, accountability buddy and active listener. Some conversations are therapeutic in nature; others more consultative. When possible, we conduct an initial assessment (DiSC, Hogan, MBTI or 360 – we are certified in all four instruments) to provide the client with a useful set of insights and data upon which to build a Leadership Action Plan.

A coaching relationship provides the client with an opportunity to:

- Reflect on the impact of his/her behaviors
- Expand his/her awareness and strengthen emotional intelligence
- Identify and internalize more effective approaches to relationship management across a broad spectrum of colleagues, direct reports and supervisors
- Review and respond to outside feedback – from 360s, assessment tools or direct input from the client's manager
- Translate intangible performance goals into concrete milestones – coaching puts teeth into leadership development and builds change management muscle

We provide a safe space to share highly confidential and sensitive challenges. While highly empathic, our coaching style is direct, engaged and focused on behavior. Clients routinely share feedback that coaching conversations have resulted in breakthroughs with colleagues and greater professional accomplishment. We offer on-demand support in addition to a bi-weekly phone or in-person appointment.

Contractor: RSM US LLP (Formerly McGladrey LLP)
MBPO#: PO-16-1080-OSD03-SRC3-00000004930

- **Awarded Categories**
- Category B – Organizational Design Support
- Category C End to End Organizational Assessment and Design

  Overview, excerpted from the RFR Response: McGladrey LLP is a national partnership founded in 1926 to provide consulting, assurance and tax services. McGladrey ranks as the fifth largest U.S. provider of assurance, tax, and consulting services—with 8,100 professionals in 75 offices (source: Accounting Today, 2014 Report).

- Our approach to organizational, leadership development, change management, and organizational strategy and design is focused on providing an assessment of the

current structure, understanding the core strategies to advance the goals of the Commonwealth Agencies, and working collaboratively to define an organization that meets your needs based on longer term strategic expectations. To accomplish this, our teams must be working collaboratively with your agency leadership and staff to understand the challenges loss of key knowledge staff has, allowing our teams to make specific and actionable future state recommendations which improve services and performance. Our methodologies, consultants and subcontractor are prepared to assist the Commonwealth with addressing needs as defined in Categories "B" and "C" of the RFR.

- This approach includes the evaluation of current services levels, the confirmation of potential structures and strategies, and the provision of recommendations for the plans you and your management team can execute. Based on potential best-practice approaches for achieving the Agencies' strategic goals, we will evaluate multiple potential scenarios for organizational structures and other strategic tactics. Ultimately, while working closely with your executive teams, we will recommend new structures or strategies where appropriate and develop a specific action plans to implement the changes you approve. The recommendation may include both near and long-term organizational practices, depending on the degree of change and organizational readiness.

- Our discovery and assessment methodologies include evaluation of the current structure of various departmental resources, as well as evaluations of department services and overall operation and delivery of services. We have found that the success of an organizational and leadership development and design project is dependent on several key factors, including:
    - Clear definition of the individual initiatives and the desired outcomes
    - Having a level of urgency for change
    - Executive sponsor support and involvement
    - Defining success targets to be achieved

- At McGladrey, we possess the capabilities and experience to support organizational and leadership development and design. Using industry best practices, the professionals at McGladrey have provided services similar to the required for organizational and talent management as described in this RFR. We understand that the best way to provide responsive, quality services is to assign the most qualified individuals to the engagement and maintain continuity of staff on successive engagements.

- **For more information on RSM's history, approach offered to the Commonwealth and proposed ceiling pricing for services, please see the documents under the attachment tab for MBPO #: PO-16-1080-OSD03-SRC3-00000004930.**

Contractor: McKinsey and Company, Inc.
MBPO#: PO-16-1080-OSD03-SRC3-00000004920

Awarded Categories:

- Category A, Organizational Design Training and Tools : ***Sole Award***
- Category B, Organizational Design Support
- Category C, End-to-End Organizational Assessment and Design
- Category D, Alternative Offering to the Categories B or C Scope of Services Needed.

- **Overview, excerpted from RFR response -**
- This is a critical yet exciting time for the Commonwealth and presents a unique opportunity to drive significant improvements in its organizational design, business processes, and talent management while building transformational change capabilities.
- McKinsey has completed over 8,000 engagements in the past 6 years in areas including organization design, business process design, human capital/talent management and change management. We have more than 450 consultants globally specializing in these content areas across the public, social and private sectors. This is why we are able to offer Commonwealth leadership with proven holistic approaches, expert coaching, best practice how-to guides and proprietary best-in class tools that we will also tailor to the needs of each agency. We will bring the following to this effort:
- Unrivaled expertise and experience in organizational design, talent management, change management, and business process redesign. We have successfully advised, led workshops, and coached the world's leading private, public, and social sector clients on these topics and have conducted extensive research in these fields. We will bring real-world experience from our over 8,000 efforts on these topics over the last six years.
- Deep knowledge of Massachusetts and US government having served over half of all states and Federal agencies and dozens of US cities in the last 10 years. Since 2009, we have served ~130 Massachusetts-based clients across a broad spectrum of industries and functions, within both the public and private sectors. Within Boston alone, our work has spanned ~260 engagements for ~90 clients across sectors.
- A proven technical approach and high impact, ready-to-use proprietary tools and resources, including playbooks, training modules, coaching guides, templates, benchmarks, and documented best practices to ensure leaders have the tools they need to succeed during and after the initial workshops and coaching.
- Independent and unbiased counsel to Commonwealth leadership with no conflicted interests. This enables us to provide guidance that is objective, trusted, practical, and holds up to organizational realities.
- McKinsey's Organization Practice has undertaken the most comprehensive research effort ever achieved in the field of organizational change, analyzing data from a wide

