

Lake County

RFP Number: 25158

-ILLINOIS -



Carter
Development
Group

INSIGHT & INCLUSIVE STRATEGIES

April 14, 2024



Krista Kennedy
18 N County Street
9th Floor
Waukegan, IL 60085

Attention Krista Kennedy:

The Carter Development Group (CDG) is pleased to submit our proposal in response to the **RFP Number: 25158**. Thank you for committing to advancing psychologically safe and emotional intelligent initiatives throughout Lake County. Our firm has extensive experience leading comprehensive research, strategic planning, and change management processes for inclusive community building practices.

We look forward to serving as your organizational development Consultant for this important and relevant project beginning February 2025.

With Gratitude,

A handwritten signature in black ink, appearing to read 'Adrian'.

Adrian N. Carter, Ph.D.
CEO & Founder
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Executive Summary

When counties, city municipalities, and government agencies desire strategically inclined, solution-focused, and human-centered expertise in organizational development, psychological safety, emotional intelligence, and employee engagement, the Carter Development Group, LLC (CDG) has proven its reputation and ability to deliver. CDG is coming off a historic accomplishment as the first firm to conduct a harm study for Black Americans connected to reparations for county and municipal entities. The City of Asheville and Buncombe County, NC, was the second city and first county in the United States of America to pass resolutions supporting reparations for Black American residents. CDG's racial audit and strategic plan across city and county government departments and services for the Asheville-Buncombe County project resulted in a groundbreaking research methodology and more than 100 recommendations.

Lake County has embarked on a journey to embed psychological safety, emotional intelligence, and belonging principles into its operational fabric. Recognizing the foundational values of psychological safety, emotional intelligence, and belonging, the County seeks to establish a clear mission, vision, and goals to align its initiatives strategically while reflecting the community's needs and aspirations. Our understanding of this project is informed by our deep expertise in organizational transformation, strategic planning, and the successful implementation of psychological safety, emotional intelligence, and belonging frameworks for government entities, municipalities, and organizations.

CDG is committed to partnering with Lake County to ensure the development of an employment engagement plan that embraces its entire 2,500-employee workforce. Recognizing the breadth of services provided by Lake County—from public safety to healthcare, stormwater management to judicial services—CDG will utilize its proven methodologies to craft a customized and inclusive employee engagement framework tailored to the unique operational and cultural dynamics of the County.

Our track record includes transformative projects such as equity audits, psychological safety, emotional intelligence, and belonging strategy development, and change management for organizations like the City of Asheville and Buncombe County, the University of Washington, and Broward County, FL. By leveraging proven methodologies like The Ellison Model® and tools such as the Racial Equity Harm Assessment Compass®, we are equipped to guide Lake County through this critical transformation. The following proposal will outline our strategic planning approach to advance equity in Lake County.

Company Background

Founded in 2011, the Carter Development Group is a research, consulting, and leadership development firm for county and city governments, government agencies, educational institutions, non-profit organizations, and corporations. CDG specializes in strategic planning, change management, employee engagement, conflict resolution services, executive coaching, human capital training, human resource management solutions, and strategic and creative communication.

CDG is a federal 8(a) certified firm that holds state and city Minority Business Enterprise (MBE) and Disadvantaged Business Enterprise (DBE) certifications.

Summary of Qualifications

The Carter Development Group is a privately held firm headquartered in Fort Lauderdale, FL. We have 13 years of experience researching and consulting on psychological safety, emotional intelligence, and belonging, compiling quantitative and qualitative data, conducting analysis, developing presentations and reports with findings and recommendations, and leading change management strategies for organizational transformation within the public sector.

CDG is an experienced consulting team with strong organizational development, leadership, and capacity-building experience. It also has a demonstrated strong track record of planning, implementing, and completing psychological safety, emotional intelligence, and belonging consulting projects. CDG comprises 15 associates who are experts in strategic planning. Our associates hold doctoral and master's degrees and certifications in public administration, social change, sociology, leadership, research, and professional development education. We are adept in conducting research to understand your organizational needs, uncovering trends of inequities, developing criteria, benchmarks, and metrics to track growth, developing a strategic plan of action, hosting facilitative dialogues, leading professional development training, developing curriculum across a range of employee engagement topics, and executive coaching. We have worked with all workforce levels, including direct service staff, mid-management, and executive employees. Additionally, CDG uniquely incorporates a branding and strategic communications approach with its clients to ensure a clear and inclusive brand messaging for the organization.

In addition to the City of Asheville and Buncombe County, NC, our psychological safety, emotional intelligence, and belonging research and consulting clients have included the Town of Brookline, MA, California Department of Child Support Services, University of Washington, Maine's Department of Corrections Juvenile Justice Advisory Group, and Broward County Public School District. CDG has served more than 50 public sector clients throughout the United States and internationally.

Carter Development Group Company Profile

- Corporate Headquarters: Fort Lauderdale, FL
- Years in Business: 13
- Public Sector Years of Service: 13
- Decision-making Body: Dr. Adrian N. Carter, Ph.D. Founder, Firm Managing Partner/Owner

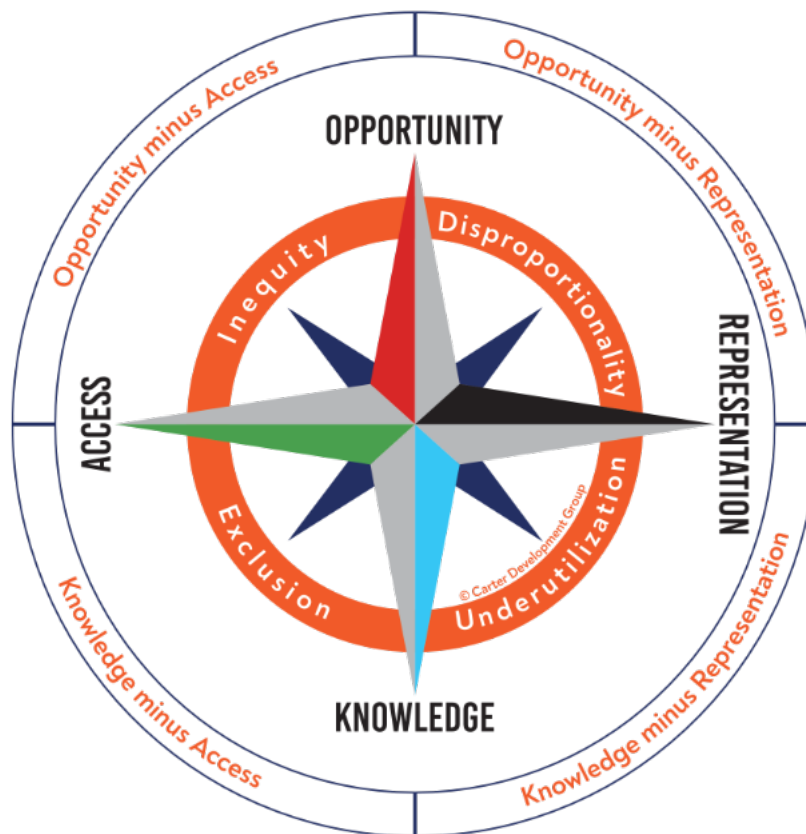
Philosophy & Methodology

The Carter Development Group uses several research-based, transformative philosophies and methodologies to ensure a character-enriched, human-centered approach to psychological safety, emotional intelligence, and belonging strategic planning and implementation. These include the CDG Racial Equity Harm Assessment Compass®, the Government Alliance on Race and Equity (GARE), The Ellison Model™ (TEM), and the 2030 United Nations Sustainable Goals.

O.K.R.A. RACIAL EQUITY HARM ASSESSMENT COMPASS®

The O.K.R.A. Racial Equity Harm Assessment Compass® was developed by the Carter Development Group as a framework/lens to assess the policies, procedures, outcomes, and overall impact of government, educational, corporate, or business services on its workforce, residents, stakeholders, or customers. The lens examines the opportunities, knowledge, representation, and access of government services to identify factors creating disproportionality, underutilization, exclusion, or inequity within government services. Our signature harm assessment compass is the springboard to co-create a lens that examines policies, programs, and operations to ensure psychological safety, emotional intelligence, and belonging for all County staff, stakeholders, and patrons.

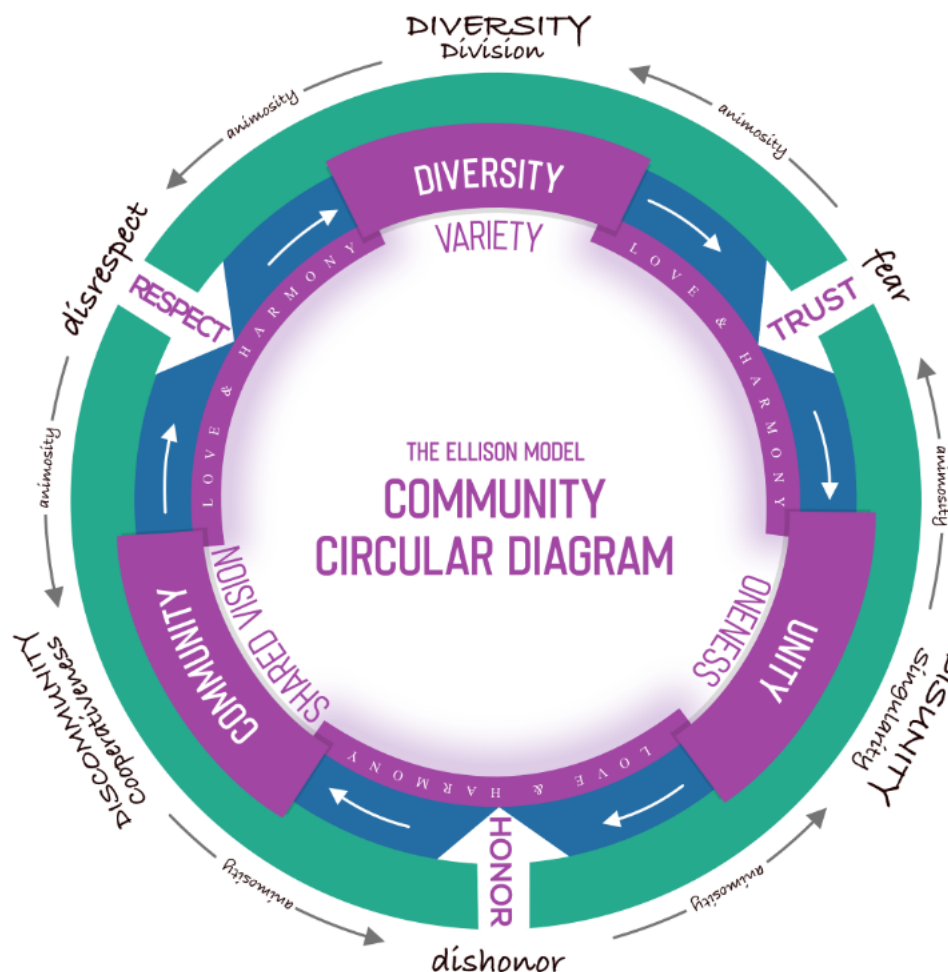
O.K.R.A. RACIAL EQUITY HARM ASSESSMENT COMPASS®



THE ELLISON MODEL™

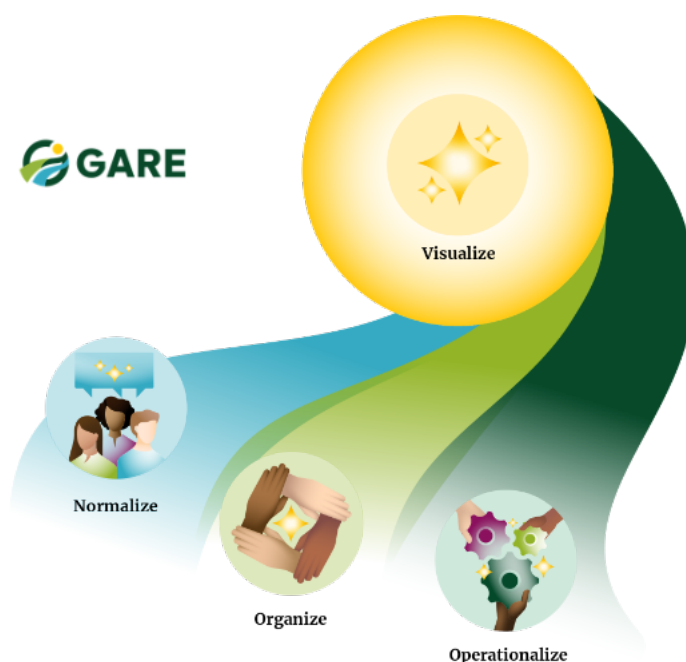
The Ellison Model™ (TEM) is a methodology and a philosophical approach for organizational and human capital development. As a philosophical approach, The Ellison Model is rooted in character development techniques for building sustainable relationships and balancing the power dynamics within relationships (i.e. supervisors and employees). As a methodology, TEM is an inclusive leadership toolkit for personal, professional, and organizational development. The toolkit includes rubrics and strategies for assessment, strategic planning, change management, evaluation, modification, and professional development. TEM is a comprehensive dispute system design comprised of numerous instruments that help individuals and organizations achieve building an inclusive community building.

The Community Circular Diagram is an Ellison Model assessment and professional development tool that observes organizational behavior in three categories: 1) the outer circle of discommunity (marginalization and scarcity), 2) the character development ring, and 3) the inner circle of inclusive community building. Our proprietary assessment determines the level of discommunity occurring within an organization. Using the data gathered, CDG identifies opportunities for professional character development training to produce a more cohesive, productive, and inclusive workforce. Lastly, CDG identifies programmatic and policy changes for long-term success that perpetually moves the organization from diversity, to unity, to community.



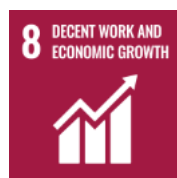
GOVERNMENT ALLIANCE ON RACE AND EQUITY (GARE)

CDG uses GARE's equity tools and framework to conduct assessments for government agencies. This may involve evaluating policies, programs, or practices to identify racial disparities and develop strategies for improvement. Our team works with our clients to create comprehensive action plans based on GARE's assessments and to outline specific goals, strategies, and timelines for addressing racial disparities and promoting equity. We also provide capacity building training to engage in conversations about race, racism, and equity.



2030 UNITED NATIONS SUSTAINABLE GOALS

The Carter Development Group has adopted the 2030 United Nations Sustainable Goals as part of our philosophical underpinning. Our firm understands the role of psychological safety, emotional intelligence, and belonging in the global community. The interconnectedness of our planet means that human beings are constantly communicating and interacting across borders, which means that our work can spark the person who sparks a revolution of inclusive community building. The work of the Carter Development Group engages six of the 2030 United Nations Sustainable Goals. The Sustainable Development Goals are an urgent call for action by all countries - developed and developing - in a global partnership that recognizes that ending poverty and other deprivations must go hand-in-hand with strategies that improve health and education, reduce inequality, and spur economic growth.



