

ED Evaluation Proposal Bids		
Consultant/Firm name	Total Cost Proposal	Notes
Kinetic Flow 4363 Bonita Road #323 Bonita, CA 91902	\$19,620.00 for a three (3) year contract	Year 1 = \$9,840.00 Year 2 = \$4,890.00 Year 3 = \$4,890.00
Avion Consulting 4142 Adams Avenue San Diego, CA 92116	\$57,000 for a three (3) year contract	All Services other than Admin. = \$24,000.00 Administration of 360-degree survey = \$500.00 Design of custom 360-degree survey = \$4,000.00
3D Group 2030 St., Suite 650 Berkley, CA 94704	\$17,000 - \$26,400/yr. w/ add-ons \$51,000 - \$60,400 for a three (3) year contract	360 Feedback Survey Admin., ED & debrief & coaching; Full board debrief = \$17,000.00 Optional add-ons: Interview 4 individuals and written summary = \$3,500.00 Custom survey creation = \$5,900.00



North Los Angeles County Regional Center Executive Director Evaluation

Proposal submitted to Megan Mitchell, NLACRC
Proposal submitted by John Gates, Avion Consulting

September 22, 2025

Engagement Context and Scope

We at Avion Consulting (Avion) are pleased that North Los Angeles County Regional Center (NLACRC) has expressed interest in potentially partnering with our firm in order to conduct a 360 assessment evaluation of your Executive Director. Here is our understanding of the scope of this engagement:

- Year 2 evaluation (in late 2026) and Year 3 evaluation (in late 2027) of Executive Director (ED)
- Evaluation to be based on goals, priorities, strategic plan, etc., related to assessment of ED's performance
- Numerous forms of data to be included in evaluation, many of which can be provided by NLACRC
- Evaluation also to include feedback gathered from key stakeholders via interviews and 360 survey
- Key stakeholders to include at least some board members, executive leadership team members, and others
- Evaluation to culminate in a single report for Year 2 evaluation, and a single report for Year 3 evaluation, both of which will provide an overall assessment of the performance and effectiveness of the ED
- It is proposed that each of the two evaluation reports include a debrief with the ED and a debrief with the board
- It is also proposed that each evaluation include a minimum of three follow-up coaching sessions to help the ED create and execute on an action plan based on the evaluation

The next page provides an overview of Avion's experience with this sort of work as well as a description of our typical approach to this sort of engagement.

Avion Experience and Approach

Avion was founded in January of 2014 by long-time colleagues John Gates and Steve Williams, each of whom previously spent roughly two decades with Leadership Research Institute. Since its founding, Avion has grown to 34 professionals, many of whom have master's and/or doctoral degrees from leading universities including Harvard, INSEAD, MIT, Stanford, USC, and numerous others. Avion has published three books in the area of leadership assessment and development and has served many leading organizations in that space. Our firm's business model is to tailor solutions to optimally meet clients' needs.

Avion has been involved in engagements like this one with countless organizations in both the public and private sector over many years, and our typical approach to this sort of engagement is as follows:

- Engagement kick-off meetings to ensure alignment on objectives and approach with all key stakeholders
- Relevant forms of data identified and plan for gathering data established
- Existing data provided by client to data, and new data gathering methods designed and developed
- Colleagues to provide feedback identified and notified of feedback-gathering process
- 360-degree feedback survey administered and/or feedback-gathering interviews conducted
- All feedback analyzed and evaluation report based on all data gathered written
- Leader (e.g., ED) provided with draft evaluation report and debriefed by lead Avion consultant
- Evaluation report revised if/as needed, then other key stakeholders (e.g., board members) provided with final report and debriefed by lead Avion consultant
- Lead Avion consultant works with leader (e.g., ED) on an action plan based on evaluation report and provides coaching to help leader execute on plan

Fees

- All services other than administration of online 360-degree survey based on daily rate of \$6,000 (and it is assumed that a minimum of four full days would be required for this engagement)
- Administration of online 360-degree survey using Avion's off-the-shelf 360 assessment is \$500
- Design of custom online 360-degree survey tailored to this engagement is estimated at \$4,000

Travel and expenses billed separately, at cost

John Gates Bio

John Gates is a Partner with Avion Consulting, a management consulting firm specializing in leadership, team, and organizational development. John has over 30 years of experience as a management consultant, and he is co-author of the 2017 book, “How Leaders Improve,” as well as the 2020 book, “The Five Coaching Conversations.”

John provides coaching and counsel to leaders from the middle management to senior executive levels; he partners with clients in the design and implementation of high-impact leadership development solutions; and he works with management teams on issues related to both team and organizational effectiveness. John also has extensive experience in the area of organizational assessment and follow-up and has helped numerous organizations achieve significant increases in leader credibility and employee engagement.

John has served clients in a wide range of industries, and in both the private and public sector. In addition, John has worked extensively in international organizations, spending considerable time over the last two decades serving clients in North America, Europe, and the Asia Pacific region. Beyond John’s extensive experience as a management consultant, he has also served in both faculty and staff positions at several universities, including California State University, Long Beach, and University of California, San Diego.

John holds a PhD from the University of Southern California, and his doctoral dissertation was a quantitative study in the area of leadership effectiveness.