array of organizations to understand the key drivers of organizational health and performance. We have developed a systematic approach to identify and address gaps through our work in transformational change with thousands of clients worldwide. We know that high-performing organizations do not necessarily excel in all dimensions but are distinctive in a specific, winning combination of complementing strengths. Our Five Frames of transformational change, reflected in our approach outlined below, provide a practical framework to deliver a successful, integrated, and sustainable transformation of performance and health. The Five Frames is presented in the best-selling business book Beyond Performance (Scott Keller, Colin Price, 2011), drawing on input from over 600,000 executives and employees, 900 academic books and articles, and hands-on work with over 100 organizations. It has been customized and applied to over 3,500 transformational change engagements over the past six years.

- For this effort, we provide the Commonwealth with the resources to meet the agencies' needs.
- Category A represents a workshop and capability building model in which we will deploy in-person trainings with action-oriented concepts and skill building exercises, and explain and share proven tools and resources (e.g., playbooks, templates) through a mix of presentations, hands-on practice and physical/electronic documents for use after the workshops. In preparation for the workshops, we will analyze PRF65 Business Process Redesign (BPR) Statewide Contract personnel data across all Executive agencies and provide leadership from each agency with a diagnostic fact-pack about their organization that will provide a baseline on which workshop content will be applied.
- Category B provides org design support using best practice adult learning principles, templates, and homework for the leadership to apply the concepts to their day-to-day responsibilities and the agency's initiatives. During the first two weeks of the effort, we will run a high level diagnostic to understand the agency's needs and the existing baseline, and help determine the level and type of support needed. We will that is based on our proven field and forum approach to coaching.
- Category C provides end-to-end organizational assessment and design services grounded in capability building and change management and will include a heavier involvement of McKinsey personnel. During the first weeks of the effort, we will run a full diagnostic to understand the agency's current state organizational and operational needs, and help gear the support according to the most pressing needs through a workshop-style problem solving and decision-making approach, followed by action planning and creation of implementation plans.
- Throughout Category A, B, and C, we are prepared to draw on several proprietary McKinsey tools that enable us to quickly diagnose and address the specific challenges facing each agency
- Org Lab: OrgLab accelerates organizational decisions through advanced data analytics on spans and layers, innovative design technology, and executive capability building. This tool consists of both an online, automated tool that uses personnel data as input and optimizes the spans and layers to help size the opportunity for change along with training and workshops that can be applied to implement the necessary organizational changes. We will apply the Org Lab tool across all Executive Office

agencies, to establish a baseline for the work in Categories A-C.

- Organizational Health Index (OHI): In situations where there are specific challenges or unknown baselines on organizational health, we have successfully applied our proprietary OHI tool to establish the organization's health and performance baseline and equip leaders with facts to set specific targets and take action to achieve it. This is a comprehensive measurement tool supported by a benchmark database with over 1.8 million unique data points from over 800 public and private sector organizations with more than 2 million respondents.
- Talent System Assessment (TSAT): We could use the TSAT in Categories A-C to assess the Commonwealth's talent system, starting with a self-assessment that measures these essential aspects: recruiting and on-boarding, training and succession planning, engaging and connecting, rewarding skills and performance, growing leaders, linking the workforce model to organizational needs, and creating a talent culture. Understanding the existing talent system's strengths and gaps will enable us to design effective interventions to improve the workforce model.
- Change Leaders Forum (CLF): CLF is McKinsey's proprietary content and approach for building leadership capabilities. This is one of McKinsey's most sought-after trainings, focused on organizational transformation techniques. We will draw on key CLF content including videos, exercises, and templates for the workshops in Category A and coaching in Category B and C.
- We see value in serving the Commonwealth across all four categories with the aim of establishing comprehensive and consistent leadership capabilities across the Executive Office Departments to
- Manage early retirement risks proactively, plan ahead, and implement solutions successfully
- Fully understand the implications of a massive early retirement and the holistic approach needed to ensure no interruption to citizen services and the organization's mission impact
- Build on each agency's strengths and leverage current talent in new and more effective ways, matching specific agency needs to employees' strengths and potential.

Overview, excerpted from RFR Response:

McGladrey LLP is a national partnership founded in 1926 to provide consulting, assurance and tax services. McGladrey ranks as the fifth largest U.S. provider of assurance, tax, and consulting services—with 8,100 professionals in 75 offices (source: Accounting Today, 2014 Report).

Our approach to organizational, leadership development, change management, and organizational strategy and design is focused on providing an assessment of the current structure, understanding the core strategies to advance the goals of the Commonwealth Agencies, and working collaboratively to define an organization that meets your needs based on longer term strategic expectations. To accomplish this, our teams must be working collaboratively with your agency leadership and staff to understand the challenges loss of key knowledge staff has, allowing our teams to make specific and actionable future state recommendations which improve services and performance. Our methodologies, consultants and subcontractor are prepared to assist the Commonwealth with addressing needs as defined in Categories "B" and "C" of the RFR.

This approach includes the evaluation of current services levels, the confirmation of potential structures and strategies, and the provision of recommendations for the plans you and your management team can execute. Based on potential best-practice approaches for achieving the Agencies' strategic goals, we will evaluate multiple potential scenarios for organizational structures and other strategic tactics. Ultimately, while working closely with your executive teams, we will recommend new structures or strategies where appropriate and develop a specific action plans to implement the changes you approve. The recommendation may include both near and long-term organizational practices, depending on the degree of change and organizational readiness.

