



**Proposal Submitted to:**

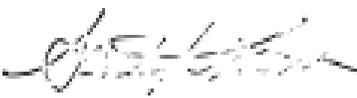
**RFP #1629-041416  
Request for Proposals  
for**

**PROFESSIONAL CONSULTING SERVICES TO ASSIST THE CITY COUNCIL WITH ITS  
EXECUTIVE EVALUATION PROCESS FOR COUNCIL APPOINTED EMPLOYEES**

**MAY 6, 2016**

**Proposal Submitted by:  
Santalynda Marrero, EdD  
SM Consulting & Associates**

**TO:  
Human Resources Department  
Attention: Nina Collins Director of Human Resources  
777B Street (3<sup>rd</sup> Floor)  
Hayward, CA 94541  
[Nina.collins@hayward-ca.gov](mailto:Nina.collins@hayward-ca.gov)**

**Signature:** 

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## Management Summary

SM Consulting & Associates will partner with of the City Council of Hayward to augment its current performance appraisal feedback process for three key council-appointed positions (City Manager, City Attorney, and City Clerk) by conducting internal 360° feedback interviews with the direct reports and peers of the three designated positions to garner input for performance criteria and direct feedback.

Dr. Santalynda Marrero and Ms. Crystal Simon will carefully listen and respond to the needs of the City Council, efficiently providing an inclusive engagement process by developing and instituting a 360° feedback cycle. A written summary of the gathered data will be drafted, vetted with the designated subcommittee and the Director of Human Resources and then finalized.

The consultants' intention for this project will be guided by:

1. relevance of recommendations to inform performance measures based on interview data
2. guidance with best practices and strategic inclusion of the City's priorities and corresponding metrics drivers around the following: Safe, Clean, Green, Thriving City fostered by a well-managed, Fiscally sustainable government, and strong and Healthy Organization.

The process will include: review of past content, including current performance agreements, position descriptions, City of Hayward Strategic Priorities, 360° feedback from peers and direct reports within the organization; generation of criteria and coaching targets for the three positions; a blend of consultative expertise and collaboration with key Council representatives, the Human Resources Director and Legal.

SM Consulting & Associates' proposal is best suited for the following key reasons:

1. *Experience* - Dr. Santalynda Marrero, who will take the lead on the project, offers over 30 years of thought leadership as a doctor of psychology, executive coach, facilitator of team performance, and facilitator of diversity and inclusion. She will be assisted by her associate Crystal Simon who brings over fifteen years of working as an organization development consultant and executive coach who drives performance improvement in government, non-profit, and corporate settings.
2. *Sector Knowledge* - This consultant team has direct and recent experience consulting with many local city government entities, including the: City of Oakland, City of Berkeley, and City of San Jose.
3. *Personal Connection* - Both consultants are long-time residents of Alameda County and have a vested interest in promoting the continued excellence of local governments in service of residents. As local consultants, no travel budget is required.
4. *Proven track record* – Lead consultant Dr. Marrero has a strong track record of excellence working as a consultant to the City of Hayward on other projects that have been successful and effective.
5. *Collaborative and Inclusive Approach* – We will engage in this project in “good faith” as we are guided by our shared values of collaboration and joint learning to create a “win-win” situation for all.

**Santalynda Marrero, EdD**  
**CEO, SM Consulting**

**Signature:**   
**Date: May 6, 2016**

## Consultant Profile

SM Consulting & Associates  
Fremont, CA 94538  
Cell Phone: 510-589-1857  
Email: [santalynda@gmail.com](mailto:santalynda@gmail.com)  
Website: [www.drsantalynda.com](http://www.drsantalynda.com)

### About the Consulting Practice

SM Consulting & Associates is a privately owned consulting practice that was launched in the Bay Area in 1997 by Dr. Santalynda Marrero after leaving Stanford Hospital and Clinics as Director of Staff Development and with 25 years of corporate experience at Bell Laboratories, AvanteK/HP Silicon Valley and Rutgers University.

SM Consulting's depth of service is achieved through a unique cross-practice environment that draws from industries leaders/experts in both public and private sectors across international organizations, health-care and high-technology industries. This range of expertise includes: organizational development; change management and transformation; strategic planning; deployment and implementation; executive, leadership, management development and performance coaching; diversity, inclusion and engagement; training; team development; process improvement; organization redesign and restructuring.