Past Experience

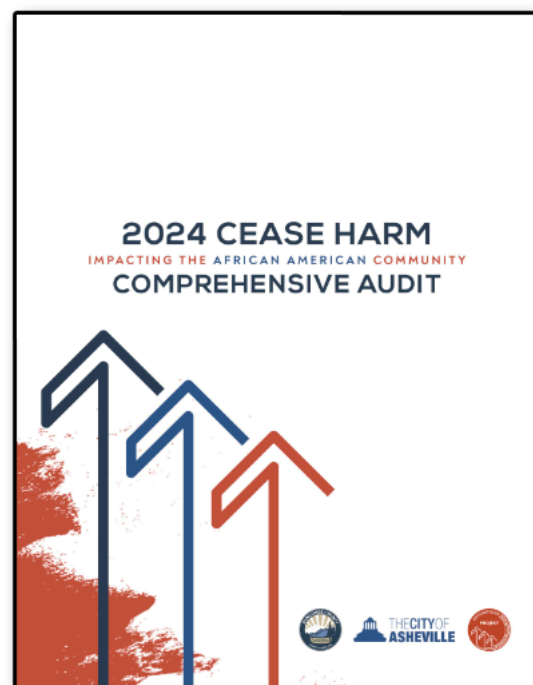
Carter Development Group (CDG) has extensive experience in developing and implementing psychological safety, emotional intelligence, and belonging assessments and climate surveys. CDG has led several comprehensive employee engagement audits for government agencies, such as Buncombe County and the City of Asheville, NC, where it conducted audits across over 60 city and county departments. The assessments involved both quantitative and qualitative data collection methods, including surveys and interviews, to identify gaps in knowledge, opportunities, representation, and access. CDG has also applied frameworks like the O.K.R.A. Racial Equity Harm Assessment Compass® and the Government Alliance on Race and Equity (GARE) tools to evaluate policies, programs, and practices, ensuring the systematic identification of racial disparities and promoting equity. Additionally, CDG has developed strategic plans based on their findings, ensuring long-term employee engagement success.

BUNCOMBE COUNTY & CITY OF ASHEVILLE, NC

Buncombe County and the City of Asheville, NC, made history as the first county and second city in the United States of America to pass resolutions supporting reparations for Black Americans. To support this historic feat, the county and city sought the expertise of qualified subject matter experts to conduct a comprehensive audit and corresponding strategic plan to address ongoing harms caused by city and government services, policies, practices, and procedures. The audit encompassed county and city governments' internal and external programs across 31 County departments and 32 City departments, including law enforcement and emergency services, economic development, education, health and wellness, housing, human resources, and equity and legal offices. The audit provided an independent assessment using the O.K.R.A. Compass™ and engaged stakeholders through surveys and interviews. It culminated in a strategic plan for harm reduction. (Project Timeline: Aug 2023 - April 2024)

Project Objectives

- Apply various methodologies and levels of analysis to conduct an objective and systematic examination of evidence through a comprehensive performance audit.
- Develop communication cadence with the City and County government, the Reparations Project Manager, and the Community Reparations Commission.
- Conduct a comprehensive performance audit of seven Impact Focus Areas (IFA): criminal justice (policing and emergency services), economic development, education, health and wellness (including recreation services and transportation), housing, internal workforce, and equity and legal offices.
- Confirm compliance with federal and state laws, regulatory bodies, codes of conduct, court orders, and consent decrees while verifying publicly disclosed facts and data related to harm cessation.
- Summarize findings, conclusions, and recommendations in a final strategic plan.



Strategy

- **Project planning meetings:** The meeting commenced with an overview of the project objectives, timeline, and approach. The meetings outlined the approach to data collection, analysis, preliminary presentation of the findings, project meeting cadence, and project update to the Community Reparations Commission and the City and County commissioners and managers. The meeting also outlined strategies for summarizing the final strategic plan findings, conclusions, and recommendations.
- **Kick-off meeting:** An in-person project kick-off meeting was held to present the project timeline and approach to the Community Reparations Commission.
- **Communication plan:** The communication plan for this joint initiative involved establishing a structured communication cadence with City and County department heads to learn about their programs, policies, procedures, and intended outcomes in their service delivery. The communication plan utilized in-person, virtual, and digital updates to share key findings, seek input, and ensure a collaborative and transparent process for the joint city and county project management team and the Community Reparations Commission.
- **Data collection:** A data collection matrix requesting information on governing policies, ordinances, resolutions, funding, grant applications, awards, and evaluations was developed across the seven impact focus areas of Criminal Justice and Emergency Services, Economic Development, Education, Health & Wellness, Housing, Human Resources, Equity & Inclusion Offices, and Legal departments. The data was specific to each impact area. The economic development data request included a review of the City's and County's procurement process. The education data request included reviewing grant programs for early childhood programs. The criminal justice data request examined the frequency of arrest by demographics, referrals to diversion programs, police training for bias, and the average emergency response time per location throughout the city.
- **Cohort meetings:** Data review/cohort meetings were held with department heads and staff to further discuss department practices, policies, and expected outcomes.
- **Data analysis:** The data analysis within the impact focus areas involved systematically applying proposed methodologies to examine data artifacts gathered during the comprehensive performance audit. The subject matter experts utilized analytical techniques to evaluate the data to derive meaningful insights and identify patterns that will inform the final strategic plan.
- **Law Enforcement and Emergency Services:** CDG reviewed over 150 artifacts from the Asheville Police Department and Buncombe County Sheriff's Office to identify disproportionality, underutilization, exclusion, and inequity within their personnel demographics, recruitment practices, field training procedures, traffic stops and searches, and arrests and bookings. We also evaluated the agencies' community engagement programs, partnerships, access to alternative sentencing programs, and juvenile justice services. Our findings highlighted several areas of harm, including the overrepresentation of Black residents in traffic stops and searches, racial and ethnic disparities among Black youth in the juvenile justice system, and low representation of Black law enforcement personnel in certain departments. Our study produced 13 strategic recommendations to improve law enforcement practices.

- **Economic Development:** CDG reviewed over 500 artifacts from the economic development departments of the City of Asheville and Buncombe County governments to identify disproportionality, underutilization, exclusion, and inequity within procurement and contracting, access to capital, non-profit and grant support, and workforce development policies, procedures, and practices. Our findings revealed several areas of harm, including inadequate marketing of opportunities for accessing capital, significant underutilization of minority vendors, and insufficient provision of workforce development opportunities. Our study resulted in 34 strategic recommendations to enhance economic development practices.
- **Education:** CDG reviewed over 140 artifacts of the early childhood and closing the opportunity and achievement gap initiatives from the City of Asheville and Buncombe County governments to identify disproportionality, underutilization, exclusion, and inequity within grant funding, programmatic effectiveness, and school district partnerships. Our findings revealed several areas of harm, specifically inadequate data collection of grant recipient program effectiveness in tracking educational milestones and community impact. Our study resulted in 8 strategic recommendations to enhance the grant funding practices for educational initiatives.
- **Health & Wellness:** CDG reviewed 75 artifacts from Buncombe County Public Health Department to identify disproportionality, underutilization, exclusion, and inequity within access to healthcare services, health education and literacy initiatives, and food access and security. CDG also assessed the health-related programming of the City and County parks and recreation services. Our findings revealed some harm in the areas of access to healthcare services and access to parks and recreation programming. Our study resulted in 14 strategic recommendations to enhance health and wellness practices.
- **Housing:** CDG reviewed 50 artifacts to identify disproportionality, underutilization, exclusion, and inequity within the City of Asheville and Buncombe County governments' affordable housing policies, procedures, and practices. CDG assessed the housing market dynamics, access and support to homeowners and renters, and regulatory compliance. Our findings revealed several areas of harm, including an annual median income requirement that greatly exceeded the annual income of Black residents, a scarcity of affordable housing availability for renters and buyers impacted by homeowners who are seasonal residents, and the potential for zoning laws and code enforcement practices that may have a racial bias. Our study resulted in 15 strategic recommendations to enhance affordable housing practices.
- **Internal Workforce/Human Resources:** CDG reviewed numerous artifacts to identify any disproportionality, underutilization, exclusion, or inequity within the City of Asheville and Buncombe County governments' internal workforce policies, procedures, and practices. CDG assessed the workforce diversity metrics, recruitment, onboarding, employee development and advancement processes, and

the engagement, satisfaction, and exit surveys. Our findings revealed a need to redesign the interview process within both governments to mitigate bias, enhance data-driven practices by collecting key workforce data to identify trends before personnel issues grew more severe, and the need to begin conducting employee engagement surveys. Our study resulted in 13 strategic recommendations to enhance human resource practices.

- **Equity, Inclusion, & Human Rights:** CDG reviewed numerous artifacts within Buncombe County's Equity and Human Rights Office and the City of Asheville's Equity and Inclusion Office to identify any disproportionality, underutilization, exclusion, or inequity. CDG assessed diversity and inclusion policies and procedures, the impact of equity and inclusion initiatives, professional development opportunities, and employee equity engagement data-driven practices. Our findings revealed a need to provide wide-scale racial equity training across the organizations, a completed comprehensive racial equity plan for the City, and the importance of conducting an organizational policy review with an equity lens. Our racial equity study resulted in 9 strategic recommendations to enhance equity, inclusion, and human rights practices.
- **Comparative study:** CDG performed a comparative study for each impact focus area to examine the policies, practices, and trends across similar cities and counties.
- **Preliminary presentation:** CDG developed a harm assessment scale to benchmark findings and outcomes as a systematic and consistent framework. The findings and harm assessment scale values were shared with City, County, and the Community Reparations Commission senior leaders in a preliminary presentation to steer their consideration toward solutions and strategies.

Results

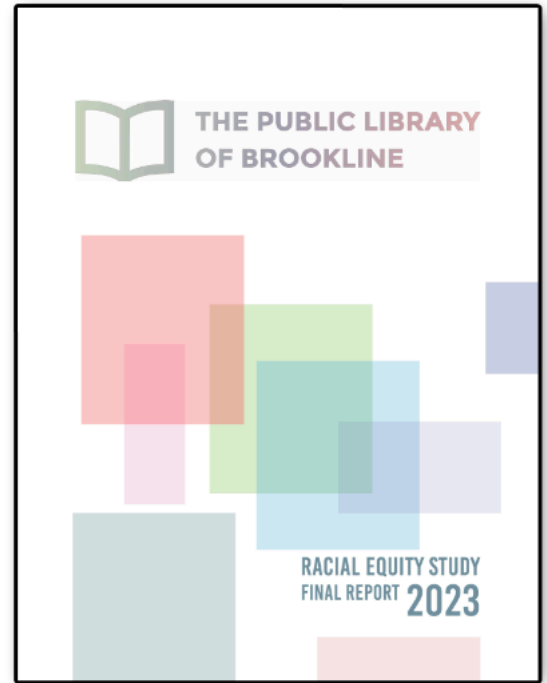
CDG developed a final report containing a strategic plan and 108 recommendations to reduce harm in City and County services across criminal justice (law enforcement and emergency services), economic development, education, health and wellness (including recreation services and transportation), housing, internal workforce, and equity and legal offices.

PUBLIC LIBRARY OF BROOKLINE (BROOKLINE, MA)

In collaboration with library governing Boards, the Town of Brookline desired a consultant to conduct comprehensive reviews of all Library Departments and Boards. They aimed to identify systemic impediments to racial equity, ensuring compliance with state and federal laws while assessing the culture of equity and inclusion within the library. The Carter Development Group (CDG) was selected as the consulting firm for the project, entrusted with delivering a comprehensive study and strategic plan encompassing best practices, multi-year equity goals, specific indicators, initiatives, and resource requirements for implementation. CDG's expertise was pivotal in conducting community engagement, facilitating capacity-building training, and fostering collaboration with underrepresented groups. (Project Timeline: Feb 2022 - July 2023)

Project Objectives

- Research municipal and Library best management practices for diversity and equity.
- Assess leadership commitment and accountability for psychological safety, emotional intelligence, and belonging.
- Create a baseline research of employee and community attitudes.
- Examine compliance reports and collect additional data.
- Lead reviews with Library staff and Board of Trustees.
- Develop a short list of priorities expressed as SMART goals.
- Outline systems/processes for data collection and monitoring.
- Specify staff, skills, and financial resources required.
- Produce a Library-wide summary of racial equity objectives.
- Provide a cumulative impact and synergy assessment.



Strategy

- **Project planning meeting:** Met with the town manager, human resource director, and library director to outline the project goals, work plan, timeline, and travel dates. CDG acquired a greater understanding of the organizational challenges confronting the Public Library of Brookline and its desire for equity and inclusion.
- **Communication plan:** Developed a communication plan to introduce the project, encourage participation throughout each research phase, and provide updates.
- **Site visit:** Hosted in-person focus groups with library staff, managers, and senior leaders at its three locations to gain insight into department responsibilities, experiences with patrons and fellow staff members, and their expectations for psychological safety, emotional intelligence, and belonging amongst Black Indigenous People of Color (BIPOC), LGBTQIA+ staff, and Black men.
- **Governance board capacity training:** The Board of Trustees, Foundation Board, and Friends of the Library desired to increase the belonging of their membership. CDG engaged them with strategic planning workshops on mentorship, allyship, and relationship building with diverse community organizations.
- **Engagement survey:** Two engagement surveys were distributed as part of a two-week survey campaign: 1) a 40-question survey to the 94 library staff and 2) a 33-question survey to the Board of Trustees, Foundation Board, and Friends of the Library membership. Each survey was designed to assess the knowledge and skill gaps related to psychological safety, emotional intelligence, and belonging among the library employees and governance board members. It sought to gauge awareness, perception, and staff experiences within the organizational culture, in addition to evaluating the organizational readiness for change. The surveys also collected demographic information from the participants. Upon completion of the survey, the data was disaggregated and cross-tabulated across historically marginalized groups, including

women, Black Indigenous People of Color (BIPOC), LGBTQIA+, and people with disabilities.

- **Best practices study:** Our firm worked with the American Library Association to distribute a national best practices and comparative assessment for racial equity initiatives in libraries. CDG conducted interviews lasting 30-60 minutes with library directors and organizations to gain insights into their successful psychological safety, emotional intelligence, and belonging programs and the challenges they were currently facing.
- **Community partnership research:** CDG generated a list of surrounding community organizations that serviced diverse populations and historically underrepresented groups to learn more about their interest in collaborating with the library and creating a pipeline of various patrons and employees.
- **Focus groups:** CDG hosted seven focus groups across departments and satellite sites.
- **ERG development:** CDG facilitated workshops to form and develop the library's employee resource group, later named the Advocacy Council. Training topics included organizational structure, charter development, business practices and purpose, and goals for inclusive community building.
- **Professional development roadmap:** Using the quantitative and qualitative data, we developed a professional development education roadmap to address gaps in knowledge and practice. Our recommendations included training on implicit and explicit bias, earned and unearned privileges, and strategic partnership development.
- **Strategic Plan:** Developed an employment engagement plan using our proprietary SMART/GOMA/BEST strategic planning tool that highlighted 45 recommendations categorized as institutional support, education and training, recruitment and retention, values and climate, supplier diversity, and policy, procedure, and communications.
- **Implementation strategies:** Developed a change management strategy to guide the strategic plan review and generate implementation steps.

Results

CDG developed a final strategic planning report containing 31 recommendations, a best practice report that resulted in 50 best practices across 12 organizations, and a listing of 21 community organizations servicing diverse populations. Our work has resulted in more opportunities for community partnerships, human resource revisions, developing an employee resource group, and ongoing capacity-building training for the governing bodies. The quantitative and qualitative research methods resulted in a **91% and 83% participation rate** among staff and board members. Our recommendations utilized our signature SMART/GOMA/BEST strategic planning tool to outline initiatives for employee recruitment, management, engagement, and educational practices. The library continues to develop community partnerships with churches and local civic organizations. Board members have also adopted the approach of diversifying its membership through community partnerships.

UNIVERSITY OF WASHINGTON FACILITIES (SEATTLE, WA)

UW Facilities (UWF), a department within the University of Washington, oversees the management of buildings, infrastructure, and land across the Seattle, Bothell, and Tacoma campuses. UWF established the Workforce Equity Group (WEG) to cultivate a safe and inclusive work environment across its diverse workforce. To assist the WEG and other departments, UW Facilities desired a subject matter expert to

assess and guide the implementation of initiatives for their 1100 employees across 25 units.

The Carter Development Group conducted a full site assessment to understand the workforce's sense of belonging, identify pain points within the organizational culture, and design and implement a comprehensive program to improve employee engagement and cultural awareness. This included metrics to monitor progress. We were asked to assess their Human Resource management (recruitment, onboarding, retention, and promotion) practices. (Project Timeline: June 2022 - July 2023)

Project Objectives

- Assess current policies, practices, and organizational culture.
- Recommend changes in organizational policies, procedures, and practices.
- Provide recommendations for designing inclusive experiences within the organization.
- Develop mechanisms for tracking the effectiveness of recommended changes.
- Develop an associated roadmap aligned with the UW strategic plan that includes long-term monitoring and evaluation methods.



