



Professional Development for Organization Leadership

*“Leaders Guiding Leaders to Sustainable
Success”*



- Submitted by
- CMA Enterprise Incorporated
- Gail P. Birks, President/CEO
- Davie, Florida



Greetings

The six part Leadership Development Series is designed to meet leaders at whatever level they are in the organization. I should also add that the order of the sessions can be moved and/or customized to suit the priority of the organization and the associated development requirement.

CMA Enterprise Incorporated is a Process and Performance Improvement Consulting and Advisory firm serving business and industry. Since 1990, we have specialized in raising our client's levels of maturity and enhancing your capability and capacity. Our approach is to use methodologies tied to the performance and process improvement disciplines that delivers AHA Moments again and again for sustainable success. We have provided innovative corporate training excursions in classroom, self-directed, blended, and webinar formats to business and industry, public sector organizations, government (local, state and federal), and non-profit organizations.

At CMA our reputation in the marketplace is that we are known for bringing our clients' organizations full circle so that we can move you forward. Our value proposition is ... Reliability, Accuracy in Solutions , Delivery, Integrity, Results Oriented, will certainly support the vision of FIU for the intended engagements. We also provide Professional and highly Experienced team members.

We look forward to your favorable response and if you have any questions, please contact the undersigned at 954-476-3525.

Kindest regards,

A handwritten signature in red ink that reads 'Gail P. Birks'.

Gail P. Birks, EMBA, LMBB, IATA
President/CEO, Mediator



WHY SHOULD YOU CHOOSE US?

- The CMA Team has been ***repeatedly successful in raising our client's level of maturity and enhancing your capability and capacity*** through performance and consulting and training that delivers AHA Moments™ again... and again for nearly 25 years.
- ***We average 4.5-5 on a 5 point rating scale for our training engagements***
- ***Over 95% of our Customers are referral or repeat engagements***
- ***We understand*** that in order to bring success methodology to our clients, ***we first need to listen... Then we customize our prescription.***
- Our offerings are ***available 24/7/365*** through our full service online platform.
- Our training “tool boxes,” coaching and consulting methodologies are designed to ***teach you how to “FISH.”***
- ***Our training products*** are designed to ***provide you with practical, best practices*** that are ***easy to understand and implement*** using the “toolboxes” that accompany our courses.
- ***Our Trainers*** and Consultants have ***walked in your shoes... Really!!!***
- We are ***known for getting the sustainable results*** that we get for our clients
- When you hire The CMA Team, you are getting ***Senior Level Practitioners***



Lead Coach/Consultant



Gail Birks, EMBA, LMBB

Gail Birks is the founding Principal with CMA Enterprise Incorporated. Professionally, Ms. Birks has served the South Florida Business community for nearly nine years as a Middle Market Assistant Vice President with Southeast Bank, NA and SunTrust/Miami, NA respectively. She holds a Bachelor Degree in Economics and Finance from Tennessee State University in Nashville, Tennessee where she was also enrolled in the University's Honors Program. She is a graduate of the Executive MBA Program at Florida International University and has completed post-graduate work in the area of Industrial Psychology and Personnel Staffing and Administration. She was also voted "Best Presenter" by her 1999 graduating class.

Ms. Birks is also a Certified Mediator and Arbitrator for the Florida State Supreme Court. Her Certifications encompass Circuit/Civil, County and Residential Mortgage Foreclosure. She has extensive experience in mediating conflicts in the workplace, customer service grievances, contract disputes, insurance claims, employee relations (and supervisor/employee matters.).

Ms. Birks has served as an **Independent Corporate Director since 1994**. During her tenure as Chairperson of the CRA Committee, the Bank has received numerous Community Awards and recommendations of "Outstanding" and "High Satisfactory" ratings from regulatory agencies (OTS and OCC).

She has been a part of the governing body of a financial institution that began as a privately held organization before merging in 2005 with a publically traded financial holding company and repurchased by private investors in 2009. Ms. Birks also has over 30 years of experience in board leadership and an expertise in board development and governance having served on and consulted numerous non-profit and civic boards in South Florida. In 2012, Ms. Birks received an invitation from the NYSE to attend a conference of Diverse Independent Corporate Board of Directors in NYC

And in June, 2013, she was a featured panelist for a workshop on "Enterprise Risk Management. A Director's Perspective" and the American Leader's Conference. Ms. Birks was also named as a "Director to Watch in 2014" by **Directors and Boards Magazine** (September Issue).