Our discovery and assessment methodologies include evaluation of the current structure of various departmental resources, as well as evaluations of department services and overall operation and delivery of services. We have found that the success of an organizational and leadership development and design project is dependent on several key factors, including:

• Clear definition of the individual initiatives and the desired outcomes
• Having a level of urgency for change
• Executive sponsor support and involvement
• Defining success targets to be achieved

At McGladrey, we possess the capabilities and experience to support organizational and leadership development and design. Using industry best practices, the professionals at McGladrey have provided services similar to the required for organizational and talent management as described in this RFR. We understand that the best way to provide responsive, quality services is to assign the most qualified individuals to the engagement and maintain continuity of staff on successive engagements.

For more information on RSM's history, approach offered to the Commonwealth and proposed ceiling pricing for services, please see the documents under the attachment tab for MBPO #: PO-16-1080-OSD03-SRC3-00000004930.

Contractor: McKinsey and Company, Inc.
MBPO#: PO-16-1080-OSD03-SRC3-00000004920

Awarded Categories:

- Category A, Organizational Design Training and Tools : ***Sole Award***
- Category B, Organizational Design Support
- Category C, End-to-End Organizational Assessment and Design
- Category D, Alternative Offering to the Categories B or C Scope of Services Needed.

Overview, excerpted from RFR response -

This is a critical yet exciting time for the Commonwealth and presents a unique opportunity to drive significant improvements in its organizational design, business processes, and talent management while building transformational change capabilities.

McKinsey has completed over 8,000 engagements in the past 6 years in areas including organization design, business process design, human capital/talent management and change

management. We have more than 450 consultants globally specializing in these content areas across the public, social and private sectors. This is why we are able to offer Commonwealth leadership with proven holistic approaches, expert coaching, best practice how-to guides and proprietary best-in class tools that we will also tailor to the needs of each agency. We will bring the following to this effort:

- Unrivaled expertise and experience in organizational design, talent management, change management, and business process redesign. We have successfully advised, led workshops, and coached the world's leading private, public, and social sector clients on these topics and have conducted extensive research in these fields. We will bring real-world experience from our over 8,000 efforts on these topics over the last six years.
- Deep knowledge of Massachusetts and US government having served over half of all states and Federal agencies and dozens of US cities in the last 10 years. Since 2009, we have served ~130 Massachusetts-based clients across a broad spectrum of industries and functions, within both the public and private sectors. Within Boston alone, our work has spanned ~260 engagements for ~90 clients across sectors.
- A proven technical approach and high impact, ready-to-use proprietary tools and resources, including playbooks, training modules, coaching guides, templates, benchmarks, and documented best practices to ensure leaders have the tools they need to succeed during and after the initial workshops and coaching.
- Independent and unbiased counsel to Commonwealth leadership with no conflicted interests. This enables us to provide guidance that is objective, trusted, practical, and holds up to organizational realities.

McKinsey's Organization Practice has undertaken the most comprehensive research effort ever achieved in the field of organizational change, analyzing data from a wide array of organizations to understand the key drivers of organizational health and performance. We have developed a systematic approach to identify and address gaps through our work in transformational change with thousands of clients worldwide. We know that high-performing organizations do not necessarily excel in all dimensions but are distinctive in a specific, winning combination of complementing strengths. Our Five Frames of transformational change, reflected in our approach outlined below, provide a practical framework to deliver a successful, integrated, and sustainable transformation of performance and health. The Five Frames is presented in the best-selling business book Beyond Performance (Scott Keller, Colin Price, 2011), drawing on input from over 600,000 executives and employees, 900 academic books and articles, and hands-on work with over 100 organizations. It has been customized and applied to over 3,500 transformational change engagements over the past six years.

For this effort, we provide the Commonwealth with the resources to meet the agencies' needs.

• Category A represents a workshop and capability building model in which we will deploy in-person trainings with action-oriented concepts and skill building exercises, and explain and share proven tools and resources (e.g., playbooks, templates) through a mix of presentations, hands-on practice and physical/electronic documents for use after the workshops. In preparation for the workshops, we will analyze personnel data across all Executive agencies and provide leadership from each agency with a diagnostic fact-pack about their organization