Strategy

- **Project planning meeting:** CDG met with executive and senior leaders, the UWF project team, and the employee resource group to outline the project goals, work plan, timeline, and travel dates. CDG also provided regular updates to the UWF Equity & Inclusion Strategic Goal Working Group.
- **Communication Plan:** Created a communication plan to introduce the project, encourage participation in each research phase, provide updates, and highlight project milestones to the UWF staff. Our team developed the communication pieces on behalf of the vice president in the form of a video update. Our team worked with the UW Facilities Communications Department to finalize edits and disseminate the collaterals via email, the organization's newsletter, and the website.
- **Site visit:** Hosted a week-long information session with senior leaders, directors, managers, supervisors, and frontline staff to learn about 1) immediate concerns, 2) roles and responsibilities and their impact on equity and inclusion, and 3) readiness for change.
- **Engagement survey:** Distributed a three-week survey campaign of 45 questions to UWF's 1100 staff members to understand employees' knowledge and skill gaps, perception and experiences of staff within the organizational culture, organizational readiness for change, and demographics. The survey was translated from English to seven languages (Amharic, Mandarin, Korean, Spanish, Tagalog, Tigrinya, and Vietnamese) to ensure representation across the workforce demographic. The survey could be accessed by paper, computer, or mobile devices. Upon completion of the survey, the data was disaggregated and cross-

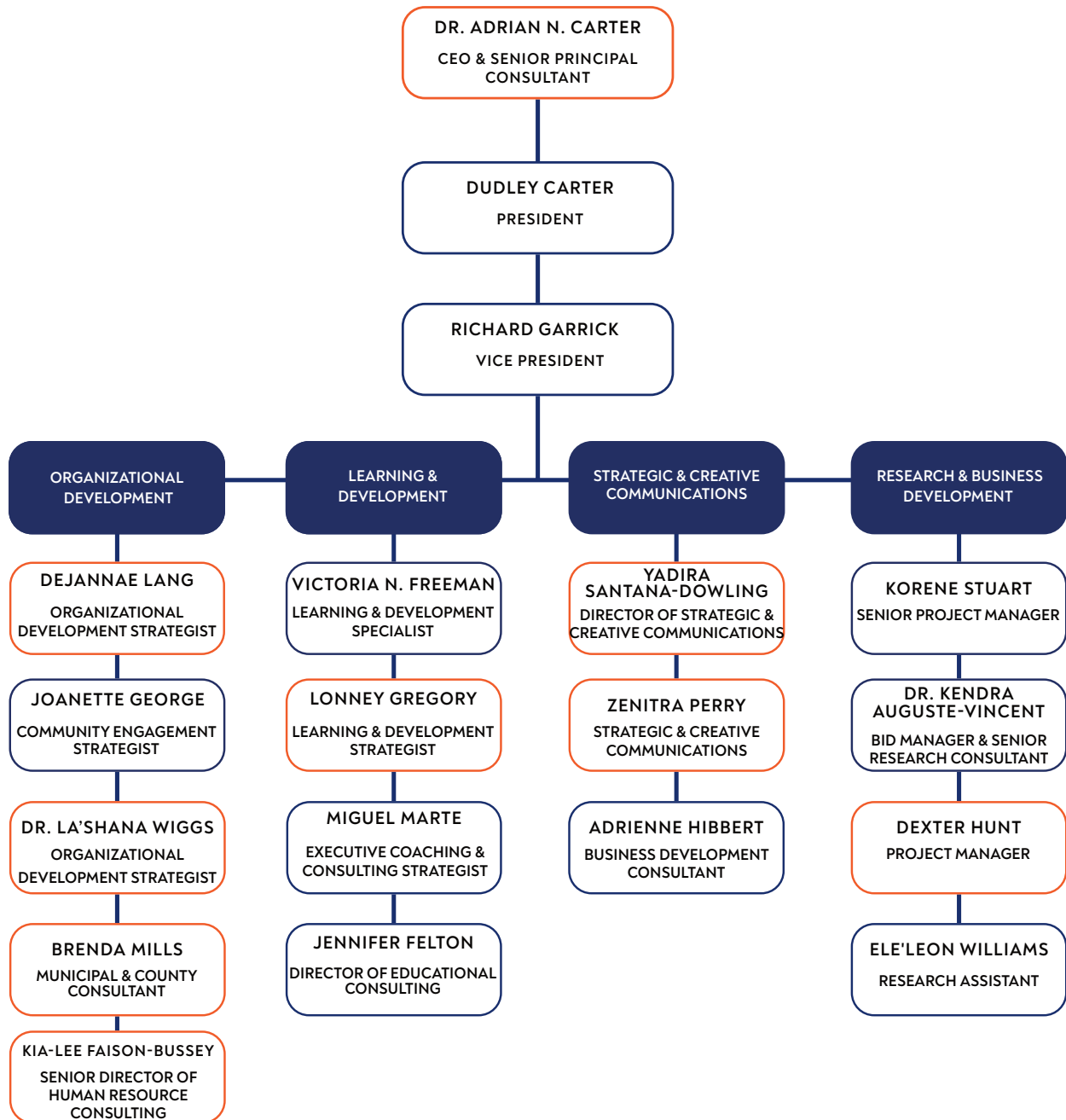
tabulated across historically marginalized groups including women, Black Indigenous People of Color (BIPOC), LGBTQIA+, and people with disabilities.

- **Focus groups:** Hosted ten focus groups with up to 15 participants each. The focus groups were categorized by employee classification (i.e. executive leaders, directors, and managers) and affinity groups (i.e., LGBTQIA+, women, and BIPOC).
- **Individual interviews:** Hosted 20 individual interviews with staff who expressed interest in communicating their specific experiences and perceptions of the organizational culture.
- **Human Resource Analysis:** Conducted a review of the Human Resources recruitment, onboarding, and promotion policies and processes to identify areas of improvement. We also reviewed the grievance and complaint processes to identify trends of inequity within the workforce.
- **Capacity-building training:** Our team engaged the Workforce Equity Group, the employee resource group, in 6-hours of capacity-building training on inclusive community-building strategies for racial equity and strategic planning.
- **ERG development:** Facilitated workshops to guide the Workforce Equity Group (WEG) to strengthen their organizational structure, committee charter, and productivity. In the process, the WEG was rebranded to the Facilities Action for Inclusion & Respect (FAIR) Coalition. The FAIR Coalition is an innovative leadership development and project-based initiative to advance psychological safety, emotional intelligence, and belonging in UW Facilities.
- **Curriculum review:** Reviewed their e-learning curriculum and provided feedback on best practices for adult learning.
- **Professional development roadmap:** Developed a professional development education roadmap to address gaps in knowledge and practice using the data collected from the quantitative and qualitative assessment. Our recommendations included training on psychological safety, business communication strategies, and women in the workforce.
- **Organizational Storytelling and Rebrand Guide:** Our strategic communication consultant developed a storytelling branding guide to shift toward a narrative of inclusion. Recommendations included a vision statement, diversity statement, and marketing activities to engage staff and highlight inclusive activities happening throughout the organization.
- **Strategic Plan:** Developed an employment engagement plan using our proprietary SMART/GOMA/BEST strategic planning tool that highlighted 45 recommendations categorized as institutional support, education and training, recruitment and retention, values and climate, supplier diversity, and policy, procedure, and communications.
- **Implementation strategies:** Developed a change management strategy to guide the strategic plan review and generate the following implementation steps.

Results

CDG developed a final strategic planning report containing 45 recommendations with an associated roadmap aligned with the University of Washington's Diversity Blueprint goals. The final report highlighted well-executed initiatives and identified opportunities for programs needing more development. Our recommendations utilized our signature SMART/GOMA/BEST strategic planning tool to outline initiatives for employee recruitment, management, engagement, and educational practices. Our quantitative and qualitative research methods resulted in a 74% participation rate. UW Facilities has begun the project design phase of its change management plan to prioritize the recommendations. CDG will lead and guide their implementation strategy.

Organizational Chart



Key Professionals

The Carter Development Group is led by Dr. Adrian N. Carter, who possesses a Doctor of Philosophy (Ph.D.) in Conflict Analysis & Resolution, along with 22 years of experience as a consultant, coach, and trainer for government, corporate, non-profits, and educational institutions in psychological safety, emotional intelligence, and belonging. Dr. Carter will serve as the lead project consultant and communication strategist with Lake County.

PRIMARY CONTACT

The project lead, Dr. Carter, and the project manager, Dexter Hunt, will serve as the point of contacts dedicated to addressing issues that may arise during the term of the contract with the County.

KEY PERSONNEL BIOS

Name & Role	Relevant Expertise	Education	Years of Experience	CDG Firm Years
Dr. Adrian N. Carter Project Lead & Principal Consultant	Strategic planning, organizational assessments, conflict resolution, and policy analysis using the OKRA Compass®.	Ph.D. In Conflict Analysis & Resolution	23	13
Lonney Gregory Learning & Development Expert	A seasoned advisor with over 30 years of expertise in organizational training, program development, and change management.	M.S. in Organizational Learning	30	2
Brenda Mills Municipal Equity Consulting Strategist	Skilled in developing Equity Action Plans, fostering community engagement, and advancing equity-focused policies and programs.	Master of Public Affairs	33	2
Dr. La'Shana Wiggs Business Development Consultant	Specializes in human capital strategy, inclusive workplace design, and extensive experience in facilitating equitable hiring practices.	Doctorate of Business Administration	21	2
Kia-lee Faison-Bussey Human Resource Consultant	Certified in HR management, leadership development, process optimization, and innovative and strategic HR solutions.	M.S. In Human Resource Management	22	3
Zenitra Perry Strategic & Creative Communications Consultant	Develops city-wide and brand-specific marketing campaigns, driving engagement and awareness.	B.B.A. in Accounting	21	2
Dejannae Lang, Ph.D.(c) Industrial-Org Psychologist & Trainer	Combines advanced expertise in I/O psychology with consulting to deliver data-driven organizational assessments and employee engagement solutions.	Ph.D. Candidate in Industrial-Organizational Psychology	6	2
Dexter Hunt Project Manager	Focus on cross-departmental collaboration, timeline adherence, and delivering impactful results.	B.S. in Anthropology	21	5

DR. ADRIAN N. CARTER, PH.D., HE/HIM

PROJECT LEAD

Dr. Adrian N. Carter is a distinguished expert with over 23 years of experience in strategic planning, organizational assessment, data-driven research, and professional development training. As the CEO and Founder of the Carter Development Group (CDG), he leads innovative initiatives that integrate organizational change management, conflict resolution, and employment engagement strategies. A certified Ellison Model trainer, Dr. Carter uses his expertise to empower leaders and organizations to cultivate inclusive environments through transformational methodologies like the Inclusive Leadership Framework and Courageous Conversations About Race. Additionally, he is a published author and the creator of the Protracted Identity Conflict Concept and the OKRA Racial Equity Harm Assessment Compass™, methodologies that examine systemic inequities and foster equity-driven cultural transformations.

Key Accomplishments

- Developed the OKRA Racial Equity Harm Assessment Compass™, a proprietary research methodology that identifies systemic inequities and fosters organizational improvements.
- Led over 100 leadership development trainings for various sectors, impacting C-suite executives, educational institutions, and government organizations.
- Authored seminal works on leadership development and conflict resolution, contributing to academia and industry best practices.
- Directed a groundbreaking study for the City of Asheville and Buncombe County, NC, culminating in a historic reparations resolution and over 100 actionable recommendations.
- Successfully facilitated employee engagement programs that integrate adult learning principles, curriculum development, and organizational growth for diverse audiences.
- Collaborated with healthcare, education, and government entities to implement sustainable equity and inclusion practices, improving patient care, employee engagement, and organizational culture.

Core Competencies

- Expertise in guiding organizations through tailored strategic action plans focused on employee engagement objectives.
- Proficient in managing complex conflicts, fostering dialogue, and driving consensus among stakeholders.
- Skilled in designing and delivering comprehensive leadership training programs that align with organizational goals.
- Adept at conducting detailed equity evaluations, leveraging data analytics to identify gaps and propose actionable solutions.
- Renowned for creating inclusive and psychologically safe learning environments that promote introspection and transformative change.
- Strong background in qualitative and quantitative research methodologies, producing actionable insights to support data-driven decisions.

LONNEY GREGORY, HE/HIM

LEARNING & DEVELOPMENT STRATEGIST

Lonney F. Gregory brings over 30 years of expertise as a trusted adviser to learning leaders and corporate officers across private, military, government, and public-sector industries. With a career rooted in applying knowledge to real-world challenges, Mr. Gregory's leadership has spanned roles as an executive, consultant, and trainer. He is renowned for his ability to design and implement systems for organizational change, training program management, and innovation promotion, focusing on experiential learning and practical application. A sought-after speaker and facilitator, Mr. Gregory has delivered keynote seminars at prestigious conferences, including the Black Engineer of the Year Global STEM Competitiveness conference, the Women of Color in Technology conference, and the National Society of Black Engineers national and regional events. Mr. Gregory holds certifications in Meyers Briggs, FIRO-B, InsideOut Coaching, DiSC, and Linkage-certified executive coaching.

Key Accomplishments

- Designed and deployed organizational change models, global training initiatives, and learning technology systems for public and private sectors, including post-9/11 U.S. Intelligence and Department of Defense communities.
- Featured speaker at national conferences and events, promoting diversity, STEM competitiveness, and professional development.
- Led large-scale human capital management initiatives, delivering leadership development programs, promoting diversity and inclusion, and building team capacity through tailored interventions.
- Developed and implemented the iCARE2Cap coaching model, providing targeted support to mid- and senior-level managers across industries.
- Recognized as a U.S. Navy Master Training Specialist and Distinguished Instructor, with expertise in adult learning and curriculum development.

Core Competencies

- Expertise in designing, managing, and evaluating training programs that drive organizational performance.
- Extensive experience coaching professionals across technical, engineering, and managerial roles using evidence-based methodologies and assessment tools.
- Skilled in creating and implementing programs that promote equity, engagement, and systemic change within organizations.
- Focused on integrating organizational design, people, and systems to deliver bespoke, actionable solutions aligned with client goals.
- Developer of contextual tools and interventions tailored to client environments, ensuring actionable outcomes beyond theoretical training.

BRENDA MILLS, SHE/HER

MUNICIPAL EQUITY CONSULTING STRATEGIST

Brenda Mills is an experienced Municipal Equity Consulting Strategist with 33 years of service in public administration and community engagement. A former Equity & Inclusion Director for a North Carolina municipality, Ms. Mills is renowned for her ability to design and implement transformative equity strategies that drive sustainable, inclusive change. She has spearheaded significant initiatives, including the creation of a comprehensive Equity Action Plan and the development of a 24-month Reparations Initiative in collaboration with Buncombe County. Her leadership reflects a deep commitment to fostering equitable communities and empowering historically marginalized groups.

Ms. Mills' career spans multiple roles in municipal government, including Neighborhood & Community Engagement Manager and Economic Development Specialist. Her expertise includes advancing public safety reform, equity-focused budgeting, business inclusion, and public art programming. Recognized with several accolades, including the Dr. Martin Luther King, Jr. Community Service Award, Ms. Mills continues to be an active advocate for equity and community development.