Ms. Birks, a published author of four books, holds an advanced ***Certification in Lean Six Sigma***. She is a ***Lean Master Black Belt through her matriculation at Florida Atlantic University*** (September, 2013). Her other professional certifications include but are not limited to the following: Certified Total Quality Management Training, Certified Self-Directed Workgroup Training, Advanced Sales Training and Management Credit Training. In 2006 Ms. Birks was selected to be a Protégée with Accenture, LLC at the national level in their Inaugural Mentor/Protégée Program.

Her consulting and business concepts have been featured in numerous cover stories in the Miami Herald and other South Florida Circulars. She has raised the awareness of grassroots and corporate clients through her consulting and training exercises, resulting in heightened awareness in the areas of organization and cultural diversity, self-directed workgroups and high performance teams, and process improvement. She has designed and facilitated sessions as well as consulted on a local, regional and national levels for public, corporate and nonprofit organizations.

Ms. Birks' honors include: 2012 Top 100 Most Influential Black Professionals in South Florida – ICABA; Top 50 Most Powerful Black Professionals in South Florida -2011; Alpha Kappa Alpha Sorority, Inc., Top Hat Award in Business and Entrepreneurship - 2008; Greater Fort Lauderdale Chamber of Commerce Women's Council of Commerce Circle of Excellence Award in Business – 2007; "In The Company of Women", Miami Dade County – 2001; National Association of Business and Professional Women Business Champion – 2001; FIU- Executive MBA Class of 1999, "Best Presenter"; JM Family Enterprises African American Achiever



Session One: The Readiness Matrix

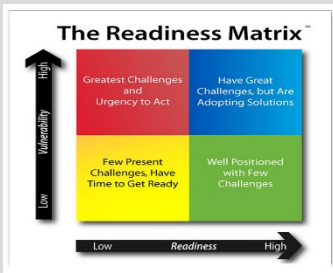


Sessions

Session Agenda

Intended Outcome

Session 1:



- **Icebreaker: Getting Ready**
- **The Culture of our Leadership...**
- **Organization Maturity & Culture**
- **Managing New Expectations**

- Participants will obtain a foundation of the course series content and expectations, their own and that of the agency.
- Confirmation of..."Are you still part of the status quo or are you willing to step out and take a chance on doing something different.
- Reflecting on the DiSC experience, did it raise an awareness for you about why team member differences or synergy can happen?
- Are you more aware about your starting point?
- Understanding if their accountability plan will require ease of implementation and/or integration into their daily activities.

4 hour session



Session Two: Communication Strategies Part 1: Managing Conflict



Sessions

Session 2: Communication Strategies Managing Conflict



Session Agenda

- Icebreaker: Implicit Bias
- Being Prepared When It Comes... And It Will!!!!
- Owning the Resolution
- Getting to the Root Cause of the Matter

Objective:

Introduce (Re-acquaint) Participants with Communication Strategies to effectively interact with peers or staff when challenges need to be managed effectively.

Intended Outcome

This module starts the journey with helpful hints on setting the stage for sustainable resolution and the accountability therein.


- Cover how we tend to filter relationships based on our experiences (or lack of) with others
- Show participants that conflict does occur when we are not clear in our message delivery (direct or indirect).
- Understanding how to frame the dialogue and/or meeting with the people / individual where you are is important.
- Delving deeper into what makes an effect leader is understanding accountability and expectations. Sustainable success is based on understanding how to position and evolve.
- Participants will be introduced to the key tools for mediating conflict in the workplace.

4 hour session



Session Three: Communication Strategies Part Two: Building Trust



<u>Sessions</u>	<u>Session Agenda</u>	<u>Intended Outcome</u>
<p>Session 3: Communication Strategies Part II: Building Trust... Step One in Transformation</p> 	<p>Agenda</p> <ul style="list-style-type: none"> • Icebreaker: Lessons Learned • Is it really me? • But we have been BFFs forever... • Coaching Your Team means... <p>Objectives:</p> <ul style="list-style-type: none"> • Explore the pros and cons of Peer today... Boss Tomorrow • Clear and Transparent Messages shared with your “Constituents” • Delivering that message for transformation • Next Steps 	<p>This module is designed to mirror what leaders should be doing to ensure that their “Garden” flourishes.</p> <ul style="list-style-type: none"> • Provide an overview of some basic strategies for setting performance metrics in the group’s department and/or the organization. • The importance of making sure that you “First seek to understand and then be understood.” • Discovering that it takes a lot of creativity when trying to be clear and transparent. • A conversation with self. The most important dialogue that should happen but rarely does is the one around transitioning to an official leader with the title and responsibility. And sharing that things have changed a little...