Strategic alliances have afforded SM Consulting a diverse pool of associates representing an array of experiences with industries and organizations undergoing structural, organization and cultural change. We take pride as a consulting practice that creates strategically assigned teams that are specifically aligned to meet unique needs of the client in a customized manner. At SM Consulting, we operationalize our mission by partnering with our clients in achieving and sustaining desired results. We strongly believe that when we work for desired results and collaborate we create a win-learn environment that supports mutual success between the client and consultant. Our well-established base of experience, ability to create strategic alliances, and successful long lasting relationships has served us well in the past.

Our guiding principles in practice are the same for the way we support our clients. They include:

- 1) Living diversity, inclusion and engagement at its best for value added
- 2) Generating challenge, development and self-efficacy to stay current and fluid
- 3) Loyalty and accountability while having necessary difficult conversations as needed

For this project Dr. Marrero is bringing in a colleague, Crystal Simon who is the Principal and Founder of CS Consulting, under the SM Consulting organization.

### About the Consultants

Dr. Santalynda Marrero, the primary consultant on this project, is a dynamic coach, organizational consultant, facilitator, trainer and thought leader. Dr. Marrero draws her academic discipline as a counseling psychologist and 30 years of experience to help individuals, teams and organizations propel to the next level. She is frequently called upon for her broad range of consulting, coaching, facilitation and training skills which make her adept at helping

develop individuals, teams and organizations. Recently she co-authored: The Diversity Calling: Building Community One Story at a Time (2011 Xlibris/Amazon). Her fluency in Spanish and bi-cultural status have naturally led her to successfully facilitate and train on leadership and diversity/inclusion in several countries within Latin America, including Brazil, Venezuela, and Mexico.

A sampling of Dr. Marrero's clients in the public and private and nonprofit sectors include: PepsiCo and Pepsi International, Port of Oakland, various California Counties and Cities, UCSF Medical Center, United Airlines, M.I.T., University of Michigan, Johns Hopkins University, Amgen, County of Santa Clara, Stanford Medical Center, various Fire Service organizations, Amgen, and Campbell Soup.

Dr. Marrero's projects both in the public and private sectors have included:

- Leadership Development & Coaching
- Diversity and Inclusion and Engagement
- Intercultural Communications
- Team Development
- Change and Transition Management
- Conflict Management & Resolution
- Strategic Planning & Organizational Change Management

Crystal Simon, an associate of SM Consulting collaborating on this project, is a highly-skilled professional with more than fifteen years of experience designing and implementing organizational enhancement strategies. Crystal has worked for the past 10 years as the Principal and Founder of CS Consulting. In her capacity with the firm, she offers a range of organizational development and executive coaching support for government, non-profit and Fortune 500 clients. With her expertise, Crystal's clients have experienced increases in team and individual performance, enhanced their performance management systems, and equipped leaders and staff for success. Crystal has many years of experience and extensive training as a leadership coach and is skilled in facilitating collaborative processes.

### **About the Approach & Experience**

Both consultants have extensive focus interviewing, facilitation and design experience with public and private sectors. They work effectively with diversity and engagement across levels within an organization.

Dr. Marrero designed an entire Performance Appraisal process and related content for executives, mid-managers, supervisors and staff for both Avantek and Stanford University Hospital.

As part of her work Dr. Marrero:

- developed criteria based on past performance evaluation feedback
- conducted focus interviews across levels and functions within the organization
- considered review of employee and customer feedback in criteria development
- vetted criteria across levels and made them uniform for all with specific measures aligned to level within the organization (i.e. management-level direct budget responsibilities vs. staff impact on budget spending for appropriate application of measures)

- incorporated inclusive leadership criteria specific behavior measures.

Currently and for the past five years, Dr. Marrero has provided in-classroom and web-based training in performance coaching skills development for managers at Amgen.

Ms. Simon has experience working as a senior consultant on strategic organization design and performance enhancement projects with several clients, including the Oakland Unified School District and Transport for London. She has worked to:

- assess baseline performance levels of executives and staff
- recommend best practices related to performance goals
- develop performance metrics for individual staff members tied to team and organization success metrics
- coach executives and leaders on methods to enhance performance for a range of staff from under-performers to high-achievers.