Key Accomplishments

- Revitalized the Equity & Inclusion Department and led the development of the City of Asheville's Equity Action Plan in collaboration with multiple departments, enhancing community impacts.
- Played a central role in initiating and managing a 24-month Reparations Initiative, working with a 25-member commission to produce actionable recommendations for systemic change.
- Strengthened communication with historically African American neighborhoods as Neighborhood & Community Engagement Manager, advancing initiatives such as Reimagining Public Safety and Equity Focused Budgeting.
- Managed the City's Business Inclusion Program, concluded a successful Disparity Study, and oversaw the Public Art Program as Economic Development Specialist.
- Honored with the Dr. Martin Luther King, Jr. Community Service Award for her longstanding commitment to equity and civic engagement.

Core Competencies

- Expertise in designing, implementing, and managing equity-focused initiatives and action plans.
- Skilled in fostering relationships with marginalized communities to ensure inclusive participation in civic initiatives.
- Proven ability to guide complex reparations initiatives, working collaboratively to achieve meaningful outcomes.
- Proficient in managing business inclusion programs, conducting disparity studies, and advancing equity-focused policies.
- Extensive experience in municipal government operations, strategic planning, and budgetary oversight.
- Active in professional and civic organizations, consistently championing equity and community development.

DR. LA'SHANA M. WIGGS, SHE/HER BUSINESS DEVELOPMENT CONSULTANT

Dr. La'Shana M. Wiggs is an accomplished Business and Human Resource Consultant with over 20 years of experience in the financial services industry, including leadership roles at Fortune 100 companies such as Wachovia Corporation, U.S. Bancorp, and Wells Fargo Corporation. Her expertise spans Bank Secrecy Act/Anti-Money Laundering (BSA/AML) Compliance, risk operations, fraud prevention, and both consumer and commercial banking services. Dr. Wiggs specializes in organizational transformation, consent order remediation, and leadership development, leveraging her comprehensive industry knowledge to drive sustainable change within financial institutions. Dr. Wiggs has conducted research in corporate America, Racial Justice perceptions, Charismatic Leadership, Occupational Burnout, and Compassion in the Workplace.

An innovator in financial crimes automation and digitization, Dr. Wiggs has played a pivotal role in resolving technological and process deficiencies to meet regulatory requirements. Her contributions to the field include being named a co-inventor on a U.S. patent for a dynamic interface that digitizes, stores, and verifies critical financial data. Dr. Wiggs is recognized as an industry expert in digital banking practices and financial crimes risk and compliance.

Key Accomplishments

- Directed a multi-year, multi-million-dollar financial crimes automation initiative at Wells Fargo, leading a cross-functional team to enhance operational efficiencies.
- Co-invented a patented dynamic interface for digitizing, storing, and verifying financial data, widely used within the financial services sector.
- Successfully facilitated end-to-end operational improvements across multiple business areas, employing root cause analysis and comprehensive process reviews.
- Supported financial institutions in addressing and remediating regulatory enforcement actions through advanced automation and compliance strategies.
- Championed initiatives to enhance leadership capabilities and organizational culture in alignment with psychological safety, emotional intelligence, and belonging principles.

Core Competencies

- Expertise in identifying and implementing operational improvements to streamline workflows and optimize efficiency.
- Comprehensive knowledge of BSA/AML compliance, fraud prevention, and financial crimes risk management.
- Skilled in leading automation and digitization initiatives to address regulatory requirements and operational gaps.
- Proven ability to mentor and lead cross-functional teams, fostering a culture of collaboration and excellence.
- Adept at managing complex, large-scale projects, ensuring alignment with organizational goals and governance standards.
- Committed to embedding psychological safety, emotional intelligence, and belonging principles into organizational policies, leadership development, and operational strategies.

KIA-LEE FAISON-BUSSEY, SHE/HER HUMAN RESOURCE CONSULTANT

Kia-lee Faison-Bussey is a seasoned Human Resources professional and consultant with over 20 years of experience in HR management, leadership, and operations. Kia-lee specializes in transforming individuals, teams, and organizations by providing strategic and practical HR solutions. Her expertise spans both public and private sectors, enabling her to deliver innovative and results-driven services to a diverse range of clients. With a passion for people development, she focuses on building strong HR foundations to drive organizational growth and success.

Key Accomplishments

- HR initiatives that enhanced employee engagement, reduced turnover, and fostered leadership development.
- Successfully implemented process improvements and systems integration, including the adoption of ADP WorkforceNow to streamline HR operations.
- Led HR functions across multinational organizations, ensuring compliance with US and UK labor laws and implementing global HR best practices.
- Created performance appraisal systems, compensation structures, and strategic action plans that aligned with organizational goals.
- Served in leadership roles for prominent HR organizations, including SHRM and NAAHR, earning recognition for her contributions to the HR profession.

Core Competencies

- Proficient in global HR standards and compliance, holding SPHR, GPHR, and SHRM-SCP credentials.
- Proficient in designing and implementing HR policies, talent acquisition strategies, and employee development programs.
- Skilled in coaching and mentoring leaders to achieve organizational excellence and sustainability.
- Adept at implementing HR technologies and optimizing workflows to improve efficiency.
- Strong capability in fostering a positive workplace culture, managing conflicts, and promoting diversity and inclusion.
- Experienced in delivering tailored HR solutions and training to startups, small businesses, and mid-sized organizations.

DEJANNAE LANG, SHE/HER INDUSTRIAL-ORG PSYCHOLOGIST

Dejannae Lang is a versatile scientist and consultant specializing in Industrial Organizational Psychology. Her multidisciplinary expertise spans the private, public, government, and non-profit sectors, where she delivers impactful employee engagement consulting, research analysis, and workforce training. With a focus on reshaping organizational cultures and improving employee engagement, leadership development, and well-being, Ms. Lang's innovative application of workplace theories and data-driven methods has transformed organizations at every level.

Ms. Lang brings a unique perspective rooted in her service in the United States Air Force and her academic and professional achievements. Her career includes conducting critical organizational training and focus groups with the Department of the Air Force and the U.S. Intelligence Community at the Pentagon. Her consulting clients include state agencies like the Florida Keys Aqueduct Authority, private companies like Workzinga, and non-profits such as the Koyzak Mentor and Minority Foundation.

Key Accomplishments

- Facilitated pivotal organizational conversations and training sessions with the Department of the Air Force and U.S. Intelligence Community, leveraging her military background.
- Developed strategic plans and solutions that integrate workplace theory and scientific methods, driving measurable outcomes for private, public, and non-profit organizations.
- Guided organizational leaders at all levels, including boardrooms and C-suites, to foster inclusive and ethical leadership practices.
- Delivered transformative consulting and training programs, enabling organizations to achieve cultural alignment and improve employee engagement.
- Designed robust organizational plans that incorporate Environmental, Social, and Governance (ESG) factors to align with ethical and sustainable practices.

Core Competencies

- Expertise in applying psychological principles to optimize workplace processes, employee well-being, and organizational performance.
- Data-Driven Methods: Skilled in leveraging analytics and research to inform decisions and evaluate the effectiveness of organizational initiatives.
- Human Resources and Employee Engagement: Experience in reshaping HR practices to enhance engagement, inclusion, and retention across diverse industries.
- Training and Facilitation: Proficient in leading focus groups, workshops, and organizational training sessions tailored to unique organizational needs.
- Cultural Transformation: Adept at aligning organizational culture with strategic goals through leadership coaching, and ESG-focused strategies.

ZENITRA PERRY, SHE/HER

STRATEGIC & CREATIVE COMMUNICATIONS

Zenitra Perry is a dynamic and visionary leader in the fields of strategic communication, branding, and organizational leadership. With a passion for storytelling, equity-centered design, and public engagement, she leverages her extensive background in creative communication to drive transformational change across sectors. Known for her ability to translate complex ideas into compelling narratives, Zenitra has cultivated a reputation as a trusted advisor to senior leaders, government agencies, nonprofits, and grassroots movements.

Her approach integrates culturally relevant messaging, inclusive leadership, and community-based strategies that center the voices of marginalized populations. Whether through campaigns, public messaging, or internal branding initiatives, Zenitra uses creativity as a tool for advancing social equity, fostering belonging, and shaping visionary futures.

Key Accomplishments

- Led the development of award-winning public awareness campaigns focused on health equity, youth empowerment, and civic participation.
- Designed communication frameworks for government employee engagement initiatives that prioritized cultural responsiveness.
- Facilitated workshops and coaching programs to empower emerging leaders with tools for authentic and values-based communication.
- Built engagement strategies that amplified underrepresented voices, especially in historically disenfranchised communities.
- Rebranded several nonprofits and public agencies to reflect evolving missions rooted in social justice and innovation.
- Served as a liaison between public sector institutions and grassroots organizations, creating shared messaging platforms and mutual accountability.

Core Competencies

- Inclusive Leadership & Vision Casting
- Strategic & Creative Communication
- Brand Identity Development
- Public Relations & Community Messaging
- Cultural Competency in Messaging
- Campaign Design & Implementation
- Media Relations & Content Strategy
- Stakeholder Engagement & Facilitation
- Organizational Change Communication
- Equity-Centered Storytelling

DEXTER HUNT, HE/HIM

PROJECT MANAGER

Dexter Hunt is an accomplished Project Manager with over 20 years of experience in project management, business development, and leadership training. He has successfully led strategic planning, professional development initiatives, and marketing communications for diverse industries and international entities. His expertise spans collaborations with government organizations in the Bahamas and Turks and Caicos Islands, non-profit sectors, educational institutions, and the travel, tourism, and hospitality industries. As a former Project Manager at HMS Host, Mr. Hunt excelled in overseeing facilities and ensuring the seamless execution of projects. He is recognized for his ability to manage complex initiatives by developing detailed plans, allocating resources effectively, coordinating with stakeholders, and mitigating risks to achieve timely and budget-conscious results.

Key Accomplishments

- Led training and consultation projects for international government agencies and businesses, driving strategic growth and development.
- Successfully managed large-scale facilities projects within the travel and tourism sector, ensuring operational excellence.
- Performed comprehensive risk analyses to reduce project risks and ensure alignment with timelines and budgets.
- Coordinated with internal teams and external stakeholders to achieve project goals, ensuring feasibility and efficiency.
- Developed and implemented strategic frameworks to monitor progress and deliver high-impact outcomes within scope.

Core Competencies

- Expertise in planning, executing, and overseeing projects to ensure timely and cost-effective completion.
- Skilled in identifying potential risks, implementing mitigation strategies, and optimizing resource allocation.
- Proven ability to lead cross-functional teams and ensure accountability for achieving deliverables.
- Adept at crafting and executing strategic marketing and communications plans to support organizational goals.
- Ensures project deliverables meet the highest standards through rigorous quality checks and process optimization.
- Experienced in fostering partnerships with government entities, non-profits, and private-sector organizations.



DR. ADRIAN N. CARTER, PH.D.

Founder/CEO, Principal Consultant on Equity and Inclusion, Conflict Resolution, & Leadership Development

QUALIFICATIONS

Leadership Development

- Conducted over 300 events as speaker, trainer, host, or event coordinator.
- Designed and implemented conflict resolution, leadership development, and DEI training programs.
- Developed customized workshops and training curricula for various audiences.
- Coordinated and facilitated leadership development retreats, workshops, and special events.
- Conducted student leadership development training for colleges and universities.

Inclusive Community Building Consulting

- Conducted organizational climate assessments for DEI.
- Expert Ellison Model trainer for DEI and certified Courageous Conversations About Race Facilitator.
- Chaired equity committees and developed DEI curriculum integrating Courageous Conversations About Race framework.
- Oversaw school-wide DEI events and engagement.
- Coordinated DEI initiatives, including seminars, workshops, and cultural events.
- Conducted digital equity assessments and DEI cultural sensitivity training.

Conflict Resolution

- Skilled mediator and executive coach.
- Facilitated dialogues, conflict coaching, and executive coaching.
- Conducted organizational assessments and developed strategic plans to address conflict and improve organizational culture.
- Provided conflict resolution seminars and training for corporate, government, and educational institutions.

Organizational Assessment and Strategic Planning

- Conducted strategic planning and organizational assessments for various organizations.
- Managed operational budgets and staff for multiple departments.
- Developed and implemented strategic initiatives to improve organizational effectiveness.
- Coordinated staff training and professional development programs.

ABOUT

Dr. Adrian N. Carter has more than 23 years of progressive experience in strategic planning, organizational assessment, research and data analysis, consultation, and conducting professional development training. He is also a trained and accomplished facilitator, mediator, and executive coach. Dr. Carter, an international keynote speakers, is also a published author on leadership development and conflict resolution.

EDUCATION | CERTIFICATIONS

Doctor of Philosophy

Conflict Analysis & Resolution Studies
Nova Southeastern University | Davie, FL

Master of Education

Leadership in Higher Education
Florida Atlantic University | Miami, FL

Certified Ellison Model Expert

Certified Executive & Conflict Coach

WORK HISTORY

Carter Development Group | 2011-Present

Broward County Public Schools | 2016-2020

Florida International University | 2000-2004, 2016

ICB Productions, Inc | 2005-2011

Broward College | 2004-2015

Membership

Broward County Black Chamber of Commerce

Association of Conflict Resolution (ACR)

International Association for Facilitators (IAF)

Black Professional Network Advisory Board

Florida International University Board of Directors



LONNEY GREGORY, MS

Organizational Training & Development & Strategic Planning

QUALIFICATIONS

Training and Development

- Led the Human Capital Advisory Services division, creating custom interventions in Organizational Development, Performance Management, Change & Transition Management, Employee Engagement, DEIA, and Coaching & Mentoring.
- Developed programs, targeted interventions, and support services; authored and defined a portfolio of 15 practice areas.
- Served government agencies and associations including DoEd, DOT, FTA, FEMA, EXIM Bank, NIH, NVTI, US Navy, AmeriCorps, Peace Corps, and BIG.
- Designed and delivered HR and OD interventions for leadership and management teams.
- Conducted coaching sessions, facilitated strategic planning sessions, and taught numerous courses including the Cook Ross Everyday Bias program.
- Managed course design, delivery, and evaluations; tuition reimbursement; employee resource group leadership, and diversity and inclusion training.
- Designed learning organization, working directly with software engineers, system architects, configuration managers, intelligence analysts and management in identifying training solutions supporting the organization's growing mission, scope, and size.
- Taught analytical tool and methods. Designated member of the Engineering Review Board, testing new technologies and defining analyst end user requirements.
- Organized 70 professionals into 12 functional teams, consisting of curriculum developers, logistics support, marketers and account managers, and web and documentation specialist.
- Delivered workshops on innovation, inclusive leadership, diversity and inclusion, authentic leadership, performance management, and organization culture and dynamics.
- Coached 17 executives vis-à-vis the 360 assessment results from various models (High impact Leadership Model Assessment; Inclusive Leadership Model; Communication Style and Abilities Inventory for Leaders™ (C-SAIL); Thomas-Kilmann Conflict Mode Instrument; and the Hogan Personality Inventory).
- Served as a team leader for the Women in Leadership and the Global Institute for Leadership Development conferences.

ABOUT

Lonney Gregory brings over 30 years of trusted advisory experience to learning leaders and corporate executives across diverse private and public sectors. Specializing in the science of learning and training, Lonney's focus extends beyond what to train, emphasizing how to apply learned concepts effectively. His training-related expertise spans program management, systems engineering, innovation, creativity, and DEIA.

EDUCATION | CERTIFICATIONS

**Master of Science
New Professional Studies (Organizational
Learning)**
George Mason University | 2003

**Bachelor of Science
Business Administration**
Strayer University | 2001

- Certified Diversity Ambassador (CDA), The National Diversity Collaborative, Inc.
- US Navy Veteran, Master Training Specialist (MTS) and Distinguished Instructor
- Crucial Conversations
- Master Facilitator, William Bridges Transition Management
- DiSC; MBTI; FIRO-B; Cook Ross Everyday Bias; CCL Skillscope 360; ELI Civil Treatment, InsideOut Coaching; SLII (Blanchard Situational Leadership)
- SHRM-SCP

HISTORY

Carter Development Group | 2024-Present
Management Concepts | 2021-2024
CareFirst Inc. of Maryland | 2016-2021
Northrop Grumman Corporation | 2004 – 2014



BRENDA MILLS, MPA

Government & Community Engagement Consultant
Equity & Inclusion Expert

QUALIFICATIONS

Inclusive Community Building Consulting

- Over 33 years of experience in public service, specializing in equity, community engagement, and economic development.
- Proven expertise in revitalizing and restructuring equity-focused departments and fostering inclusive and equitable community impacts.
- Skilled in designing comprehensive Equity Action Plans and spearheading municipal reparations processes.
- Conducted organizational climate assessments for DEI.
- Coordinated DEI initiatives, including seminars, workshops, and cultural events.