that will provide a baseline on which workshop content will be applied.
• Category B provides org design support using best practice adult learning principles, templates, and homework for the leadership to apply the concepts to their day-to-day responsibilities and the agency's initiatives. During the first two weeks of the effort, we will run a high level diagnostic to understand the agency's needs and the existing baseline, and help determine the level and type of support needed. We will that is based on our proven field and forum approach to coaching.
• Category C provides end-to-end organizational assessment and design services grounded in capability building and change management and will include a heavier involvement of McKinsey personnel. During the first weeks of the effort, we will run a full diagnostic to understand the agency's current state organizational and operational needs, and help gear the support according to the most pressing needs through a workshop-style problem solving and decision-making approach, followed by action planning and creation of implementation plans.
Throughout Category A, B, and C, we are prepared to draw on several proprietary McKinsey tools that enable us to quickly diagnose and address the specific challenges facing each agency
• Org Lab: OrgLab accelerates organizational decisions through advanced data analytics on spans and layers, innovative design technology, and executive capability building. This tool consists of both an online, automated tool that uses personnel data as input and optimizes the spans and layers to help size the opportunity for change along with training and workshops that can be applied to implement the necessary organizational changes. We will apply the Org Lab tool across all Executive Office agencies, to establish a baseline for the work in Categories A-C.
• Organizational Health Index (OHI): In situations where there are specific challenges or unknown baselines on organizational health, we have successfully applied our proprietary OHI tool to establish the organization's health and performance baseline and equip leaders with facts to set specific targets and take action to achieve it. This is a comprehensive measurement tool supported by a benchmark database with over 1.8 million unique data points from over 800 public and private sector organizations with more than 2 million respondents.
• Talent System Assessment (TSAT): We could use the TSAT in Categories A-C to assess the Commonwealth's talent system, starting with a self-assessment that measures these essential aspects: recruiting and on-boarding, training and succession planning, engaging and connecting, rewarding skills and performance, growing leaders, linking the workforce model to organizational needs, and creating a talent culture. Understanding the existing talent system's strengths and gaps will enable us to design effective interventions to improve the workforce model.
• Change Leaders Forum (CLF): CLF is McKinsey’s proprietary content and approach for building leadership capabilities. This is one of McKinsey’s most sought-after trainings, focused on organizational transformation techniques. We will draw on key CLF content including videos, exercises, and templates for the workshops in Category A and coaching in Category B and C.
We see value in serving the Commonwealth across all four categories with the aim of establishing comprehensive and consistent leadership capabilities across the Executive Office Departments to

• Manage early retirement risks proactively, plan ahead, and implement solutions successfully
• Fully understand the implications of a massive early retirement and the holistic approach needed to ensure no interruption to citizen services and the organization's mission impact
• Build on each agency's strengths and leverage current talent in new and more effective ways, matching specific agency needs to employees' strengths and potential.

For more information on McKinsey & Company's history, approaches offered to the Commonwealth and proposed ceiling pricing for services, please see the documents under the attachment tab for MBPO #: PO-16-1080-OSD03-SRC3-00000004920.

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Contractor: MetaView Consulting and Coaching
MBPO#: PO-16-1080-OSD03-SRC3-00000004926

Awarded Categories:

- Category B for business process re-engineering, coaching and misc. consulting
- Category D

Overview, excerpted from RFR Response: MetaView Consulting & Coaching was founded by Steve Frigand in 2002 as a firm that enables its clients to achieve their most important goals in ways that are both efficient and sustainable. Steve and associates have developed a unique blend of approaches that include the following elements:

1. Customized and Generative Co-diagnose, co-plan, and co-implement to develop joint ownership and more lasting results
    - Collect meaningful viewpoints from key stakeholders in order to create an objective snapshot of the situation and needs
    - Refine the engagement to reflect new understanding and new developments
2. Strength and Value-Based
    - Surface the client's purpose, role and value system as the foundation to which assessments are based
    - Build upon the client's strengths and previous success
    - Create an environment that is open, comfortable and engaging
    - Encourage shifts in perspective and broadened viewpoints
3. Sustainable
    - Make it easier to implement new behaviors when we "walk the talk" and role-model respectful collaborative techniques that get results
    - Help normalize the handling of change and transitions that acknowledge that surprises will always occur
    - Prepare our clients for new forms of support after we are gone

Our approach to partnering with the client has left our clients with an enhanced ability to handle the many challenges they continually face. We are proud of what we have accomplished with our clients and the mutually respectful quality of those relationships. It has been important confirmation that our approach and operating principals will continue to help others.

Steve Frigand is the principal and founder of MetaView Consulting & Coaching and the sole proprietor. Steve works with associates that have many years of direct senior management experiences in all types of organizations.

MetaView has over the years built a well vetted team of senior associates who have each provided customized coaching and training for between 13 and 30 years. Our engagements have been in a variety of sectors and with a wide breadth of emphasis. Based on our experience, we choose to customize our approach and our templates for each group. The guiding principle of our approach is to ensure co-ownership of the project by all key stakeholders. We do this by respectfully working with clients to surface their experiences, perspectives and challenges in ways that reveal patterns and do not feel personal. By working with colleagues in our group work, we are able to better serve their needs and attempt to role model the change that is being sought. We very consciously strive to maximize the organization's ability to build on our support long after our engagement is over.

For more information on MetaView's history, approach offered to the Commonwealth and proposed ceiling pricing for services, please see the documents under the attachment tab for MBPO #: PO-16-1080-OSD03-SRC3-00000004926.

Contractor: Public Consulting Group (PCG)
MBPO#: PO-16-1080-OSD03-SRC3-00000004925

Awarded Categories:

- Category B – Organizational Design Support
- Category C End to End Organizational Assessment and Design

Brief Description: PCG has an almost 30 year history working in close partnership with the State. We have a unique depth and breadth of understanding of executive agencies' history and current circumstances, strengths and gaps. We also bring the broad spectrum perspective allowed by a global portfolio of public sector continuous improvement work, spanning almost all states of the Union and several countries outside the United States. Armed with this unique set of perspectives, tools and templates, broad experiences, and industry-leading practices, PCG is prepared to help the Commonwealth capitalize on the opportunities posed by ERIP:

- Upward mobility of talented public administrators previously blocked by long-serving incumbents;
- Re-examination of roles and organizational structures constructed on potentially outdated assumptions or the unique skillsets of and dynamics between entrenched individuals and bureaucracies; and,
- Engagement of talented individuals at all levels in creative organizational change and redesign work.