### Description of the Work

Dr. Marrero and Ms. Simon will work collaboratively to perform the following work in service of this project:

Project Components	Activity
1. Information review	<ul style="list-style-type: none"> <li>▪ Review relevant background documents</li> </ul>
2. Information gathering and design input	<ul style="list-style-type: none"> <li>▪ Conduct executive dialogue meetings with key players to listen and engage their input into the feedback process</li> <li>▪ Design 360° interview guides</li> </ul>
3. Gather 360° feedback	<ul style="list-style-type: none"> <li>▪ Conduct 360° interviews with the City Council, peers and direct reports of three designated positions</li> </ul>
4. Analyze and summarize key data	<ul style="list-style-type: none"> <li>▪ Analyze data collected via 360° interviews</li> </ul>
5. Vet draft summary	<ul style="list-style-type: none"> <li>▪ Collaborate on final summary of findings</li> <li>▪ Finalize Executive Summary</li> </ul>
6. Deliver recommendations and best practices	<ul style="list-style-type: none"> <li>▪ Present closing recommendations to process and a summary of recommended best practices</li> </ul>

*Note: Additional information regarding the qualifications, education and work experience of both consultants is included in the form of resumes in the appendix of this document.*

## Response to Proposal

SM Consulting appreciates the opportunity to respond to the request for proposal to provide consulting services to assist the City of Hayward's Council with augmenting its evaluation process for three Council-appointed employees. We are clear that this process engages staff, peers, Human Resources and Council in dialogue to create meaningful and strategic feedback aligned to the City's priorities and metrics.

### References

#### References for Dr. Santalynda Marrero

1. Client: Port of Oakland  
Date of Services: 2000 – 2010  
Address: University of Berkeley International House, 2299 Piedmont Avenue, Berkeley, CA 94720 (current work address of reference)  
Contact Person: Deborah Preston, Director of Human Resources  
Phone: (510) 645-5308  
Fax Number: None  
E-mail address: [lalannadp@berkeley.edu](mailto:lalannadp@berkeley.edu)

Performed a range of services over a 10-year period, including: interviewing, facilitation, conflict resolution, performance management, and team development for leaders from the executive director through frontline employees across multiple functions within the Port of Oakland.

2. Client: City of Oakland  
Date of Services: 2000 - Present  
Address: 250 Frank H. Ogawa Plaza, Suite 4315, Oakland CA 94612  
Contact Person: Brooke Levin, Director of Public Works  
Phone: (510) 238-4470  
Fax Number: (510) 238-6428  
E-mail address: [blevin@oaklandnet.com](mailto:blevin@oaklandnet.com)

Perform a range of projects across several city agencies including, the Office of the City Manager and the Fire Department. Areas of focus include: Team development, conflict resolution, leadership development, strategic planning, retreat facilitation, focus interviews, and more.

3. Client: Gaich & Associates  
Date of Services: 1988 - 2000  
Address: Pastuer Drive, Stanford, CA 94305  
Contact Person: Nick Gaich, Chief Executive Officer  
Phone: (408) 722-1566  
Fax: None  
E-mail address: [info@ngahealthcareconsulting.com](mailto:info@ngahealthcareconsulting.com)

Performed a range of services over 12 years in her role as Director of Staff Education and Development providing facilitation, performance review design for management and

non-management staff, conflict resolution, strategic operational redesign, coaching, and related services.

### References for Ms. Crystal Simon

1. Client: Abode Services  
Date of Services: 2014 - Present  
Address: 40849 Fremont Blvd, Fremont, CA 94538  
Contact Person: Paula Cartwright, Human Resources Manager  
Phone: (510) 657-7409 x 208  
Fax Number: (510) 270-3259  
E-mail address: [pcartwright@abodeservices.org](mailto:pcartwright@abodeservices.org)  
Perform a range of services over a 2 year contracted period, including: collaborative design of an intensive 9 month leadership academy to enhance the performance and effectiveness of managers within the agency; provided thought partnership and counsel to agency executives to drive performance improvement and to integrate best practice to maximize agency effectiveness.
2. Client: General Electric  
Date of Services: 2014  
Address: World 50, Inc., 3525 Piedmont Road, NE, Building 7 Suite 600, Atlanta, GA 30305 (current work address of reference)  
Contact Person: Simeon Sessley, Director of Strategic Programs (former Innovation Leader at General Electric)  
Phone: (404) 290-4614  
Fax Number: None  
E-mail address: [simeon.sessley@world50.com](mailto:simeon.sessley@world50.com)  
  
Performed a range of services over a one year contracted period, including: collaborative design of a coaching framework and coaching training process for hundreds of global executives; gathering information via interviews and background documentation to design custom workshops; facilitation of executive trainings; executive coaching.
3. Client: Single Stop USA  
Date of Services: 2010  
Address: 4600 Roswell Road, #333, Atlanta GA 30342 (current work address of reference)  
Contact Person: Kristen Mehr, Business Owner (former Lead Consultant at Kristen Mehr Consulting)  
Phone: (404) 991-0055  
Fax Number: (404) 604-3801  
E-mail address: [Kristen@trulyfinehomes.com](mailto:Kristen@trulyfinehomes.com)  
Performed a range of services over a one year period, including: collaborative development of a technical assistance framework and tools to support performance of five Bay Area non-profit agencies.