Community Engagement and Program Development

- Adept at fostering strong connections with historically marginalized communities to promote inclusivity and accessibility.
- Extensive experience in leading community engagement initiatives, including neighborhood revitalization projects and public safety reimagination.
- Recognized for developing programs that enhance communication and collaboration among diverse stakeholders.

Project and Financial Management

- Expertise in managing multi-million-dollar budgets, including oversight of reparations funding and departmental budgets exceeding \$500,000.
- Proficient in coordinating large-scale public initiatives, ensuring compliance with municipal, state, and federal regulations.
- Experience in managing and implementing policies for minority business inclusion, public art, and community development programs.

Awards and Recognitions

- Dr. Martin Luther King, Jr. Community Service Award (2022)
- Asheville Black Excellence Experience Honoree (2023)
- WCU MPA Alumnus of the Year (2023)
- Standing on the Shoulders of Giants Award (2023)
- Order of the Long Leaf Pine (2024)

ABOUT

Brenda Mills is a dedicated equity and inclusion leader with over 33 years of experience in public service, specializing in community engagement, economic development, and cultural preservation. She has successfully revitalized municipal equity initiatives, developed comprehensive Equity Action Plans, and led a groundbreaking 24-month Reparations Initiative in collaboration with a diverse commission.

EDUCATION | CERTIFICATIONS

Master of Public Affairs

Western Carolina University | 2009

Project Management Certification

Western Carolina University | 2010

Bachelor of Science in Industrial Relations

University of North Carolina at Chapel Hill | 1985

Certificates

Government Alliance on Race and Equity (GARE) Advancing Racial Equity (2016, 2019);
Racial Equity Institute (REI) Training, 2022

WORK HISTORY

Carter Development Group | 2024-Present

City of Asheville, NC | 2005-2024

Buncombe County Government, NC | 1998-2005

Professional Associations

- Carolinas Association of Economic Advisory Council
- Buncombe Arts & Cultural Alliance
- Government Alliance on Race and Equity (GARE)
- NC Minority/Women Business Enterprise Coordinators' Network
- Western North Carolina Consortium of Business Support Agencies



DR. LA'SHANA WIGGS, DBA

Business Inclusion & HR Epxert, Compliance Officer

QUALIFICATIONS

Organizational Transformation and Leadership Development

- Over 19 years of leadership experience in the financial services industry with institutions such as Wachovia, U.S. Bancorp, and Wells Fargo Corporation.
- Expertise in Bank Secrecy Act/Anti-Money Laundering (BSA/AML) compliance, fraud prevention, risk management, and leadership development.
- Specialized in organizational transformation, consent order remediation, and creating high-impact leadership strategies.
- Conducted end-to-end process reviews, workflow optimization, and compliance testing to enhance organizational efficiency.

Inclusive Community Building Consulting

- Conducted organizational climate assessments for DEI.
- Coordinated DEI initiatives, including seminars, workshops, and cultural events.
- Conducted digital equity assessments and DEI cultural sensitivity training.

Strategic Consulting and Training

- Developed comprehensive business proposals, pricing structures, and competitive analyses to secure winning client bids.
- Provided training, development, and facilitation services for operational risk and regulatory compliance initiatives.
- Designed workshops and leadership development programs to address burnout, organizational behavior, and effective management tactics.

Innovation and Process Optimization

- Co-inventor of a U.S. patent for a dynamic interface used in digitizing, storing, and verifying data at a leading financial institution.
- Led multi-year, multi-million-dollar initiatives that achieved significant improvements in operational productivity and risk mitigation.
- Applied Lean and Agile methodologies as a Six Sigma Green Belt certified professional to drive business process improvement.

ABOUT

Dr. La'Shana M. Wiggs is a dynamic leader and consultant with over 19 years of experience in organizational transformation, regulatory compliance, and leadership development. She specializes in helping organizations optimize workflows, enhance employee engagement, and achieve sustainable growth. Her expertise spans BSA/AML compliance, risk management, and the design of tailored leadership training programs.

EDUCATION | CERTIFICATIONS

**Doctorate in Business Administration (DrBA)
Concentration in Organizational Behavior and Leadership**

University of North Carolina at Charlotte

Executive MBA

University of Phoenix

Bachelor of Social Work (BSW)

Appalachian State University

- Certified Anti-Money Laundering Specialist (CAMS)
- Six Sigma Green Belt Certified

WORK HISTORY

Carter Development Group | 2023-Present

Savvi Consulting | 2022-Present

Wells Fargo | 2015-2022

US Bank | 2010-2015

Membership

Member, Academy of Management (AOM)

Member, Southern Management Association (SMA)

Member, Harvard Business Review Advisory Council



KIA-LEE BUSSEY, MSHRM

Certified Human Resource Professional
SPHR, SHRM-SCP, GPHR

ABOUT

Kia-lee is a certified Human Resources professional with over 20 years of progressive human resources, management and operations experience. Kia-lee has a Master's in Human Resources Management from Florida International University. She also maintains the Senior Professional in Human Resources (SPHR), Global Professional in Human Resources (GPHR) and SHRM Senior Certified Professional (SHRM- SCP) credentials.

EDUCATION | CERTIFICATIONS

Master of Science, Human Resource Management
Florida International University | 2013

Bachelor of Business Administration, Management Concentration in Human Resources
American InterContinental University | 2012

SHRM-Senior Certified Professional (SHRM-SCP)
Society for Human Resource Management | Jan 2015

Global Professional in Human Resources (GPHR)
Human Resource Certification Institute | June 2010

Prosci Certified Change Practitioner | Jan 2022

DEI in the Workplace Certificate | Oct 2021

HISTORY

Carter Development Group | 2022-Present
Ultimate Kronos Group | 2020-Present
Florida International University | 2018-Present
Ultimate Software | 2012-2020

Membership

Individual Member, HR People & Strategy (HRPS)
Professional Member, Society for Human Resource Management (SHRM)

QUALIFICATIONS

Human Resource Services

- Provide project-based and scalable HR Consulting Services to start-ups, small and mid-sized businesses in Broward, Palm Beach and Miami-Dade County.
- Managed a customer base of 60-65 enterprise customers, which included US, Canadian and global customers.
- Provided in-depth analysis, problem determination and timely resolutions and/or workarounds to resolve complex human resources and payroll issues. Served as the first point of contact for core UltiPro customer escalated issues.
- Created and managed all human resource functions to hire, retain and develop employees and managers
- Developed and administered human resource policies, programs, and practices.
- Formulated policies and procedures for the Corporation; recommend policies and practices to executive management
- Ensured compliance with all US state and federal regulations, and UK Labour Laws. One direct report.
- Administered bi-weekly and weekly payroll
- Developed and implemented employee job descriptions, employee handbook, manuals, policies and procedures
- Developed and implemented an employee opinion survey, employee focus groups and exit interview program
- Developed Employee Perks Program, which facilitated increased work-life balance
- Promoted in the first year from HR Administrator to HR Manager.
- Managed all human resource functions for all US locations.
- Item Writer, Human Resource Certification Institute (HRCI)



DEJANNAE LANG, PH.D.(C)

Industrial Organizational Psychologist

QUALIFICATIONS

Organizational Development and Training

- Direct and evaluate organizational assessment development, create DEI related assessment questions, tools, and consulting roadmaps.
- Develop professional trainings in leadership development, DEI, servant leadership, employee turnover and retention, employee engagement, and organizational culture.
- Craft recommendations for product lifecycle and market strategies.
- Advise and direct foundation on organizational development and leadership training.
- Lead various trainings, workshops, and networking events focused on DEI and human resource consultation.
- Content and website creation for Environmental, Social, Governance (ESG) factors. Implement and redesign of structure and strategies to launch newly formed ERG council.
- Strategic advisement on latest DEI /ESG factors to consider for group of councils, websites, etc
- Reevaluation of (Diversity Atlas) in various organizations. Instructional design fitted for all levels of an organization.
- Verified Predictive Index Practitioner, leads various trainings, workshops, or networking events to develop specific skills.

Human Capital Management

- Prepared documents, processed payroll, IT support, logistics, knowledge operations management, and conducted training design.

Core Strengths

- Strategic Planning
- Internal/External Consulting
- Project Management and Coordination
- Organizational Psychology
- Diversity, Equity, and Inclusion
- Human Resources
- Research Analyst

ABOUT

Skilled Industrial Organizational Psychology professional with extensive experience in Diversity, Equity, and Inclusion (DEI), organizational development, leadership development, and training operations. Expert in designing and implementing assessments, professional training, and organizational strategies. Proven ability to advise and consult with leadership, enhancing organizational performance and culture.

EDUCATION | CERTIFICATIONS

**Doctor of Philosophy (C)
Industrial Organizational Psychology**
Keiser University | Fort Lauderdale, FL

**Master of Science
Industrial/Organizational Psychology**
Florida International University | Miami, FL

**Bachelor of Arts
Psychology**
Florida International University | Miami, FL

Certifications

- Talent Optimization, Predictive Index, July 2021
- Diversity, Equity, and Inclusion in the Workplace, University of South Florida, May 2021

HISTORY

Carter Development Group | 2023-Present

Workzinga | 2022-Present

Skill Source Learning | 2019-Present

United States Air Force | 2012-2021

Dennis Kennedy | 2020-Present

Gene Holloway Consulting, LLC | 2020-Present

Minor Consulting Group | 2020-Present



DEXTER HUNT

Project /Organizational/Personnel Management,
& DEIB Trainer

QUALIFICATIONS

Project Management

- Adept at meeting budgetary objectives and making adjustments to project constraints based on financial analysis.
- Detail-oriented, critical thinker for process improvement, planning, and risk management.
- Agile to changes to the project scope, project schedule, and project costs using appropriate verification techniques to keep projects moving vertically.
- Experience with project management software tools.
- Displays strong project performance skills, specifically to analyze the successful completion of short and long-term goals.
- Coordinates internal resources and third parties/vendors to streamline execution of multiple projects.
- Possess solid organizational skills, including attention to detail and multitasking skills.

Organizational Management

- Developed strategies to drive business development and improve gross margins.
- Strict financial management, led to addition of 50% increase to reserves.
- Spearheaded new program developments. Implemented processes to secure government contracts on an annual basis.
- Managed a diverse team, drove employee engagement, and ensured compliance with heart-felt service standards.

Diversity, Equity, Inclusion, & Belonging Trainer

- Contributing writer and editor to six books on Inclusive Community Building.
- Conducted DEI training for local and international agencies.
- Developed customized DEI assessments and strategic planning tools for organizational development.

ABOUT

Professional with more than 25 years of expertise, in the areas of Personnel and Project management, human capital development, and DEI training. Mr. Hunt possesses strong planning, analytical and problem-solving skills. He is adept in communication, resource management, time management of which allows for efficient project completion, with an emphasis on meeting deadlines.

EDUCATION | CERTIFICATIONS

Bachelor of Arts - Anthropology
University of Florida | 1988 – 1993, 2017
Certified Scrum Master (CSMTM)

HISTORY

Carter Development Group | 2021 - current
ICB Productions | 2000-current
Vankara Academy | 1999-2000
HMS Host | 1997-1999

SKILLS

Project Management
Operations Management
Personnel Management
Staff Development
Workflow Coordination
Process Improvement
Cross-Functional Leadership
DEIB Training

Scope of Services

Project Understanding

Psychological safety, emotional intelligence, and a strong sense of belonging are critical to effective county governance—especially in diverse regions like Lake County, Illinois. Prioritizing these elements within governance structures helps ensure that policies genuinely reflect and respond to the needs of all residents. When embedded into employee engagement and organizational practices, these principles promote equitable access to opportunities and resources, foster stronger connections across generational and cultural lines, and support economic growth that benefits the entire community. Ultimately, they help deliver more equitable, responsive, and effective public services.

Recognizing the foundational importance of psychological safety and emotional intelligence, the County aims to establish a clear mission, vision, and set of strategic goals that reflect the community's needs and aspirations. To support this effort, the County seeks to engage its 2,500-member workforce through an employee engagement Organizational Assessment, identifying opportunities to strengthen workplace belonging and psychological safety. In addition, the County is seeking a detailed short- and long-term implementation roadmap that integrates its mission, vision, goals, and values into a cohesive and actionable strategic plan.

Accordingly, CDG has developed a 12–15 month implementation plan to deliver the full scope of work, guided by our 7-Step Strategic Planning Process. This plan incorporates Lake County's priorities, including recommendations for employee engagement roles and responsibilities, strategies to increase diversity in both workforce recruitment and supplier/vendor relationships, and an equity-focused assessment of current policies, marketing efforts, communications, and social media presence.

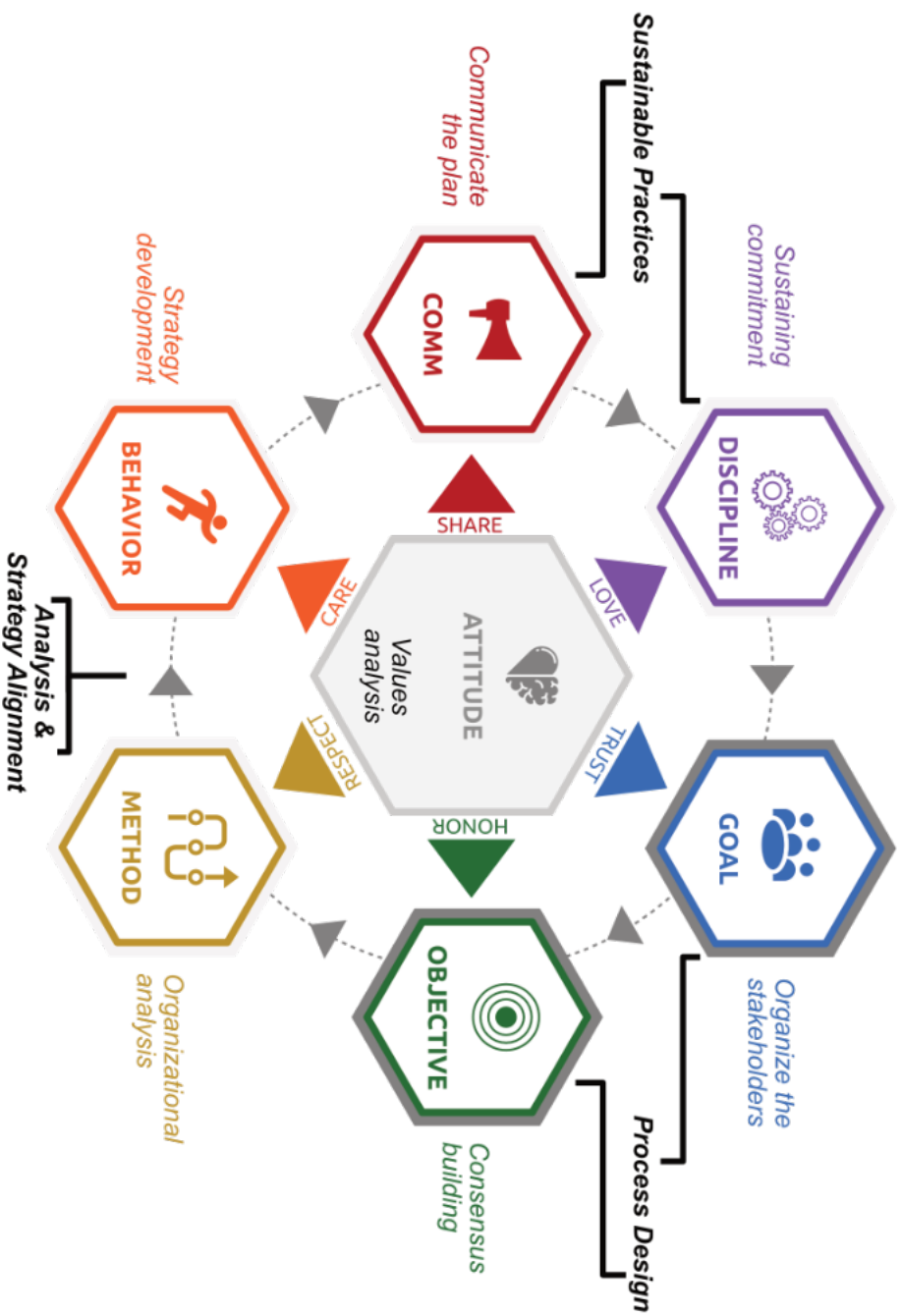
Work Plan

Based on the solicitation for consulting services, CDG has designed the following work plan using our signature approach, The Ellison Model 7-Step Strategic Planning Process. The seven steps are **Goal, Objective, Method, Attitude, Behavior, Communication, and Discipline**. The process is agile, adaptive, and forward-thinking. It also operates as a quantitative and qualitative tool. Our strategic planning methodology enables clients to

1. Explore their intentions.
2. Understand their stakeholders.
3. Commit to inclusive community building.
4. Take transformational action.
5. Manage change.