PCG was founded on the belief that government services should provide more value to the public, and nowhere is that idea more resonant than in our ***Sustainable Change*** work. Sustainable Change is a bundle of knowledge and tools that supports the growth, change and revitalization of organizations and their operations – regardless of where an agency finds themselves structurally, financially, or culturally. PCG Sustainable Change is built upon experience, industry standards, curiosity, and imagination. Our process redesign methodology adapts many features of Lean and Six Sigma. Our organizational assessment work is grounded in tools developed by the American Public Human Services Association (APHSA) and its Organizational Effectiveness unit. And our project management methodology is strongly influenced by the Project Management Body of Knowledge. Our guiding principles and standards of Sustainable Change include the following:

- **Forward movement is sacrosanct.** To create sustainable change you must always be moving forward, even if by baby steps or by "one step back to take two steps forward."
- **Our responsibility is to help put things in motion along a sustainable path**. While we may not be giving the final directive or pushing the button, we're committed to crafting a vision and seeing it through.
- **Good deliverables drive forward movement**. When it comes to change work, if it's not in writing, it doesn't exist, and you're doomed to repeat. At every step, concrete written work products tell us where we've been, where we are, and where we need to go next.
- **You have to be systemic and systematic**. By recognizing how your organization lives within an ecosystem of people and processes, you can find bridges and avoid trap doors. By traversing via stepping stones versus single-bound leaps, you stay on solid ground versus plunging into the abyss.
- **Success is measured in multiple, linked bottom lines**. These bottom lines can include financial solvency, organizational effectiveness, operational efficiency, customer outcomes, and/or other aspirations. Multiple bottom lines measured by multiple benchmarks create the conditions for sustainability.
- **Improvement happens in cycles that can lead to great leaps forward.** Any given project is part of something bigger, and success can be contagious. Seize the day.

Because we view Sustainable Change as a cyclical process with multiple entry points, PCG is positioned to provide varying levels of support based on agency needs. We commit to working with closely EOHHS agencies to respond to their challenges with a detailed approach, work plan, and budget that meets their needs. Whether it is through workshops, coaching, or full agency redesign, PCG has the experience, desire, and skills to help transform the Commonwealth into a high-performing and forward thinking Secretariat.
PCG has completed numerous projects of similar size and scope. As previously noted, PCG almost exclusively focuses on government. Detailed in the chart below are competencies and experience that PCG has gained through project work that are directly applicable to the skills and experience needed to successfully carry out the work in this RFR.
Organizational Assessment – This includes the facilitation of staff-driven efforts aimed at improving strategy, communication, and morale – which often have an effect on program efficiency and customer service – within an agency.

Process Redesign – This includes conducting "as-is" and "to-be" business process mapping, identifying inefficiencies, and redesigning processes to work better. In most cases, this work includes the analysis of overall operations and staffing resources.

Change Management – This includes working with leadership on delivering the right messages, and working with staff and stakeholders to gain buy-in and acceptance for, and participation in the change process. Effective communication, outreach, and consistent messaging are critical.

Implementation/Training – This includes workshop delivery, one-on-one and group coaching sessions, training on process, technology, and policy, and oversight/management of implementation activities.

Talent Management/Coaching – This includes assessing the skills and capacity of the current workforce, redefining job roles and responsibilities, effective performance management, and developing the current and future skills of your workforce.

For more information on PCG's history, approach offered to the Commonwealth and proposed ceiling pricing for services, please see the documents under the attachment tab for MBPO #: PO-16-1080-OSD03-SRC3-00000004925.

Contractor: Right Management- Manpower Group
MBPO#: PO-16-1080-OSD03-SRC3-00000004932

Awarded Categories:

- Category B – Organizational Design Support

Overview, excerpted from the RFR Response: Right Management and Experis, sister brands within ManpowerGroup, are pleased to present this response for Organization Design,