Also performed additional work with Kristen Mehr in the Executive Office of the Mayor in the District of Columbia from 2004-2005.

## General Statement of Experience

### Santalynda Marrero, Ed. D.

Dr. Marrero has experience that is directly relevant to this project with coaching a broad range of clients within all levels of an organization. Her approach to coaching is client-centered with a 360° focus. Coaching is about the person as a whole person, including values, goals, work, balance, fulfillment, and life purpose. She works with highly motivated individuals to develop a shared plan to address the transition challenges in management styles, expectations, challenges for authenticity, work performance and more as defined with the client for organization alignment. She has worked as an internal and external consultant to the City of Oakland, City of Berkeley and Santa Clara County in leadership development and performance coaching.

### Crystal Simon

Dr. Marrero's associate for this project, Crystal Simon, also has experience coaching a range of clients across all levels of many organizations. Her approach focuses on deep listening for the client's values and goals across the aspects of their professional and personal lives. She works with leaders to clarify their performance goals, and offers thought partnership to create the desired outcomes. Ms. Simon has worked as an internal and external consultant to a range of agencies including the City of Oakland, the Oakland Unified School District, and the Government of the District of Columbia.

## Operational Plan

SM Consulting's approach for delivering this type of engagement is typically based on the following phases:

Phase I Plan the Work: It is important to review existing agreements, performance measures, organization guiding principles, values, vision and priorities. [Note: All documents that provide feedback relevant to the project shared will be kept in the utmost confidence.]

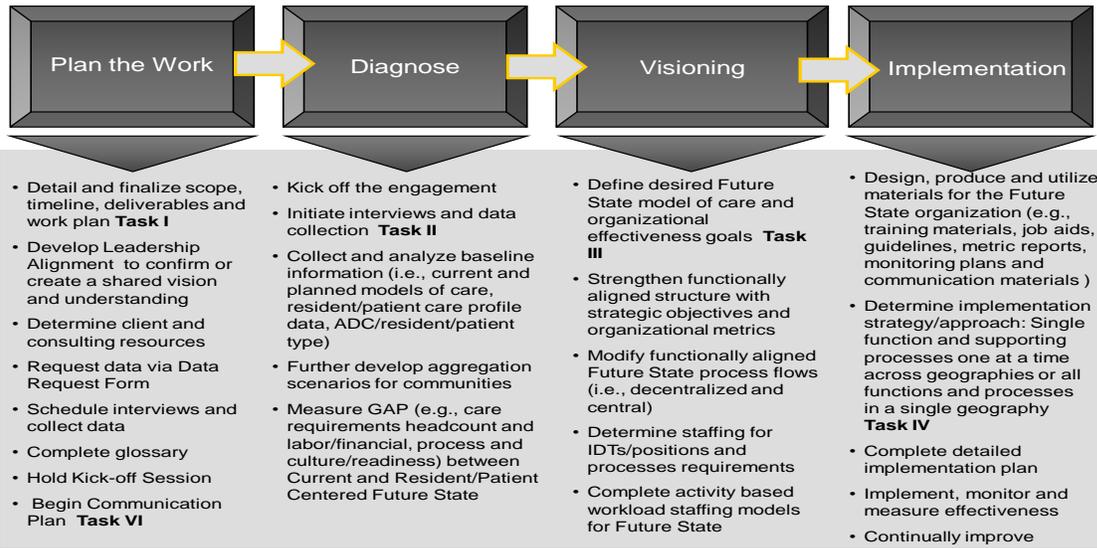
Phase II Diagnose: Direct dialogue and listen for joint clarification of the expected outcomes within and beyond what is posted in the RFP and mutual engagement in guiding the process

Phase III Visioning: Stakeholder engagement (Council, senior level, peer and staff interviews and 360° analyses) is imperative for a thorough understanding of any potential gaps, needed dialogue and further development of the performance tool.

Phase IV Implementation: The process needs to be fully planned so that a successful rollout strategy can be achieved with outcome of a report summary and recommendations that incorporates inputs and best practices.