It promotes inclusive community building, prioritizing both people and process. It also streamlines the implementation of inclusive community building initiatives to ensure the attitude and value systems of psychological safety, emotional intelligence, and belonging are moved from theory to practice. The 7-step process also functions as a **change management tool** to guide the goals, objectives, methods, attitude, behavior, communication, and organizational discipline to sustainable practices for implementation.

THE ELLISON MODEL™ Inclusive Community Building 7-STEP STRATEGIC PLANNING PROCESS



Inclusion • Multicultural Appreciation • Mentorship • Conflict Resolution • Relationship Building

CDG has developed a 12-15 month work plan to execute the scope of work using our 7-Step Strategic Planning Process. The seven steps are categorized into three major categories: Process Design, Analysis & Strategy Alignment, and Sustainable Practices.

Process Design

This phase involves bringing the stakeholders together, fostering open communication and trust, and collectively deciding on the best path to approaching the organizational culture. It emphasizes teamwork, active participation, and equitable representation of engaged voices.

Analysis & Strategy Alignment

This phase involves an external analysis, internal goals and values analysis, and strategy development using various tools, including those developed by CDG along with common industry tools, including:

- O.K.R.A. Racial Harm Assessment Compass®
- Inclusive Community Building Equity Lens Questionnaire
- Leading Change SMART/GOMA/BEST Strategic Planning tool
- Common industry tools, such SWOT Analysis, PESTLE, Environmental Scans

Sustainable Practices

This phase involves developing sustainable practices to ensure the success and longevity of the strategic plan, including communication strategies, financials, personnel, key performance metrics, and progress monitoring.

Process Design

PROJECT MANAGEMENT

CDG will begin the project with two to three virtual meetings with the County's project management team to discuss and finalize the project approach, including:

Project goals	Objectives	Timeline	Resources	Dependencies
Milestones	Implementation Strategy	Risk Management	Quality Assurance	Legal and Compliance Considerations

Ongoing Meetings

CDG will host regular progress updates with the County leadership and other stakeholders. These updates will provide an opportunity to assess the project approach, identify early trends, and make necessary adjustments to ensure that expectations are met. By fostering consensus around the intended project outcomes, we empower the Library and CDG teams to collaborate effectively, navigate challenges proactively, and drive toward shared success. CDG will host regular project management meetings with the County project team or designee to clearly define the expectations and desired outcomes and ensure everyone involved has a shared understanding of the goals. We will

work with the County to establish clear accountability structures that define roles, responsibilities, and reporting lines. This framework will ensure that everyone involved is accountable for their part in achieving the desired outcomes. Additional meeting topics will include identifying pain points that have impacted employee engagement goals and determine the scope of short- and long-term actions.

Communication Plan

The communication plan is one of the most pivotal aspects of coordinating and executing an employee engagement initiative. Communication pieces create awareness, encourage participation, provide clarification of the process, and go a long way to building consensus. Most importantly, it helps to build trust throughout the process. Our project lead will work with your communication department to develop messaging in multiple formats and platforms for this project to promote staff involvement.

FINALIZING OBJECTIVES

Step 2 begins with a series of guided questions that examine the process, people, outcomes, alignment, and efficacy of organizational policies, practices, and initiatives using our Inclusive Community Building Lens questionnaire. Our firm will also review the County's previous strategic plans and organizational goals. This process will help streamline the strategic planning approach and provide organizational insight regarding the workforce, management practices, communication, transparency, and access, staff/external relationships, and continuous learning and staff development opportunities with an equity lens.

Analysis & Strategy Alignment

CDG is well-equipped to address Lake County's requirements while incorporating your preferred requests for an employment engagement Position recommendations and interest in job recruitment and supplier diversity. In this phase, CDG will work in close partnership with County leadership and key stakeholders to define and refine the mission, vision, goals, and values related to psychological safety and emotional intelligence. Drawing on our expertise, we will conduct a comprehensive Organizational Assessment using advanced tools such as the OKRA Compass®—gathering actionable insights through leadership interviews, surveys, and focus groups. These findings will directly inform the creation of a detailed short- and long-term implementation roadmap, outlining resource needs, clearly defined roles and responsibilities, and measurable success metrics.

This proposal includes targeted recommendations on employee engagement job roles and responsibilities, salary benchmarks, and organizational placement to optimize operational effectiveness. Furthermore, we will provide actionable strategies to enhance diversity in recruitment processes and supplier/vendor engagement while conducting an equity-focused review of existing policies, marketing, communications, and social media. CDG's tailored and inclusive approach will ensure a holistic strategy that addresses Lake County's specific initiatives and key areas of interest.

CDG has the expertise to complete the project in full. We have also developed a **strategic design** to complete the project.



COUNTY POLICY & COMMUNICATION ANALYSIS

CDG will begin its research process with an equity-focused review of 1) County policies, 2) marketing, communications, and social media, and 3) mission, goals, and values. The findings will help to inform the organizational assessment survey, focus groups, and the mission, vision, goals, and values assessment. An equity-focused review of policies, marketing, and communications is critical to ensuring that an organization's practices reflect its commitment to psychological safety, emotional intelligence, and belonging. Policies shape the operational framework of an organization, while marketing and communications influence public perceptions and internal culture. For Lake County, reviewing these elements through an equity lens ensures that systemic inequities are identified and addressed, that messaging is inclusive and representative of diverse communities, and that communication strategies align with goals. The policy and communication analysis will be conducted using CDG's proprietary O.K.R.A. Racial Equity Harm Assessment Compass. CDG will perform the following tasks:

Policy Review

- Identify key stakeholders, including County leadership, HR, legal, and department heads.
- Collect all relevant County policies, procedures, and practices for review.
- Collect relevant marketing campaigns, social media content, and communication assets.
- Establish criteria and tools for evaluating policies, marketing materials, and communication strategies (e.g., the OKRA Compass® for policy review).
- Assess policies for language, accessibility, and equity impacts.

Marketing, Communications, & Social Media Review

As part of the Marketing and Communications Processes, Goals, and Objectives, CDG will work with the County's marketing and public relations department to develop and leverage verbal, written, and visual employee engagement-branded communication and collaterals that provide an important counter-narrative that effectively communicates your commitment to equity and inclusion. Racism, marginalization, oppression, prejudice, xenophobia, and discrimination stem from deep-rooted imagery and narratives about Black, Indigenous, People of Color, LGBTQIA+ persons, persons with disabilities, and historically underrepresented groups. These social, political, and religious narratives reverberate between society at-large and institutions of power, impacting how leaders develop the organizational and community culture and draft legislation, policies, and procedures. CDG will perform the following tasks:

- Gather relevant documents marketing, social media content, and internal communication content.
- Establish criteria and tools for evaluating policies, marketing materials, and communication

strategies (e.g., the OKRA Compass® for policy review).

- Analyze marketing campaigns and materials to ensure they reflect diverse perspectives and avoid stereotypes or biases.
- Evaluate internal and external communications for inclusivity, accessibility, and alignment with messaging.

Mission, Goals, & Values

Review mission, goals, and values and develop questionnaire for employee engagement Assessment to assess staff perception of alignment with practice and organizational culture.

Deliverables:

- Policy Equity Analysis Report, including identified gaps and areas for improvement.
- Marketing, Communications, & Social Media Analysis Report, including identified gaps and areas for improvement.

ORGANIZATIONAL ASSESSMENT

CDG will work with its Researchers to conduct a comprehensive organization-wide assessment to gather data on employee demographics, perspectives, and experiences. The assessment will reveal to what extent staff, and leaders feel respected horizontally and vertically throughout the organization's culture. Results from the data collection will be analyzed to identify gaps in workforce engagement involving psychological safety, emotional intelligence, and belonging and recommend how to improve/close the gaps. Findings and recommendations will be presented to guide future actions.

Survey Design

CDG uses a robust survey tool that provides white-label branding, allowing for ease of trust from your employees. Our Research Strategists will create and test the organizational wide survey before distribution. The closed test will include CDG Team members and the County project team. This allows the survey to be previewed, receive feedback, and edited before distribution.

CDG uses a state-of-the-art system in its data collection and data analysis process. Our survey development, distribution, and data collection software is a cloud-based integrated feedback platform that combines the best of survey software technology with an extensible architecture and low-code design that make it fast and easy for business users to integrate with other systems. Our platform is a web-based SaaS solution, with mobile access and reporting. It provides translations for more than 100 languages. Security parameters include: Secure SSL connections, secure HTTP only cookies, customizable access and security controls, application level data encryption, data segmented by customer, ORM based security controls, privileged access controls, data input sanitization (XSS/SQL injection), and secure coding practices. Our software platform will house email addresses, distribute the survey to the list serve, and send reminders to staff who have not started or completed the survey using a unique URL per person and tracking cookies. Using this software platform, our firm will:

- Develop and distribute survey by email (and text message if preferred)
- Host and retain survey data
- Produce various survey reports types (cross-tab, comparisons, and summary)
- Register/sign-up for interviews
- Register/sign-up for focus groups

- Develop and store Consent to Participate form

Focus Groups (In-person or Virtual) & 1-on-1 Interviews (Virtual)

Following the survey analysis, CDG will conduct affinity-based and general staff focus groups and 45 minute one-on-one interviews to capture qualitative feedback. CDG uses semi-structured questions to encourage free flowing conversation. Each session usually lasts 90 mins with a maximum of 12 participants. Questions will be composed by the CDG Research Teams. Approximately ten (10) focus groups will be conducted. Approximately 15 one-on-one interviews will be conducted. Focus groups and interviews aim to understand the following critical areas:

- Staff's perception of belonging
- Staff's perception of County's branding and marketing communications
- Staff's perception of County's Mission, Vision, Goals, and Values alignment with organizational culture.

CDG will perform the following tasks for the quantitative and qualitative assessments:

- Collaborate with leadership to establish specific goals for the assessment.
- Design employee engagement organizational assessment.
- Develop and distribute anonymous surveys to gather quantitative data on employee perceptions, experiences, and engagement related to psychological safety, emotional intelligence, and belonging.
- Conduct focus groups and one-on-one interviews with diverse employee groups and leadership to capture qualitative insights.
- Conduct qualitative and quantitative analysis tools to identify themes, trends, and areas of concern.
- Compare current employee engagement practices against the County's goals and benchmarks to identify gaps and opportunities.

Deliverables:

- Employee Engagement Organizational Assessment Report.

CLARIFYING MISSION, VISION, GOALS, AND VALUES

Defining and clarifying an organization's mission, vision, goals, and values is essential for establishing a shared understanding of its commitment to psychological safety, emotional intelligence, and belonging. For Lake County, this foundational step ensures that principles are embedded in its operational culture and decision-making processes. CDG will perform the following tasks:

- Distribute surveys and conduct interviews with employees, leadership, and community representatives to understand their perspectives and priorities. [Included in the Employee Engagement Assessment Survey, Focus Groups, & Surveys]
- Synthesize data from all sources to identify key themes, priorities, and areas for alignment with organizational and community goals.
- Compare draft statements against Lake County's strategic goals and community priorities to ensure cohesion.
- Finalize alignment review and make updates to mission, vision, goals, and values.
- Facilitate leadership reviews and incorporate final revisions.

Deliverables:

- Final Mission, Vision, Goals, and Values Statement

JOB ROLES & RESPONSIBILITIES ALIGNMENT

Defining job roles, responsibilities, salary benchmarks, and organizational placement is critical to operationalizing psychological safety, emotional intelligence, and belonging within an organization. These roles serve as the foundation for implementing, monitoring, and sustaining psychological safety, emotional intelligence, and belonging initiatives, ensuring they are not seen as ancillary but as integral to achieving organizational objectives. Salary benchmarks ensure equitable compensation practices, attract top talent, and demonstrate commitment to fairness. Strategic placement within the organizational hierarchy ensures that organizational development leaders have the authority, resources, and support necessary to drive meaningful change. CDG will perform the following tasks:

- Draft clear descriptions of roles, including required qualifications, responsibilities, and reporting structures.
- Conduct a market analysis of comparable roles in similar government and organizational settings.
- Propose salary ranges that are competitive, equitable, and aligned with the County's budget and pay structure.
- Map the County's existing hierarchy to determine optimal placement of roles for maximum influence and integration.
- Propose reporting lines and interfaces between roles and other departments to ensure collaboration and effectiveness.

Deliverables:

- Organizational Placement and Reporting Structure Recommendations.

HUMAN RESOURCE RECRUITMENT & ONBOARDING ANALYSIS

Enhancing diversity in recruitment processes is essential to strengthening recruitment practices to attract a broad range of talent helps create a workplace that reflects the community's demographics, experiences, and perspectives. Bringing in individuals with varied backgrounds enhances innovation, improves decision-making, and contributes to overall organizational effectiveness. Fair and transparent hiring processes help minimize bias, expand access to opportunities, and ensure the organization draws from the widest possible talent pool. For Lake County, these efforts align with its broader mission and reinforce its commitment to accountability, community trust, and operational excellence.

CDG will perform the following tasks:

- Host meetings with HR stakeholders and department leaders to review HR Recruitment and Onboarding processes.
- Collect all relevant County HR onboarding and recruitment policies.
- Review job descriptions for inclusive language that emphasizes the County's commitment to psychological safety, emotional intelligence, and belonging.

- Review job postings boards used by the County.
- Review interview guidelines.
- Review stay and exit interviews.
- Develop metrics to track diversity outcomes in recruitment over time.

Deliverables:

- Recommendations on Revised Job Descriptions and Posting Templates.
- Recommendations on Talent Sourcing Partnership Plan.
- Recommendations on Candidate Evaluation and Interview Guidelines.
- Recommendations on Refined Recruitment Process Guidelines.

SUPPLIER/VENDOR DIVERSITY ASSESSMENT

Enhancing supplier and vendor engagement is essential for fostering economic equity and inclusion, promoting diversity in procurement, and ensuring that all businesses—especially those owned by underrepresented groups—have access to opportunities. For Lake County, engaging a diverse range of suppliers and vendors aligns with its mission, strengthens community ties, and drives innovation by leveraging the unique perspectives and capabilities of a broader supplier base. Additionally, improving supplier diversity can enhance competition, reduce costs, and demonstrate a commitment to social responsibility. Our CDG Business Development Consultant will oversee this work.