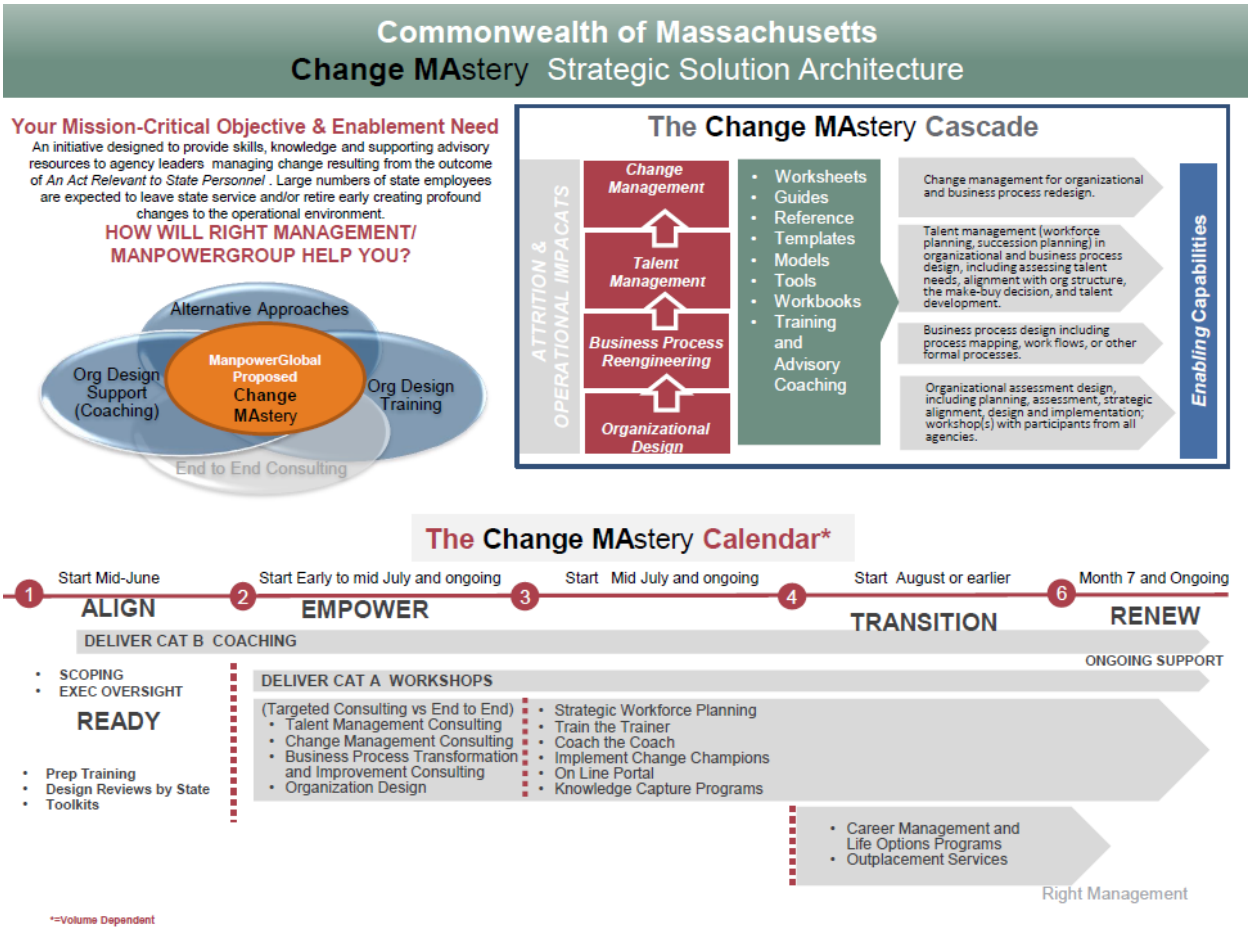
Business Process Reengineering, Talent Management, and Change Management training and consulting services for the Commonwealth of Massachusetts.

Our collective deep experience and expertise in Organizational Effectiveness, Workforce Resource and Business Process Transformation, Career Development, and Talent Management Solutions is recognized worldwide. Right Management, with its focus on Talent and Career Management Solutions, and Experis, a leading Professional Resourcing and Project Solutions company in its own right, have between them over seven decades of experience providing workforce, career and talent services to over 80% of the F500 and also have supported dozens of state and local governments with IT, Finance, HR, and Business consulting support, project-based services and over 60 Federal government programs.

We are not only workforce and organizational experts; we are also familiar with highly regulated government contracting issues and have significant experience and compliance with government regulations. Examples of our work with governmental agencies and other clients facing significant workforce and operational change are included in our response. We have local, regional and national consultants-highly experienced in people and operational issues-and dozens of national and global practice and thought leaders, available to assist you with both the hands-on work of change as well as the larger, more complex issues of agency integration. We participate and maintain membership in a wide range of leading organizational improvement groups from operations-focused to those addressing strategic global concerns or with a focus on executive and organizational excellence (i.e. from APQC, to DAVOS to The Conference Board).

We bring that experience to the Commonwealth at this point of your efforts to enable organizational and operational effectiveness in light of the massive personnel impacts. The suggested high-level solution architecture we offer on the following page delivers the cascade of integrated support services to build core change capabilities. Through the training, coaching and consulting to agency leaders assigned to address change resulting from *An Act Relevant to State Personnel*, we see the opportunity to embed in the shorter term skill, knowledge and operational outcomes that can better position a more resilient state operating structure and management culture for the longer term.

Our architecture outlines an intentional process, a connected set of scaffolds where participants gain capabilities in areas of change, and as a result, can, with confidence, continually apply their improving capabilities against evolving work challenges, shifts, and emerging opportunities. Experience, research and previous client success show us that the process of leading change, and the resulting transition it requires, is more difficult without an underlying model that leverages the nature of any *organization as a system*; addresses the issues of both *macro (bigger structural) and micro (local and individual)* change; and accepts the process of change being that of a journey that can always be better managed. Our recommended services embrace the Commonwealth's multi-tiered support strategy, and are based on those core principles of Organizational Effectiveness with a goal of mastering change, or in the case of the Commonwealth's opportunity, a goal of **Change MA**stery.



For more information on Right Management's history, approach offered to the Commonwealth and proposed ceiling pricing for services, please see the documents under the attachment tab for MBPO #: PO-16-1080-OSD03-SRC3-00000004932.

Contractor: The Ripples Group

MBPO#: PO-16-1080-OSD03-SRC3-00000004922

Awarded Categories:

- Category C – End to End Organizational Assessment and Design

Overview, Excerpted from RFR Response: The Ripples Group was founded in 2000 by experienced consultants from large consulting firms, mainly Bain & Company. Headquartered in

Boston, we serve local, national, and international clients with a broad spectrum of professional services. In 2007 we acquired the consulting assets of ProVentive Inc., which increased our public sector exposure.
Ripples partners have published numerous books and articles on various aspects of leadership, strategic planning, transformations, organizational dynamics, corporate responsibility, and project management. Some highlights are:

- *To The Desert and Back*, a management book co-authored by Dr. Karen Ayas and translated to many languages including Chinese, tells the detailed story of a large scale organizational transformation at Unilever;
- Ripples partner Dr. Phil Mirvis, in his recently published *Beyond Good Company*, frames the issues organizations face in corporate responsibility and discusses many real-life examples at global enterprises.
- In an article titled "Winning Strategies," Atilla Habip draws parallels between strategic and scientific thinking;

First and foremost we are **discussion partners to senior executives**. We work collaboratively with executive teams to accomplish complex and demanding tasks. Ultimately, we measure ourselves not by the elegance of our reports but by our clients' success.