The chart below offers a detailed example of the approach SM Consulting uses for client engagements:

## Phased Approach: Planning, Diagnostic, Visioning and Implementation



**Note: SM Consulting Approach Roles: Co-leadership, Facilitation, Thought Partners/Thought Leaders**

## Project Timeline

Projected Timeline: June 2016 - October 2016 (Flexible based on client expectation)

Timeline	Phase	Summary of Work
June – July 2016 <i>Document Review</i>	Phase I: Plan the Work	<ul style="list-style-type: none"> <li>Review: existing agreements; performance measures; organizational guiding principles, values, vision and priorities.</li> </ul>
August – September 2016 <i>Vetting focus 360° interview process and executive dialogue meeting(s)</i>	Phase II: Diagnose	<ul style="list-style-type: none"> <li>Direct dialogue for joint clarification of the expected outcomes beyond what is posted in the RFP and mutual engagement in guiding the process.</li> </ul>
September – October 2016 <i>Design and facilitate interviews and organize preliminary findings</i>	Phase III: Visioning	<ul style="list-style-type: none"> <li>Conduct Council, senior level, peer and staff interviews and 360° analyses to understand any potential gaps, needed dialogue and further development of the performance feedback process/tool.</li> </ul>
October 2016 <i>Best practices and recommendations dialogue</i>	Phase IV: Implementation	<ul style="list-style-type: none"> <li>Present executive summary report and recommendations</li> </ul>

## Fee Structure

The proposed hours of work are outlined below and total 70 hours. A rate of \$225 per hour will be charged. The expected total cost is \$15,750. The breakdown of activities and estimated hours are as follows:

Project Components	Activity	Estimated Hours
1. Information review	Review relevant background documents	5
2. Information gathering and design input	Conduct executive dialogue meetings with key leaders to gather their input into the feedback process; design 360° interview guides	15
3. Gather 360° feedback	Conduct 360° interviews with the City Council, peers and reports of three designated positions	30
4. Analyze and summarize key data	Analyze data collected via 360° interviews; summarize key findings and develop an Executive Summary	15
5. Deliver recommendations and best practice	Present recommendations and a summary of relevant best practices	5
		TOTAL: 70 hours

Direct executive coaching is available, but not included in this proposal.

SM Consulting would like to directly invoice the client on a monthly basis for the hours worked during that period, and requests that the client provide payment within 30 days of receiving each invoice.



# CERTIFICATE OF LIABILITY INSURANCE

DATE(MMDDYYYY)

4/26/2016

<b>PRODUCER</b> <b>Professional Insurance Associates</b> <b>P O Box 1266</b> <b>San Carlos, CA 94070</b> <b>650 592 7333</b>	THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW.												
<b>INSURED</b> <b>Santalynda Marrero, Ed D</b> <b>SM Consulting</b> <b>4474 Red Oak Common</b> <b>Fremont, CA 94538</b>	<table border="1"> <tr> <th>INSURERS AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> <tr> <td>INSURER A: <b>CNA Insurance Co.</b></td> <td></td> </tr> <tr> <td>INSURER B:</td> <td></td> </tr> <tr> <td>INSURER C:</td> <td></td> </tr> <tr> <td>INSURER D:</td> <td></td> </tr> <tr> <td>INSURER E:</td> <td></td> </tr> </table>	INSURERS AFFORDING COVERAGE	NAIC #	INSURER A: <b>CNA Insurance Co.</b>		INSURER B:		INSURER C:		INSURER D:		INSURER E:	
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INSURER A: <b>CNA Insurance Co.</b>													
INSURER B:													
INSURER C:													
INSURER D:													
INSURER E:													

**COVERAGES**

THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. AGGREGATE LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INS LTR	POL. CODE	TYPE OF INSURANCE	POLICY NUMBER	POLICY EFFECTIVE DATE(MMDDYYYY)	POLICY EXPIRATION DATE(MMDDYYYY)	LIMITS
		<b>GENERAL LIABILITY</b> <input type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMSMADE <input type="checkbox"/> OCCUR GENT. AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC				EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$
		<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANYAUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS				COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
		<b>GARAGE LIABILITY</b> <input type="checkbox"/> ANYAUTO				AUTO ONLY - EA ACCIDENT \$ OTHER THAN EA ACC \$ AUTO ONLY: AGG \$
		<b>EXCESS / UMBRELLA LIABILITY</b> <input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMSMADE DEDUCTIBLE \$ RETENTION \$				EACH OCCURRENCE \$ AGGREGATE \$ \$ \$ \$
		<b>WORKERS COMPENSATION AND EMPLOYERS LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory NH) If yes, describe under SPECIAL PROVISIONS below OTHER <input type="checkbox"/> Y/N				WC STATUTORY LIMITS <input type="checkbox"/> OTHER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
<b>B</b>		<b>Professional Lia</b>	<b>287432878</b>	<b>9/22/15</b>	<b>9/22/16</b>	<b>\$1,000,000 per occ</b> <b>\$1,000,000 aggregate</b>