4 hour session



Session Four: Performance Metrics



<u>Sessions</u>	<u>Session Agenda</u>	<u>Intended Outcome</u>
<p>Session 4: Performance Metrics...</p>  <p>Session Four: Performance Metrics</p>	<p>Agenda:</p> <ul style="list-style-type: none"> • Icebreaker: Catapults • Building Your Strategy for Organization Transformation • Preparing for the Appraisal Session • the Feedback Session • Next Steps <p>Objectives:</p> <ul style="list-style-type: none"> • Raise Leadership Awareness with a Transformation Toolbox • Manage to your Capacity and Capability as a Leader using the Organization Transformation Toolbox • Learn to facilitate timely and constructive (proactive) feedback to the “appropriate player.” • Creating a uniform “RULES OF ENGAGEMENT FOR EFFECTIVE LEADERSHIP 	<ul style="list-style-type: none"> • Provide an overview of some basic strategies for setting performance and process metrics in the group’s department and/or the organization. • To get the leaders to start thinking in similar terms, how to build their success models that have everyone’ “touching it”. • Being prepared is essential when a leader must give a message that may not be positive or one of “a change is coming”. Good for the organization Maybe not for those who relish the status quo. • Lay the groundwork for mentoring and coaching. • The opening message is critical to setting the tone of the session. • Expose the participants to some of the do’s and don’ts of performance evaluations and the challenges of when the process is broken.

4 hour session

Session Five: Time and Resource Management



<u>Sessions</u>	<u>Session Agenda</u>	<u>Intended Outcome</u>
<p>Session 5: Time Management and Resource Management</p> 	<p>Housekeeping and Introductions</p> <p>Session Objectives:</p> <p>Icebreaker: Lessons Learned</p> <p>Procrastination</p> <p>Prioritizing Our Time and Energy</p> <p>Resource Management</p> <p>Next Steps</p>	<ul style="list-style-type: none"> • Explore why we either wait until the final moment or find the excuse to do/not do. • Raise awareness of the “Why” in Why do we procrastinate. And as leaders, we need to set not only the tone, but the example when it comes to moving the needle forward. • Set strategies on realistic goals and building a new script. • Explore the “D-word” that we refer to as Delegation. • Learning how to “Just Say No” is not always a bad thing • Introduce the group to the other considerations of being a leader, Risk Management and resource Management

4 hour session



Session Six: Serving Our Customers



Sessions

Session Agenda

Intended Outcome

Session 6: Serving Our Customers



Agenda

- Housekeeping
- Agenda & Objectives
- Lessons Learned... The Childnet Universe
- Managing through the Clutter... Sometimes, I just need you to hear me
- Performance is based on What you have to work with...
- Customer Satisfaction ... Maximizing the Customer Experience

Participants will share their experiences from their Leadership Category perspectives with the entire group. This segment will provide a more global insight that the learning process never stops, but intensifies the longer we are out here in this complex world and the higher we go in our professional lives.

- Participants who happen to also be leaders are exposed to the concept of floating leadership. Specifically, egos aside and focused on the intended outcomes desired by their client.
- Effective managers who embrace sustainable success tend to cross the lines of the organization chart and identify resources that can aid in maximizing the client experience because they REMEMBER FROM WENCE THEY'VE COME.
- Heighten awareness with participants regarding all of the touch points and "players" that impact the level of excellence for our clients, internal and external
- Recap the current session, but most important the "Lessons learned along the way" ... Did I move my Cheese?