Our client relationships tend to be long-term. Almost every client has become a repeat client, which we believe speaks to the quality of our work. Having started with a civic mindset, we have a long history of working with government agencies, the judiciary branch, legislatures and mission-driven non-profits. Some examples include EOHHS (MassHealth, DCF, DTA), Departments of Public Health in Massachusetts, Delaware and Washington DC; The Lewis Family Foundation, the National Association of Fire Protection, and the Society for Organizational Learning at MIT. Our corporate clients include: Pfizer, Alcatel-Lucent, AkzoNobel, Comverse, Unilever, and many smaller companies.

In contrast to large consulting firms, our partners are hands-on and invest personally in each project (versus merely appearing at major reviews). Simply, we are passionate about our work. Our approach is very much **fact- driven**. Building on thoughtful research, we strive to make sense of quantitative and qualitative data. We also use specialized and proprietary analysis and presentation tools. We are pragmatically driven by a robust focus on results – synthesizing information so it truly supports executive decision making.

We pay particular attention to **organizational commitment**. We sincerely believe that strategies and tactics on paper are worth very little and implementation only moves forward when the organization owns the direction and adopts an execution mindset from the beginning. In most of our organizational design and strategy work, implementation starts long before the planning is finalized.

We are well-versed in **managing change**. From establishing strategic clarity to revamping business processes and rebalancing the organizational model to building consensus, we act as catalysts for change, build organizational momentum, and galvanize the desired organizational transformation. Recently we have been instrumental in strategic resource planning at The Massachusetts Trial Court, in re-engineering the MassHealth Operations as a result of the

Affordable Care Act, and in structuring the performance management program at the Massachusetts School Building Authority.

Our qualifications for this undertaking can be summarized as follows:

Organizational Design & Change Management Expertise

- Track record of organizational design and change management including implementation & operationalization with:
  - Government agencies
  - Non-profits
  - Large corporations
- Proven expertise in research, analysis, and synthesis

Extensive experience with Massachusetts state agencies

- Including:
  - EOHHS
  - MassHealth
  - DPH
  - EEC
  - OSD
  - DTA
  - MSBA
  - Trial Court
  - DCF
- Many cross-agency projects
- MA Legislative Commission

Passionate and Energetic Team

- Civic mindset
- High energy team
- Quick, avid learners

For more information on The Ripples Group history, approach offered to the Commonwealth and proposed ceiling pricing for services, please see the documents under the attachment tab for MBPO #: PO-16-1080-OSD03-SRC3-00000004922

Appendix 2:

Business Process Improvement (BPI) Planning Documents and Sample Statement of Work Form

Business Process Improvement

Agency:_____
Project Lead:_____

Background and Overview of the Work

Provide a brief assessment of the issues. This might include #/% of positions eliminated; services that are failing to meet expectations; feedback from key audiences, current or past employees, etc.

- **Why are we undertaking this work?**
- **What is the issue, goal or opportunity?**
- **What is the desired outcome?**
- **What is the degree and sense of urgency?**

Remember: A reduction in staff does not need to result in assigning more responsibilities to fewer people. It is an opportunity to redesign processes, eliminate redundancies, increase efficiency, improve service delivery, transform the working environment, and ultimately provide more value per dollar to the taxpayers of the Commonwealth

Scope

Define at a high level what work will be included in the project. Be concise and clear.
Is this a complete end-to-end redesign of how the agency is structured? What services are offered? How current work is sourced? -Or- Is it a more focused review and redesign of how a specific department completes their work? Or a specific service offered?
Out of Scope: It is important to define what this project will NOT include.

Specific Objectives

Setting objectives early in the project will help guide the selection and engagement of a firm.

- Focus on outcomes rather than activities
- Make sure objectives are SMART *(specific, measurable, aggressive, realistic and time-sensitive)*
- Use clear and common language
- Make sure ***every objective has at least one measure*** -and- ***every measure has at least one performance target***

Example: Launch x new service with 95% customer satisfaction [exit survey] by November 15th (objective) + (measure) + (target)

Proposed Project Team

- Define roles and responsibilities of your core working team. The Sponsor and Project Lead should be named first. The rest of the team could be built after selecting a firm to assist in

this work. The Sponsor and the rest of the team could be built after selecting a firm to assist in this work.

- *Sponsor: _____ (executive who sanctioned the project, approves major changes, represents the agency)*
- *Project Lead: _____ (leader who is responsible/accountable for delivery and success of the effort)*
- *Functional Lead: _____ (individual expert(s) needed to complete project ex: IT, Finance, HR, etc.)*
- *Team Members: _____ (Participants)*
- *Project Support: _____ (manages and guides planning through execution)*

Proposed High-level Timeline

- **What do you see as critical milestones?**
- **Is there a proposed completion date?** *(Define a metric to assess success)*

Risks

What are the biggest risks?