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES / EXCLUSIONS ADDED BY ENDORSEMENT / SPECIAL PROVISIONS

The below certificate holder is hereby named as "Additional Insureds" to the above policy

<b>CERTIFICATE HOLDER</b> <b>City of Hayward</b> <b>Mayor, City Council members</b> <b>Human Resources Director Nina Collins</b> <b>777 B Street</b> <b>Hayward, CA 94541</b>	<b>CANCELLATION</b> SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, THE ISSUING INSURER WILL ENDEAVOR TO MAIL <u>30</u> DAYS WRITTEN NOTICE TO THE CERTIFICATE HOLDER NAMED TO THE LEFT, BUT FAILURE TO DO SO SHALL IMPOSE NO OBLIGATION OR LIABILITY OF ANY KIND UPON THE INSURER, ITS AGENTS OR REPRESENTATIVES. AUTHORIZED REPRESENTATIVE <i>Joan Applebome</i>
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CITY OF HAYWARD HEART OF THE BAY

AFFIRMATION ON NON-INVOLVEMENT IN DEVELOPMENT OF PRODUCTION OF NUCLEAR WEAPONS

The undersigned hereby certifies:

That it understands that City of Hayward Ordinance No.87024 C.S. prohibits award of contract to, or purchase of goods or services from, "any person which is knowingly or intentionally engaged in the development or production of nuclear weapons."

That it understands the ordinance defines "Nuclear Weapon" as "any device the intended explosion of which results from the energy released by fission or fusion reactions involving atomic nuclei."

That it understands the ordinance defines "Person" as "any person, private corporation, institution or other entity "

As the owner or company official of the firm identified below, I affirm that this company is not knowingly or intentionally engaged in such development or production.

JM Consultancy
Print/Type Company Name

CEO, Santalynda Marrero, EdD
Print/Type Official Name & Title

4474 Red Oak Common
Company Address

[Signature]
Signature of Company Official

Fremont, CA 94538
City/State/Zip Code

4/26/16
Date

Department of Finance Purchasing Division

777 B Street Hayward CA 94541-5007
Tel 510-583-4800 • Fax. 510-583-3600 Website www.hayward-ca.gov



CITY OF  
**HAYWARD**  
HEART OF THE BAY

NONDISCRIMATORY EMPLOYMENT PRACTICES  
AND  
AFFIRMATIVE ACTION CERTIFICATION STATEMENT

The Respondent to a City of Hayward Request for Proposals/Request for Quotation hereby certifies that it is in compliance with all executive orders, federal and state laws regarding fair employment practices and nondiscrimination in employment.

1. That it shall demonstrate compliance with the requirements established in the Affirmative Action provisions (EEO) for supply and services contracts.
2. That it fully understands that the provisions contained in the City's special Affirmative Action provisions shall be considered a part of its contractual agreement with the City in the event of award of contract.
3. That it is in compliance with all executive orders, federal, state and local laws (including Hayward Municipal Code Chapter 2, Article 7) regarding fair employment practices and nondiscrimination in employment.

Santalynda Marrero, EEO      CEO      SM Consulting  
(Print/Type Name of Company Official)      (Title)

[Signature]      4/26/14  
(Signature of Company Official)      (Date)

Name of Project: Professional Consulting Services To Assist City Council with  
its Executive Evaluation Process for Council Appointed Employees  
Name of Firm: SM Consulting & Associates

Address: 4474 Red Oak Common      Fremont, CA 94538  
Street Address      City/State/Zip

Telephone: (510) 589 1857      )

Please check below as appropriate:

- Prime Contractor      ) Subcontractor      ) Professional Services  
Supplier of Goods      Supplier of Services

DEPARTMENT OF FINANCE  
777 B STREET, HAYWARD, CA 94541-5007  
TEL 510/583-4802 • FAX 510/583-3600 • TDD: 510/583-3340

# Santalynda M. Marrero, Ed. D.

## SM Consulting & Associates

[www.drsantalynda.com](http://www.drsantalynda.com)