CDG will perform the following tasks:

- Assess existing policies, procedures, supplier engagement strategies and procurement data for trends indicating inequities or barriers.
- Conduct surveys and interviews with vendors and procurement staff to identify areas for improvement.
- Create targeted strategies to engage minority-owned, women-owned, veteran-owned, and other underrepresented businesses.

Deliverables:

- Supplier Diversity Assessment Report & Feedback and Improvement Plan

Sustainable Practices

IMPLEMENTATION ROADMAP

An implementation roadmap is a critical tool for transforming Lake County's mission, vision, goals, and values into actionable, measurable outcomes. It ensures a structured and strategic approach to embedding psychological safety, emotional intelligence, and belonging principles into operations while taking into account the County's resources and readiness. A well-defined roadmap provides clear timelines, roles, and responsibilities, enabling stakeholders to track progress and measure success. The granular short-term plan addresses immediate priorities and builds momentum, while

the long-term roadmap ensures sustainability and alignment with broader organizational objectives.

CDG uses its **Leading Change SMART/GOMA/BEST Strategic Planning Tool** to develop its strategic approaches for implementation. The combination of these tools provide the specificity of SMART goals with the in-depth, inclusive community building approach of the 7-Step process. It also develops key performance indicators for progress monitoring to do your B.E.S.T. work.

CDG will perform the following tasks:

- Focus on actionable initiatives that can be implemented within 12-18 months, such as training programs, policy revisions, and communications updates.
- Break down short-term priorities into specific tasks with assigned deadlines and responsible parties.
- Establish KPIs for tracking progress.
- Align long-term goals with Lake County's mission, vision, and values, focusing on systemic change.
- Include initiatives such as embedding into organizational culture, enhancing supplier diversity, and creating ongoing professional development programs.
- Share draft roadmaps with stakeholders to gather input and ensure alignment with organizational goals.
- Prepare the organization for long-term initiatives by addressing resource gaps and training needs.

Deliverables:

- Short-Term Roadmap Document, including tasks, timelines, roles, and metrics.
- Long-Term Roadmap Document, including multi-year initiatives, resource requirements, and evaluation framework.

COMPREHENSIVE REPORT

Finally, CDG will prepare a comprehensive report, including an executive summary of the findings, recommendations for embedding inclusive policies, short-term action steps, long-term goals, an implementation plan, and methods for monitoring and evaluating progress. This report will include:

- A comprehensive written report that outlines the entire assessment process, including key findings, themes, and analysis of organizational gaps.

S.M.A.R.T. /GOMA/BEST STRATEGIC PLANNING TOOL			
S	What is the specific , sensible, and significant initiative?		
M	What is the measurable indicator(s) of quantifiable success?		
A	What is the availability of personnel, skills, tools, and funding to make this project attainable ?		
R	What relevant data or information supports the worthiness of the project?		
T	What is the timeframe of implementation, phases, and completion?		
G	Goal: Identify guiding community building policy usually represented through federal, state, institutional, or agency policy.		
O	Objectives: Identify unifying outcomes that improves/enhances the community.		
M	Method: Identify a specific task that respectfully executes the inclusive community building policy and unifying objectives.		
A	Attitude: Identify organizational principles or values that guide this project.		
B	Behavior: Identify important tasks needed to launch this project.		
C	Communication: Identify key stakeholders for internal and external communication plan.		
D	Discipline: Identify sustainable practices through funding, project management, and best practices.		
DO YOUR B.E.S.T. WORK.			
B	What milestones indicate the project is ready to launch?	E	What milestones indicate the project is evolving into meeting the objectives?
		BEGINNING	EVOLVING
S	What measurable outcomes indicate the project is satisfying the objectives?	T	What measurable outcomes indicate the project is transforming the community?
		SATISFYING	TRANSFORMING

- Recommendations for closing the identified gaps and building upon the current organizational structure to foster a more inclusive culture.
- Actionable short-term and long-term goals using the Leading Change SMART/GOMA/BEST Strategic Planning Tool, detailing how new inclusive policies and practices can be embedded into the County's culture.
- Methods for monitoring and evaluating progress on psychological safety, emotional intelligence, and belonging goals, including staff education, employee surveys, and other measurement techniques.
- Include timelines, deliverables, and the effort required for each component of the recommendations.
- A concise executive summary that highlights the key findings of the assessment, recommendations, and next steps.
- Review the entire report with the County's leadership and stakeholders, incorporating any final feedback or adjustments.
- Finalize the comprehensive report, executive summary, recommendations, and implementation plan.

CDG's Ability to Perform

The Ellison Model (TEM) is Carter Development Group's foundational program design framework, developed to foster environments centered on psychological safety, emotional intelligence, and a strong sense of belonging. Built on this model, CDG has created a robust suite of operational tools to support organizations in aligning their internal culture and practices with these priorities. Our approach has been successfully implemented with clients such as the University of Washington, the Public Library of Brookline (MA), and the Maine Juvenile Justice Advisory Group. At the core of this suite is the **O.K.R.A. Racial Harm Assessment Compass®**, a flagship tool designed to evaluate and strengthen programmatic effectiveness across departments. This tool will be thoughtfully adapted to meet the specific needs of Lake County, ensuring relevance, impact, and measurable progress.

CDG has also developed the **Inclusive Community Building (ICB) Equity Lens Questionnaire**, which includes questions guiding users toward an equitable perspective of policies, practices, and initiatives. The tool will be adapted to the County's needs. CDG has also conducted a policy review for **equitable language** across department policies for the California Department of Child Support Services. We can do the same for program proposal and selection process/criteria. CDG audited the economic development departments of the City of Asheville, NC, and Buncombe County, NC, and reviewed the **Supplier Diversity Programs** for the University of Washington. In both cases, CDG identified gaps and made recommendations for best practices.

CDG has also developed the **Leading Change SMART/GOMA/BEST Strategic Planning Tool**, a goal and metric tracking tool that incorporates SMART Goals, The Ellison Model 7-Step Strategic Planning Process, and a metric and key performance indicator section referred to as doing your B.E.S.T. work. CDG will provide a structured implementation framework, including timelines, milestones, and responsible parties for each action item. This ensures the plans are actionable and progress can be tracked effectively.

Implementation Plan

As indicated in the RFP, Lake County prefers a proposal inclusive of recommendations on employee engagement job roles and responsibilities, increasing diversity in Lake County job recruitment as well as its suppliers/vendors. Additionally, Lake County is seeking an equity lens assessment of current policies, marketing, communications, and social media. Accordingly, CDG has developed a 12-15 month implementation plan to execute the full scope of work using our 7-Step Strategic Planning Process.

CDG will need Lake County's assistance with the following:

- Staff emails for Employee Engagement Organizational assessment
- Key stakeholders, including County leadership, HR, legal, and department heads
- Data collection of relevant County policies, procedures, and practices for review
- Data collection of relevant marketing campaigns, social media content, and communication assets
- Identify stakeholders for focus groups and one-on-one interviews
- Scheduling and managing communication to focus group and interview participants, including room location for on-site focus groups.

Timeline	Month	Key Personnel
Project Management	Month 1-12	Peta-Gaye Lysius
County Policy	Month 2-3	Brenda Mills
Communication Analysis	Month 2-3	Zenitra Perry
Employee Engagement Organizational Assessment	Month 3-5	Dejannae Lang, Brenda Mills
Clarifying Mission, Vision, Goals, and Values	Month 5-6	Zenitra Perry
Job Roles & Responsibilities Alignment	Month 6-7	Lonney Gregory
Implementation Roadmap	Month 10-11	Dr. Adrian N. Carter Zenitra Perry
Comprehensive Report	Month 12	Dr. Adrian N. Carter
Optional Services	Month 13-18	Carter, Gregory, Lang

Major Tasks Summary

Project Management	Project Kick-off; Host Process Alignment meetings with the County Project Team
	Finalize Timeline and Communications Plan Cadence
	Develop Communication Plan & Draft communication pieces
	Establish criteria and tools for evaluating policies, marketing materials, and communication strategies
County Policy & Communication Analysis	Assess policies for language, accessibility, and equity impacts
	Analyze marketing campaigns and materials to ensure they reflect various perspectives
	Develop Policy Equity Analysis Report
	Develop Marketing, Communications, & Social Media Analysis Report
	Review mission, goals, and values; develop questionnaire for Employee Engagement Assessment
Employee Engagement Organizational Assessment	Design employee engagement organizational assessment
	Test survey & Finalize technical development
	Distribute and monitor survey
	Conduct analysis and develop recommendations
	Host ten (10) focus groups (in-person)
	Conduct ten (15) one-on-one interviews (virtual)
	Conduct County's goals and benchmarks gap analysis
	Develop Organizational Assessment Report with recommendations
Clarifying Mission, Vision, Goals, and Values	Synthesize data to identify key themes, priorities, and areas for alignment
	Compare findings against Lake County's strategic goals and community priorities
	Finalize alignment review and make updates to mission, vision, goals, and values
	Facilitate leadership reviews and incorporate final revisions
Job Roles & Responsibilities Alignment	Develop Organizational Placement and Reporting Structure Recommendations
HR Recruitment & Onboarding Analysis	Collect data and analyze recruitment and onboarding process
	Develop recommendations on HR recruitment and onboarding process
Supplier/Vendor Diversity Assessment	Assess existing policies, procedures, past procurement data, and supplier engagement strategies
	Conduct surveys and interviews with vendors and staff
	Create targeted strategies to engage underrepresented businesses
Implementation Roadmap	Develop Supplier Diversity Assessment Report
	Develop Short-Term Roadmap Document
	Develop Long-Term Roadmap Document
Comprehensive Report	Develop & finalize comprehensive report, executive summary, and implementation plan
	Review the report with leadership and incorporate final feedback
TEM Certificate	The Ellison Model Inclusive Leadership Certificate Training Program

Key Personnel Role

The scope of work indicated eight major areas of work:

Organizational Assessment	Human Resource Recruitment & Onboarding Analysis
Statement of Mission, Vision, Goals, & Values	Strategic & Creative Communications Analysis
County Policy Analysis	Suppliers/Vendors Diversity Analysis
Job Roles & Responsibilities	Implementation Roadmap

Our key personnel include four municipal experts in employee engagement, human resources, data analysis, and strategic planning. Our research strategists are responsible for developing assessment tools, interpreting data, identifying best practices, developing professional development protocols, and drafting the final report. Our communication strategies may include branding and marketing initiatives to develop narrative-shifting strategies for organizational transformation. Our project management team will have specific roles in managing tasks and project deliverables. Based on our team's expertise, the following tasks have been assigned:

Dr. Adrian N. Carter, Project Lead / Research Strategist

- Coordinate communication plan.
- Conduct County policy analysis using the OKRA Racial Equity Harm Assessment Compass® to identify systemic inequities.
- Develop short- and long-term implementation roadmaps, including clear timelines, roles, and metrics.
- Ensure alignment of all deliverables with the County's overarching objectives and strategic goals.

Lonney Gregory, Learning & Development Strategist / Research Strategist

- Define job roles and responsibilities, ensuring alignment with the organizational chart.
- Recommend salary benchmarks and interaction models for roles across departments.
- Provide guidance on integration within workflows and organizational structures.
- Develop short- and long-term implementation roadmaps, including clear timelines, roles, and metrics.

Brenda Mills, Supplier Diversity Specialist

- Conduct County policy analysis using the O.K.R.A. Racial Equity Harm Assessment Compass® to identify systemic inequities.
- Develop short- and long-term implementation roadmaps, including clear timelines, roles, and metrics.

Dr. La'Shana Wiggs, Business Development Consultant

- Evaluate current supplier diversity and vendor recruitment practices.
- Develop strategies to increase diversity among suppliers and vendors.
- Recommend metrics to monitor and improve supplier diversity initiatives.

- Conduct County policy analysis using the OKRA Racial Equity Harm Assessment Compass® to identify systemic inequities.
- Develop short- and long-term implementation roadmaps, including clear timelines, roles, and metrics.

Kia-lee Faison-Bussey, Human Resource Consultant

- Assess current recruitment and onboarding processes to identify opportunities for increasing diversity.
- Review and analyze stay and exit survey data to inform actionable recruitment and retention strategies.
- Develop and propose strategies to enhance inclusivity in HR practices.
- Develop short- and long-term implementation roadmaps, including clear timelines, roles, and metrics.

Dejannae Lang, Industrial-Organizational Psychologist & Trainer / Research Strategist

- Design and administer workforce surveys, focus groups, and interviews for the Employee Engagement Organizational Assessment.
- Analyze qualitative and quantitative data to assess organizational culture, engagement, and inclusivity.
- Compile findings into a comprehensive Employee Engagement Assessment Report.
- Develop short- and long-term implementation roadmaps, including clear timelines, roles, and metrics.

Zenitra Perry, Strategic Communications Specialist

- Develop and facilitate workshops to define mission, vision, goals, and values.
- Review internal and external communications, including marketing, social media, and leadership messaging, for alignment with psychological safety, emotional intelligence, and belonging objectives.
- Conduct interviews and focus groups to assess perceptions and effectiveness of communication strategies.
- Develop a comprehensive psychological safety, emotional intelligence, and belonging-focused communications plan.
- Develop short- and long-term implementation roadmaps, including clear timelines, roles, and metrics.

Project Manager

- Oversee the CDG project team, ensuring all deliverables are completed on time and within scope.
- Using project management software, Mr. Hunt will delegate tasks, track progress, develop milestones, and facilitate communication.
- Coordinate team efforts to ensure alignment with project goals and milestones.
- Oversee quality assurance, track progress, and ensure timely delivery of all project objectives.

REFERENCES

List below other similar size clients for whom you have provided similar services. Please include the email address for each reference.

Agency Name: Buncombe County, NC
Mailing Address: 200 College St, Asheville, NC 28801
Contact Person/Title: Dr. Noreal Armstrong, Chief Equity and Human Rights Officer
Phone Number: (828) 250-6523
Email: Noreal.Armstrong@buncombecounty.org
Dates of Service: August 2023-April 2024
Project/Service Provided: Racial Equity Comprehensive Audit
Number of Employees: 2000

Agency Name: California Department of Child Support Services (DCSS)
Mailing Address: P.O. Box 419064, Rancho Cordova, CA 95741-9064
Contact Person/Title: Dr. Andre J. Lockett, Chief Equity Officer
Phone Number: (901) 949-0871
Email: Andre.Lockett@dcss.ca.gov
Dates of Service: August 2023-December 2024
Project/Service Provided: Racial Equity Audit for Child Support Services
Number of Employees: 4300

Agency Name: University of Washington Facilities (Seattle, WA)
Mailing Address: 4515 25th Ave NE, Seattle WA 98105
Contact Person/Title: Sarah Lewis-Assink, DEI Manager
Phone Number: 206.221.6110 (office) 253.266.3817 (cell)
Email: sarahla1@uw.edu
Dates of Service: July 2022-present
Project/Service Provided: DEI Consultant to Analyze, Recommend, and Implement Strategic Changes
Number of Employees: 1100

Agency Name: Maine Juvenile Justice Advisory Group
Mailing Address: State House Station 111, Augusta, Maine 04333-0111
Contact Person/Title: Linda Barry Potter, Juvenile Justice Specialist
Phone Number: (207) 707-2698
Email: Linda.Barry.Potter@maine.gov
Dates of Service: July 2022-July 2024
Project/Service Provided: Racial Equity Training & Strategic Planning to meet federal mandates for Juvenile Justice Programs
Number of Employees: 24

Exceptions to the RFP

There are no exceptions to the RFP.

PROPOSAL PRICE SHEET

THE PRICE PROPOSAL SHALL INCLUDE A TOTAL PRICE AS A FIXED FEE FOR ALL SERVICES DELINEATED IN THIS RFP. THE PROPOSER WILL CONSIDER ALL COSTS (LABOR, OVERHEAD, ADMINISTRATION, PROFIT, TRAVEL, ETC.) ASSOCIATED WITH PROVIDING THE SERVICES LISTED IN THIS RFP. ANY HOURLY RATES FOR SERVICES THAT MAY NOT BE INCLUDED SHALL BE PROVIDED WITH THE CORRESPONDING SERVICE AND RATE.