- **What is the worst case scenario?**
- **What is the level of urgency?**
- **Who, when and how will the decision be made to move forward?** *(Define a metric to assess success)*

Evaluation

- **Compared to the current structure or capability, how can success be measured?**
- **How will options be evaluated?** (This may be unknown. *Consider- Have all internal resources been explored?)*

Warning! Pitfalls

Limited time and resources frequently cause people to cut corners. This can impact the project's chances for success. Avoid the following common pitfalls to reduce negative impacts.

Define roles and responsibilities of your core working team. The Sponsor and Project Lead should be named first. The rest of the team could be built after selecting a firm to assist in this work.

- *Sponsor: _____ (executive who sanctioned the project, approves major changes, represents the agency)*
- *Project Lead: _____ (leader who is responsible/accountable for delivery and success of the effort)*
- *Functional Lead: _____ (individual expert(s) needed to complete project ex: IT, Finance, HR, etc.)*
- *Team Members: _____ (Participants)*
- *Project Support: _____ (manages and guides planning through execution)*

Limited time and resources frequently cause people to cut corners. This can impact the project's chances for success. Avoid the following common pitfalls to reduce negative impacts.

Framing vague project objectives

(Always use specific measurable objectives)

Overlooking key audiences *(whose opinions determine your success? And who are your supporters? What should be communicated? How? When? To Whom?)*

Failure to level-set or document assumptions *(don't assume that everyone is on the same page)*

Backing into a schedule *(Don't set due dates without thoughtfully considering how long it will take to do the job correctly)*

Failing to update your plan *(Plans change! Update whenever key information or objectives change)*

Withholding key information *(working with different information reduces work quality and employee commitment*

Business Process Improvement
Agency:_____
Project Lead:_____

Background and Overview of the Work
Provide a brief assessment of the issues. This might include #/% of positions eliminated; services that are failing to meet expectations; feedback from key audiences, current or past employees, etc.

Scope
Define at a high level what work will be included in the project. Be concise and clear

Specific Objectives
Make sure objectives are SMART (specific, measurable, aggressive, realistic and time-sensitive)

Proposed Project Team
Define roles and responsibilities of your core working team. The Sponsor and Project Lead should be named first. The rest of the team could be built after selecting a firm to assist in this work.

Executive Sponsor: Project Lead: Functional Lead(s): Team Members: Project Support:

Proposed High-level Timeline

Risks

Evaluation

OPERATIONAL SERVICES DIVISION

COMMONWEALTH OF MASSACHUSETTS
CONTRACTOR ENGAGEMENT FORM
FOR COMMODITIES AND/OR SERVICES

*	☐ COMMODITY/EQUIPMENT	☐ SERVICE

☐ **THIS ENGAGEMENT FORM CONFIRMS AN ORDER THAT WAS PREVIOUSLY PLACED. PLEASE DO NOT DUPLICATE.**

This form is to be used to document contractor engagements under existing contracts for commodities and services in cases where the Department and the Contractor must document agreement on commodity/service specifications, scopes of work, product customization, or other specifications and terms not addressed in the existing contract. This form or additional specifications are not required if the Department determines the RFR and contract contain all of the information required for the contractor engagement. The vendor must sign this form for the engagement of services.

***COMMBUYS Master Blanket Purchase Order Number:**		
MMARS Document Number:		
Contract Number:		
Contract Description/Title:		
Requested Delivery Date:	**Service Dates:** From: To:	**Call to Schedule Delivery Appointment:** ☐ Yes (tel.) ☐ No

Vendor Information	
***Name:** ***Address:** ***City, State, Zip Code:**	**Contact Person:** **Telephone:** **Fax:** **Email:** **Quote Number (if applicable):**

Department Information	
***<u>Ship to</u> Department Name:** ***Contact Person:** ***Address:** ***City, State, Zip Code:** ***Telephone:** **Email:**	***<u>Bill to</u> Department Name:** ***Contact Person:** ***Address:** ***City, State, Zip Code:** **Telephone:** **Email:**

Delivery Instructions (if any):	
Freight Terms (if any):	

Additional Terms:

1. The vendor's invoice must include the following minimum information: COMMBUYS purchase order number, quantity and description of item(s) delivered to the Department (e.g. items shipped, hours worked, names of milestones/deliverables, or a description of services rendered), unit of measure, unit price, total dollar amount of any discount, total price and the vendor's invoice number.
2. See attached specifications, if any, related to this engagement. If this Engagement Form is for services, please see the section entitled Engagement of Services below. Additional specifications are not necessary if the details of the performance are covered in the contract.
3. If commodities or equipment are delivered, the COMMBUYS purchase order number must appear on the vendor's packing list.
4. Vendor assumes risk of loss for commodities in transit. All commodities are subject to inspection upon delivery. Commodities delivered after the Requested Delivery Date above may be rejected. Rejected commodities will be returned at the vendor's expense.
5. The effective date will be the later of the signatures below or the following date:

*** Engagement of Services (may be required for services):** If this Engagement Form is for the provision of services, which have been negotiated with the vendor, provide a brief description here of those services and/or attach detailed specifications. Also, include the number of hours, hourly rates, and/or names, descriptions and schedule(s) of milestones/deliverables, and other information associated with this engagement.

Department Approval	*** Vendor Approval** (only required for the Engagement of Services)
Signature: _____	***Signature:** _____
***Printed Name:**	***Printed Name:**
***Date:**	***Date:**

**** Indicates required field***