### Specialty

I am professionally trained as a counseling psychologist. I have 30 plus years experience both as a practitioner and manager in the fields of Education, Training and Development, Leadership and Organization Development and Diversity and Inclusion. My career as both an internal and external consultant in an array of environments has given me the ability to work with a diverse client population throughout private and public sectors. Coaching and a dedicated focus on “Fire Breathing Women/Mujeres Que Respiran Fuego.”™

For the last 25 years, I have successfully managed SM Consulting and Associates. As the founder and CEO I have been afforded the opportunity to work independently and collaboratively throughout the United States and in Latin America. **Core to all my work is diversity and inclusion to leverage the best and individuals and organizations have to offer. Providing client engagement and building trust has generated mutual success, repeat business and ongoing professional relationships.**

Projects have included: strategic planning retreats, customized training workshops, team development with intact work groups, individual and organizational assessment, facilitation and executive coaching.

Being **bilingual, bi-cultural and bi-literate** has afforded me the opportunity to be resilient and flexible in a way that allows me to build rapport and accept people and organizations for where they are and not where I want them to be. Staying open helps engage the client and working collaboratively realize the vision.

### Experience

#### 1990 - Founder and CEO, SM Consulting & Associates to Present

- Public Sector: Cities: San Jose, Berkeley, Fremont. Union City, Redwood City. Counties: Santa Clara, Alameda, and Orange.
- Corporate Partial List: PepsiCo USA & International, United Airlines, Raytheon, Stanford Medical Center and Clinics, UCSF Medical Center, Laguna Honda Hospital, University of Texas Medical Center, Amgen, and Xerox.
- Academia Partial List: Rutgers University, M.I.T, University of California, Utah State, and University of Michigan, UC Berkeley.

#### 1988-2000 Stanford University Hospital and Clinics

##### Director of Staff Education and Development

Provided assessment, new hire orientation, executive coaching, team development, supervisory and managerial training, conflict resolution, leadership and organization development throughout all levels and across functions.

**1984–1988 Avantek/Hewlett Packard, Manager, Employee Development, College Relations and Communications.** Developed the department from scratch. Responsible for training and development, technical training, college relations and communications for the entire company, covering five cities and 3200 employees.

**1980 – 1984 Bell Laboratories, New Jersey**

- \* Provided internal audits across Vice Presidential regions for Affirmative Action/EEO
- Responsible for campus-wide outreach programs for recruitment efforts
- Providing Race Relations and Diversity Awareness Training
- Human Resources personnel recruitment.

**1975 – 1980 Rutgers University, Rutgers College Student Counselor and Academic Advisor. Advising and counseling undergraduate students. Advisor to Latino Students Special Interest Group.**

**Education**

**1983 Rutgers University, New Jersey**

Doctor of Education, Counseling Psychology

**1977 Rutgers University, New Jersey**

Masters of Arts, Major: Psychology

**1974 Douglass College, New Jersey**

Bachelors of Arts, Spanish Literature and Education -Teacher Credential K-12 and ESL (English As A Second Language)  
Graduated Honors

**Publication & Teaching**

**Coauthor to Anthology: The Diversity Calling: Building Community One Story at a Time Published 2011/Xlibris.**

[www.ahrmm.org](http://www.ahrmm.org) Co-authored article: Beyond Survival of the Fittest in Association for Hospital Resource & Materials Management, Supply Chain Strategies and Solutions Jan/Feb 2014 edition.

**Faculty at Summer Institute for Intercultural Communication (SIIC)**

**Certified in Cross Cultural Navigator (TMC/Berlitz 2011)**

**Past & Current Memberships**

American Psychological Association  
National Association - American Society for Training and Development  
Bay Area Organization Development Association  
Diversity 2020  
Latina Coalition  
Diversity 2020

# Crystal L. Simon

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484 Lake Park Avenue #331, Oakland, CA 94610

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## SUMMARY

- ❖ Energetic strategist with over fifteen years of experience transforming government, corporate, and non-profit agencies to maximize effectiveness
  - ❖ Strong leader with excellent strategic and systems thinking skills who has overseen multiple organizational redesign, governance, and strategic planning projects
  - ❖ Skilled executive coach with strong ability to guide individuals and teams in setting and achieving performance goals
  - ❖ Effective communicator with exceptional interpersonal, negotiation, and influencing skills
  - ❖ Multi-disciplinary professional adept in building and maintaining relationships with a range of leaders in complex political environments
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## HIGHLIGHTS OF PROFESSIONAL CONSULTING EXPERIENCE