4 hour session



Client References

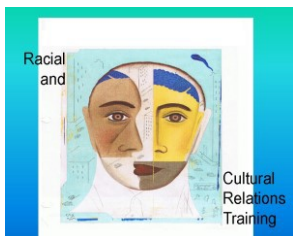


Client Name	Contact Person	Phone/ email
City of Miramar	Randy Cross, HR Director	rmcross@miramarfl.gov 954-602-3800
	Ron Tuttle, Training Manager	Rtuttle@miramarfl.gov 954-602-3622
	Dr. Karen Hollis, Office of	kehollis@miramarfl.gov 954-602-3135
City of Hallandale Beach	Beverly Sanders Mayweather – DHS Director	954-457-2994 bsanders@hallandalebeachfl.gov
City of Lauderdale Lakes	D’Andrea Giddens-Jones – HR Director	954-535-2710 dandreag@lauderdalelakes.org
Polk County Government Bartow, Florida	Deborah Pacheco – Training Manager	863-262-9469 DeborahPacheco@polk-county.net
James Amps AMPS International LLC	James Amps President	954-668-8088 ampscomm@gmail.com



Training Samples and References

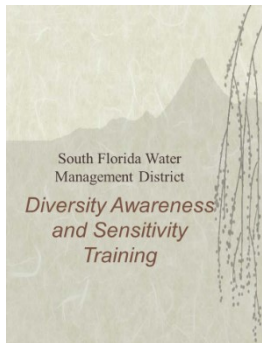
Partial list



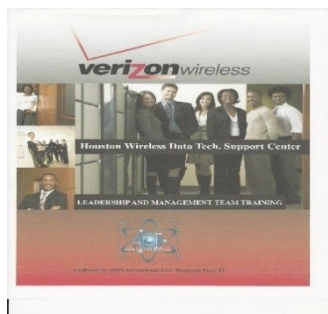
Polk County Government Employee Relations and HR Kandis Baker Buford, HR Director **863-534-6075**
kandisbuford@polk-county.net
hired to customize and facilitate open enrollment training

Race and Cultural Relations Training: A Conversation for Common Ground
Annually Since 2008 – ongoing

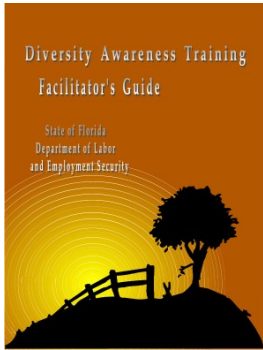
Emerging Leaders Training 2017, 2018



AMPS International/ South Florida Water Management District
James Amps, President
954-668-8088
ampscomm@gmail.com Hired to design and facilitate
(Corrective Action EEO Training)
Naples, Florida
Leadership and workforce tracks



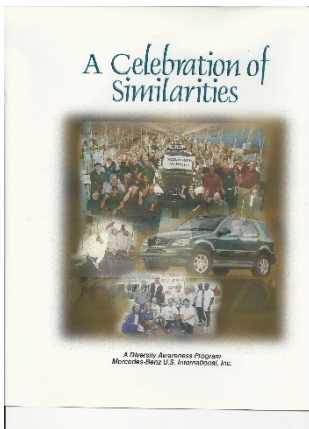
AMPS International James Amps, President 954-668-8088
ampscomm@gmail.com Hired to design and facilitate Verizon Wireless
Houston, TX and Albuquerque, NM
Leadership and Diversity Awareness Training



Florida Department of Labor and Employment Security Tallahassee, Florida
 (Curriculum Design for Train The Trainer; Facilitate the Train the Trainer Session)
 Company wide initiative

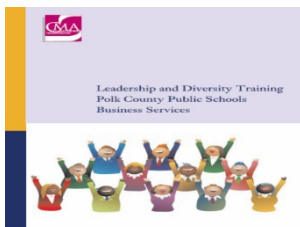


Miami Dade County Department of Health Miami, Florida
 Internal Customer Satisfaction and Needs Assessment
 Diversity Awareness and Sensitivity Training 800+ employees trained
 (Manager and General Workforce Track)



Mercedes Benz U.S. International Vance, Alabama
 (Company wide Initiative)

- Design/Modify Diversity and Inclusion Training Program Review and Enhanced Civil Treatment Policies and Procedures
- Developed Mentoring Program for Team Members Facilitated Leadership and General Workforce Training



Polk County Schools – Business Services Division and Facilities , Bartow Florida (Department leaders)
 Hired to design and facilitate See Attached Letter of Endorsement
(Leadership and Diversity Session) – Managers and Supervisors only



Other HR Engagements

(partial list)