All additional services beyond the initial scope of the project, identified by the Proposer as beneficial to the County, shall be delineated separately for the County to consider.

The quote will consider all costs (labor, material, overhead, administration, profit, travel, etc.) associated with providing the services listed in this RFP. (Please attach additional sheets if necessary)

Action Item	Proposed Price	Number of Hours
DEI Mission, Vision, Goals and Values	\$8,600.00	40
Organizational Assessment	\$30,745.00	143
Short and Long-Term Implementation Roadmap	\$17,200.00	80
DEI Job Roles & Responsibilities Alignment	\$6,450.00	30
Policy, Communications, HR Recruitment, & Supplier Diversity Assessment, & Comprehensive Report + Project Management	\$73,315.00	341
Travel	\$6,000.00	
TOTAL:	\$136,310.00	634

Please indicate any hourly rates for services that may not be included in the original scope of the RFP. (Please indicate below the positions and hourly rates.)

Position	Rate for Service
DEI Expert & Senior Consultant	\$250/hour
DEI Executive Coach	\$250/hour
People & Culture Strategist	\$150/hour

Please delineate any service rates that may not be included in the original scope of the RFP.

Service	Proposed Price
Inclusive Leadership Certification Training	\$30,000.00

Proposal Price Sheet - B (Updated)

Deliverables	Hours	Cost
Project Management	50	\$10,750.00
County Policy & Communication Analysis	108	\$23,220.00
Employee Engagement Organizational Assessment	143	\$30,745.00
Clarifying Mission, Vision, Goals, and Values	40	\$8,600.00
Job Roles & Responsibilities Alignment	30	\$6,450.00
Implementation Roadmap	80	\$17,200.00
Comprehensive Report	25	\$5,375.00
Travel		\$6,000.00
Total	486	\$108,340.00

Optional Services	Hours	Cost
Project Management	26	\$5,590.00
HR Recruitment & Onboarding Analysis	44	\$9,460.00
Supplier/Vendor Diversity Assessment	104	\$22,360.00
Implementation Roadmap	80	\$17,200.00
Inclusive Leadership Certification Training	24	\$30,000.00
Total	278	\$84,610.00

Value Added Services

THE ELLISON MODEL INCLUSIVE LEADERSHIP CERTIFICATE TRAINING PROGRAM

Many leaders are challenged by the topic of inclusive community building, such as:

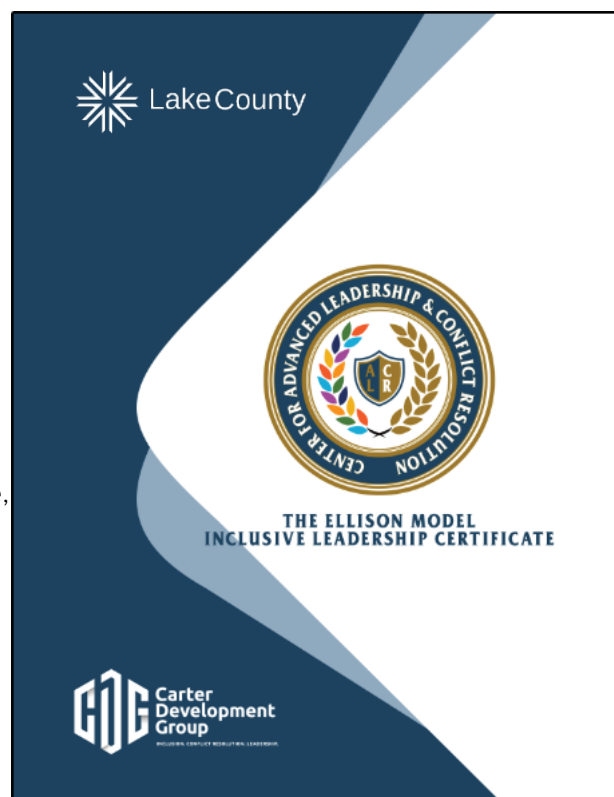
- How do you incorporate psychological safety, emotional intelligence, and belonging throughout the organization?
- What role do I play as a leader?
- What exactly do you call it—it's become an alphabet soup?
- What political implications will this have within the organization?
- Who should lead the psychological safety, emotional intelligence, and belonging initiatives?

The Ellison Model (TEM) organizes, simplifies, and produces depth of knowledge to strategically plan and implement change for psychological safety, emotional intelligence, and belonging. Our first step is to synthesize the efforts of psychological safety, emotional intelligence, belonging, and other popular terms under one name: inclusive community building (ICB).

The Ellison Model's social development framework for inclusive community building is a transformational process for the *being* and *doing* of leaders that translates into organizational, institutional, and community growth. TEM enhances strengths-based leadership, performance management, talent development, human skill development, emotional intelligence, and effective communication. Most importantly, TEM is a character development tool that emphasizes its principles of trust, honor, respect, care, share, and love.

Designed for a cohort of up to **25 Leaders**.

Who should prioritize earning The Center's Inclusive Leadership Certificate:



Executive and
Senior Leaders

Middle
Managers

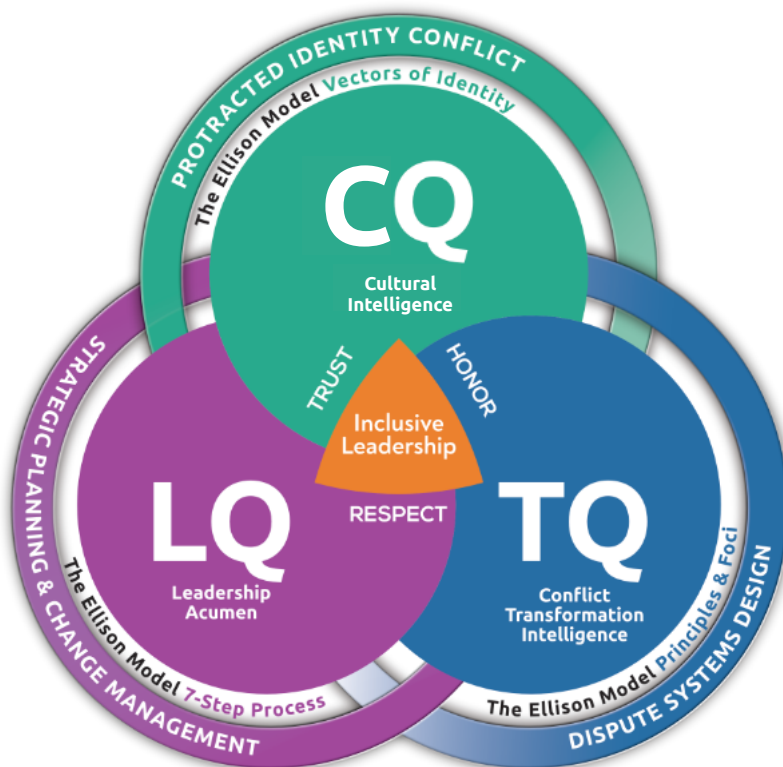
Human
Resource
Teams

Employee
Resources
Groups

1 CULTURAL INTELLIGENCE (CQ)

Cultural intelligence (CQ) refers to your knowledge and understanding of race and structural inequities such as racism, discrimination, marginalization, oppression, and the physical, psychological, and emotional impact of these structures. The CQ pathway is a set of introductory workshops that review the history and causality of structural, institutional, internalized, and interpersonal racism and how it results in direct, psychological, and cultural violence. This pathway will increase the participant's ability to recognize acts of exclusion in county government.

The Ellison Model Inclusive Leadership Framework



2

CONFLICT TRANSFORMATION INTELLIGENCE (TQ)

Conflict transformation intelligence (TQ) refers to your self-awareness, character development, and the importance of relationship-building with yourself and others. In the TQ pathway, participants engage in skill-building activities to dispel their socialized and internalized narratives of hierarchy and competition to make room for the holistic, inclusive characteristics that promote integrity, respect, and conflict transformation.

3 LEADERSHIP ACUMEN (LQ)

Leadership acumen (LQ) refers to your ability to mobilize others and the organization toward sustainable, inclusive community-building practices and measurable outcomes. The leadership acumen pathway provides participants with strategic planning and change management tools. It helps them develop their leadership acumen with actionable items to shift the organizational culture.

Sustainability Statement

Carter Development Group (CDG) is committed to advancing sustainability through environmentally responsible practices. As a fully remote organization, CDG significantly reduces its carbon footprint by minimizing commuting and office-related emissions. This approach not only supports environmental stewardship but also ensures operational efficiency and flexibility.

Key Sustainability Practices

- Operating remotely eliminates the environmental impact of daily commuting and reduces energy and resource consumption typically associated with physical office spaces.
- CDG has implemented a paperless policy, conducting all project documentation, communications, and deliverables electronically.

Cost and Life Cycle Considerations

CDG's remote operations and digital workflows inherently reduce project costs by eliminating travel expenses and minimizing material usage. These practices not only contribute to sustainability but also offer long-term financial efficiency.

GENERAL INFORMATION SHEET


AUTHORIZED NEGOTIATORS:

Name: Dr. Adrian N. Carter	Title: CEO & Principal Consultant
Phone: 954-806-8658	Email: drcarter@carterdevgroup.com
Name: Dexter Hunt	Title: Project Manager
Phone: 305-710-2592	Email: dhunt@carterdevgroup.com

BUSINESS ORGANIZATION: (check one only)

- ☐ Sole Proprietor: An individual whose signature is affixed to this proposal.
- ☐ Partnership: State full names, titles, and addresses of all responsible principals and/or partners on attached sheet.
- ☒ Corporation: State of incorporation: Florida
- ☐ Non-profit Corporation
- ☐ 501c3-- U.S. Internal Revenue Code

By signing this proposal document, the proposer hereby certifies that it is not barred from responding on this contract as a result of a violation of either Section 33E-3 or 33E-4 of the Illinois Criminal Code of 1961, as amended.

Full Legal Business Name: Carter Development Group	
Authorized Signature: 	Date: 12/15/2024
Printed Name/Title: Dr. Adrian N. Carter, Ph.D., CEO	

VENDOR DISCLOSURE STATEMENT

Vendor Name:	Carter Development Group, LLC		
Address:	7875 NW 57th Street #25294, Tamarac, FL 33320		
Contact Person:	Dr. Adrian N. Carter, Ph.D.	Phone #:	954-806-8658
Bid/RFP/SOI/Contract/Renewal:	RFP #25158 - DEI Assessment		

Vendors wishing to contract with Lake County for goods and services in an amount greater than \$30,000 shall submit this form in advance of award. This disclosure statement is not required for utility companies regulated by the Illinois Commerce Commission or local units of government. Vendors shall disclose:

- A familial relationship between a Lake County elected official, department director, deputy director and manager and owners, principals, executives, officers, account managers or other similar managerial positions of the vendor's company. Familial relationship is defined as a spouse (including civil partner), child, stepchild, parent, stepparent, grandparent, in-laws (including parent, grandparent, sibling, or child), relatives and non-relatives living in the same residence, and offspring born to any aforementioned person.
- All political campaign contributions made by the vendor or an owner, principal, executive, officer, account manager, or other similar managerial position of the vendor to any county board member, county board chair, or countywide elected official within the last five years.

If there is nothing to report in a section, please state **NONE** in the appropriate space.

FAMILIAL RELATIONSHIPS

List names and departments/agencies of Lake County employees or public officials with whom owners, principals, or officers of the vendor's company have a familial relationship and the nature of the relationship. Attach additional pages, as necessary. (Provide all names or state **NONE** in the space below. Do not leave blank.)

Name and Department/Agency of Lake County Employee/Public Official	Familial Relationship
NONE	


CAMPAIGN CONTRIBUTIONS

List campaign contributions that have been made within the last five years that exceed \$150 annually. Attach additional pages, as necessary. (Provide all names or state **NONE** in the space below. Do not leave blank.)

Recipient	Donor	Description (e.g., cash, type of item, in-kind service, etc.)	Amount/Value	Date Made
NONE				

Continuing disclosure is required if information changes. This Vendor Disclosure Statement form is available at www.lakecountyil.gov. The full text of the County's Ethics and Procurement policies and ordinances are available at www.lakecountyil.gov.

I hereby acknowledge that the information above is accurate and complete, that I am an authorized signer on behalf of the vendor, that I have read and understand these disclosure requirements, and that I agree to update this information if there are any related changes by submitting a new Vendor Disclosure Statement.

Authorized Signature:		Title:	CEO & Principal Consultant
Printed Name:	Dr. Adrian N. Carter	Date:	12/15/2024


☐ Vendors: Check this box when indicating exception. Then provide a brief narrative for exception below.



VENDOR CERTIFICATION FORM

Bid/RFP/SOI Number:	RFP #25158 - DEI Assessment		
Vendor Name:	Carter Development Group, LLC		
Address:	7875 NW 57th Street #25294, Tamarac, FL 33320		
Primary Contact Name:	Dr. Adrian N. Carter		
Primary Contact Email Address:	drcarter@carterdevgroup.com		
Primary Contact Phone Number:	954-806-8658		
Project Manager Name:	Dexter Hunt		
Project Manager Email Address:	dhunt@carterdevgroup.com		
Project Manager Phone Number:	305-710-2592		
# Years in Business:	13.5	Number of Employees:	4
Annual Sales:	\$ 350,000.00	Dunn & Bradstreet #:	039745586
Vendor Certification Statement: Please identify all the following that apply to the ownership of this firm. This information is collected for reporting purposes only and not vendor selection. Please include a copy of the certification. (Definitions are included on the second page of Vendor Certification Form).			
<input checked="" type="checkbox"/>	Contractor certifies as a Minority – Business Enterprise (MBE)		
<input type="checkbox"/>	Contractor certifies as a Women Business Enterprise (WBE)		
<input type="checkbox"/>	Contractor certifies as a Veteran-Owned (VBE) Business Enterprise		
<input type="checkbox"/>	Contractor certifies as a Persons with Disabilities Owned Business Enterprise (PDBE)		
<input type="checkbox"/>	Contractor certifies as a Service-Disabled Veteran-Owned (SDVBE) Business Enterprise		
<input type="checkbox"/>	Contractor certifies as a Business Enterprise Program (BEP)		
<input type="checkbox"/>	Contractor certifies as a Small Disadvantaged Businesses (SDB)		
<input type="checkbox"/>	Contractor certifies as a Veteran-Owned Small Business (VOSB)		
<input type="checkbox"/>	Local Business		
<input type="checkbox"/>	None		
Other (Specify)	Federal 8(a)		
Certification Number:			
Certified by (Agency):	US Small Business Administration		

I certify that this information is accurate to the best of my knowledge and that I am authorized to provide this information on behalf of my company.

Signature:		Date:	12/15/2024
Printed Name:	Dr. Adrian N. Carter	Title:	CEO & Principal Consultant



Addendum Acknowledgement

The undersigned acknowledges receipt of the following addendum(s):

ADDENDUM #
1

I have examined and carefully prepared the submittal documentation in detail before submitting my response to Lake County.

Submittal Number: RFP #25158 - DEI Assessment

Company Name: Carter Development Group, LLC

Authorized Signature: 

Printed Name/Title: Dr. Adrian N. Carter

Date: 12/14/2024

It is the vendor's responsibility to check for addendums, posted on the website at <http://lakecountypurchasingportal.com> prior to the submittal due date. No notification will be sent when addendums are posted unless there is an addendum posted within three business days of the submittal due date.

If the submittal has already been received by Lake County, vendors are required to acknowledge receipt of addendum via email to purchasing@lakecountyil.gov prior to the due date.

Submittals that do not acknowledge addendums may be rejected.