### CS Consulting

2005 - Present

#### Principal and Founder

Oakland, CA

- Sole proprietor of a consultancy providing custom-designed services, including: organizational analysis, strategic planning, change management leadership, project management, organizational and governance design, strategic communications, and executive coaching
- Selected clients include: Abode Services, Blue Shield of California, City of Oakland, Draper University, General Electric, National Equity Project, Oakland Unified School District, Single Stop USA

#### Sample Client Projects:

##### *Role: Lead Consultant/Project Director – Blue Shield of California*

- Conducted an organization assessment and architected a comprehensive change management strategy to guide \$50 million health care business transformation project
- Developed change management methodology and tools to introduce significant business process and technology changes to 15 business units
- Coached executives in effective operational practices, including process efficiency, governance, human capital planning, change management, organizational realignment, and leadership

##### *Role: Lead Consultant/Change Advisor – Blue Shield of California*

- Designed and implemented team effectiveness, organizational development, and stakeholder engagement strategies for a \$400 million health care IT business transformation project
- Coached executives and managers in effective operational practices, including process efficiency, human capital planning, governance, change management, and organizational realignment
- Architected methodology, developed curriculum and trained over 100 employees on a range of topics, including effective communication, high-leverage stakeholder engagement, sound change management practices, and high-leverage organizational realignment strategies

*Role: Project Director – Oakland Unified School District*

- Designed and facilitated strategic planning and leadership training workshops for executive team
- Provided counsel to executive management team including coaching, program planning support, and effective management practices resulting in increased cohesion and productivity of team
- Led agency-wide strategic planning and communication process involving more than 400 staff, customers, and stakeholders
- Conducted planning, undertook best-practice research, developed program blueprints, and launched implementation of organizational redesign projects to enhance the quality and scope of key programs

*Role: Organization Effectiveness Consultant –Oakland Unified School District*

- Redesigned a business unit, including strategic restructuring, determining staffing levels, and recommending staffing allocations
- Conducted research and interviews to analyze existing staffing patterns and positions within a business unit
- Drafted and scored over 50 position descriptions, ensuring alignment within position groupings and across agency departments
- Provided thought partnership to agency leaders, guiding them in effective staffing patterns

*Role: Senior Consultant – General Electric*

- Designed and developed custom training materials for global business coaching workshops
- Facilitated workshops to train 180+ business executives and leaders in coaching and communication skills
- Provide strategic thought partnership to senior business leaders and executives, contributing to development of global project implementation strategies for high profile business redesign initiative

**PSComm, LLC**

**2002 - 2004**

**Associate**

**London, England**

- Represented an American management consulting firm as the only full-time UK-based employee on a high-profile multi-million dollar transport policing project
- Architected and project managed a comprehensive change management program to transition 3,000 staff to a newly formed organization, including training, coaching, communication strategies, and staff engagement
- Designed and managed an organizational change program affecting over 350 staff that resulted in increased employee morale and departmental efficiency
- Conducted organizational analysis for a large public sector agency, recommending strategic and operational modifications that resulted in improved community relations and employee productivity
- Developed a new department, including recruiting, interviewing and hiring over 100 directors, managers and operational staff

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**OTHER PROFESSIONAL EXPERIENCE**

**Executive Office of the Mayor**

**2004 - 2005**

**Government of the District of Columbia**

**Washington, DC**

**Special Assistant to the Deputy Mayor for Children, Youth, Families & Elders / Education Initiatives Manager**

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Council Appointed Employees Evaluation Process

- Directed communications for education and human service projects, including writing and delivering speeches, conducting interviews and briefings with press, and hosting large scale public events
- Conducted communications trainings to build the capacity of local and national literacy organizations
- Managed a \$2 million communication budget and the corresponding communications campaign, including writing elevator speeches, public correspondence, radio ad content, television ad content, and web page content
- Provided strategic and operational guidance for Mayor and key officials about education and social service programming that enhanced resource utilization and increased service levels for city residents

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**EDUCATION**

**Master of Arts in English Literature** **2002**  
**University of Sussex** **Brighton, England**

**Bachelor of Arts in English Literature** **2000**  
**Washington University** **St. Louis, MO**

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**CERTIFICATIONS**

**Leadership Certificate** **2010**  
**Coaches Training Institute** **San Rafael, CA**  
 Core concentrations: executive development, leadership development, and group facilitation

**Co-Active Coaching Certificate** **2008**  
**Coaches Training Institute** **San Rafael, CA**  
 Core concentrations: interpersonal communication, inquiry and improvement processes, and team building