Client and Timeframe	Service	Outcome
City of Hallandale Beach HHS Department 2017	<p>Engaged to conduct a leadership culture assessment for the HHS Department. Also tasked with Executive Coaching of the Director and Deputy Director. CMA provided 5 sessions over a 4 month period.</p> <p>Facilitate a 36 hour capacity building session to improve leadership skills in managing the Department using Lean Principles.</p>	<p>The assessment assisted CMA in building strategies to minimize and/or eliminate the toxic culture that existed. This was accomplished using focus groups and one on one interviews within the department.</p>
Tulane University Nov. 2017 – March 2018	<p>Facilitated and coached 2 groups of HR administrators on Project Management and Process Mapping. The engagement was designed as a “Train the Facilitator” . The Client’s intent was to acquire the skills needed to strengthen the culture of the Department and hence their external customer.</p>	<p>Certified over 52 HR Staff in Lean Six Sigma Process Mapping (White Belt Level) and obtained Certificates of Completion in Project Management Courses Each Group prepared 3 process maps. Heightened skills to be used for improved Customer Service.</p>
City of Lauderdale Lakes 2016-17 2014 2009	<p>Engaged to provide Executive Coaching services to Director and Assistant Director in Financial Services department.</p> <p>Engaged to provide strategic team building for Finance Department</p> <p>Engaged to conduct a leadership assessment for the Park and Recreation Department . The activities included conducting 360 assessments on the division leadership in order to understand the culture that currently existed. Additionally, focus groups with the Department staff.</p>	<p>New Communication skills were acquired and ultimately applied. Morale of the Coaching Participants rose and it translated to the overall workforce as a result of the conflict having been managed by the one on one coaching.</p> <p>The half day session provided relationship building opportunities for the group.</p> <p>The findings resulted in strategies included recommendations for the leadership to build a more inclusive decision making environment, heightened communication skills, and empowered director who now possessed information on to guide his team to sustainable success</p>
City of Miramar 2018 HR/Fire Rescue	<p>Engaged to provide coaching to one of the Senior Crew Leaders who was accused of creating a hostile work environment</p>	<p>The intent of the session was to create a new awareness of the results of “not taking the time” when the moment requires a calm facilitator. The Coaching Participant was able to grasp the empowerment tools introduced that assisted him in addressing these types of issues when they arise in the future.</p> <p>Also accomplished was the re-establishment of the Coaching Participant’s self esteem which was challenged as a result of the encounter that resulted in the session requirement.</p>



Other HR Engagements involving Coaching

Client and Timeframe	Service	Outcome
Vertilux Ltd July 2010 – May 2011	<p>The Consulting Team of CMA Enterprise Incorporated (“CMA”) has been engaged by the Executive Management of Vertilux, LTD, of Miami-Dade, Florida (“Client”) to examine the Human Resources Processes as it relates to the impact of operational efficiencies and effectiveness and ultimately the organization’s ability to sustain itself and ultimately grow its market share.</p> <p>Also provided coaching to the COO and CEO on the results and built strategies on implementation of the findings.</p>	<ul style="list-style-type: none"> • Establish strategic implementation recommendations for improving deficiencies identified • Opportunities to raise morale among the general workforce and leadership. • Identify opportunities maximize the existing workforce talent • Creating inclusive decision making environment • Build a platform that endorses efficiency and collaboration by management and supervisory levels.
City of Opa Locka Human Resources January 2012 to March, 2012	<p>This report has been requested by the Office of the City Manager and the Human Resources Director in an effort to obtain a snapshot of operating conditions of the Department in areas that include:</p> <p>Operating policies and procedures Adequate staffing Infrastructure Risk management Personnel Board Safety and preparedness plans Workforce training and development initiatives</p>	<p>The intended outcome of this report is to assist the City Leadership noted in building a functional department that can serve the Municipality efficiently, effectively and profitably.</p> <p>One on one coaching was also provided to the director with regard to strategies on implementation and collaboration while managing the municipality politics</p>
City of West Palm Beach – Public Utilities April 2015- December 2016	<p>Provided group coaching to managers at all levels who were tasked with building a business case for improved processes within the Utilities department.</p> <p>Certify 16 Candidates in Lean Six Sigma Green Belt .(4 project teams)</p>	<p>Identified time savings in procurement department, enhanced morale and improved risk management processes in Risk Management Department, Generated better equipment and meter management in the Meter reading division, identified cost savings in the fleet division using process mapping and other lean tools.</p>