Kinetic Flow

Response to Proposal:

North Los Angeles County Regional
Center

2025 Executive Director Review

June 2025



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Proposal Introduction

June 16, 2025

Lindsay Granger, Executive Administrative Assistant
On behalf of the Board of Trustees: Executive Director Review Workgroup
North Los Angeles County Regional Center
9200 Oakdale Avenue
Chatsworth, CA 91311

Dear Board of Trustees and the Executive Director Review Workgroup,

Kinetic Flow greatly appreciate the North Los Angeles County Regional Center's Board of Trustees providing Kinetic Flow with the opportunity to continue support of NLACRC's staff and communities. As you know, I greatly value the dedication of our system's volunteer Board members, their time and the impact they have representing and advocating for the 450,000+ Californians with developmental disabilities and their families.

It has been Kinetic Flow's honor and pleasure to dedicate the past 27 years to helping honor the needs of people served, and their families, while helping drive change and creating a more responsive, effective and accountable regional center system. Our work has included having supported seven (7) regional centers with Executive Director Review and Leadership Development projects, including utilizing best/promising practices in establishing meaningful outcome metrics and partnering with regional centers to support ongoing growth and development of the Executive Director and Leadership.

For regional centers Kinetic Flow has had the honor of partnering with on a consistent basis, we have been able to create meaningful - and measurable - differences for people served, staff, Board leadership, and in expanding the service responsiveness.



This difference was made possible by:

- Having a shared long-term vision with the Board, Staff and expert consultants all working synergistically with established internal processes to best be responsive to the needs of the regional center and the people they serve - to ensure all involved are working to honor the vision and mission of the regional center not just under the duration of the immediate project but in the long run to meet the mission and achieve the vision;
- Understanding the nuances of not just the regional center system but the specific culture, strengths, weaknesses and relationships of the specific regional center;
- Having time and resources to understand and integrate related regional center efforts (strategic plans, performance contracts, staff union contracts (where applicable)), regional center performance measures, staff performance reviews, departmental/inter-department/cross departmental communications, etc.);
- Being able to refine proven regional center system processes to best align and meet the unique diversity and equity efforts and challenges unique to that regional center; and
- Integrate existing regional center systems for optimal efficiency and minimized funding, which allows the regional center operationally (and the expert consultant by extension) to realize long term cost savings across a number of projects while achieving a greater impact and greater results.

Kinetic Flow is honored to provide North Los Angeles County Regional Center (NLACRC) with a response to NLACRC's Request for Proposals (RFP) on for the 2025 Executive Director Review/Evaluation Support. Information contained in this response is based on the limited information available from communications with the Board of Trustee's Executive Director Review Workgroup and the brief RFP.

Again, we thank you for the opportunity to support with the North Los Angeles County Regional Center and its communities.

Sincerely,


Ami Sullivan

**North Los Angeles County Regional Center:
Kinetic Flow RFP Response:
2025 Executive Director Review**



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Table of Contents

- I. Introductions and Qualifications
- II. Project Approach
- III. Cost Proposal
- IV. Additional Information:
 - A. Complete Qualifications
 - B. Executive Director Core Competency Samples

I. Introduction and Qualifications

- a. Summary of Capabilities and Qualifications
- b. Experience with Similar Projects
- c. Personnel Listing



I. Introduction and Qualifications

I.a. Introduction and Qualifications: Summary of Capabilities and Qualifications

Kinetic Flow's mission is to enhance the quality of quality of life services by inclusively quantifying the voice of the people served and other stakeholders. Kinetic Flow is comprised of a dynamic, experienced team of colleagues with more than 75 years of combined experience supporting California's regional center system. Our team is proud, and honored, to utilize our experience and expertise to best support North Los Angeles County Regional Center, its Board of Trustees, Leadership, staff and the many communities NLACRC supports.

Kinetic Flow is honored to have supported California's regional centers system for more than 25 years, providing Kinetic Flow with unique knowledge, expertise, experience, and insights. We proudly use this experience and gained knowledge to best support each unique regional center community organization and project.

Through the past 25+ years, Kinetic Flow's has developed a unique expertise in California's regional centers system and is therefore uniquely qualified to support North Los Angeles County Regional Center in many data-driven research and consulting niches, including Executive Director Review Process.

Kinetic Flow is honored to have:

- Supported Californians with developmental disabilities or at risk of developmental disabilities, and their families, and California's connected developmental disabilities service system for the past 25+ years, including having surveyed more than 95,000 Californians with developmental disabilities or with potential developmental disabilities, and their families, through a number of data collection methodologies and in a number of languages Utilizing person-centered data to drive outcomes and service/support development by partnering with regional centers to better understand and be responsive to the needs of people and their lived experienced.



- Supported engagement of regional center staff, based on surveys from more than 12,000 regional center staff:
 - Kinetic Flow has worked with a number of regional centers to conduct Employee Engagement and Satisfaction surveys and solicit employee feedback on key regional center issues. Kinetic Flow utilizes this data to guide and support organizations to maximize retention and optimize employee engagement
- Driven provider-regional center collaboration, utilizing experiences of more than 6,700 vendored staff;
- Worked with all 21 regional centers, the Department of Developmental Services, the State Council on Developmental Disabilities, Association of Regional Center Agencies, WestEd Center of Excellence, and other collaborative organizations, as well as consulted on Centers of Medicaid and Medicare Services System Change grants in six states.
- Provided training and facilitation to Chapman University's Alternative Communication course, California State University - Sacramento's Mover's Study interviewers, and University of California, Los Angeles, Nursing Center of Excellence on Utilization of Outcome Metrics.
- Supported regional centers and their communities through 120+ projects.
- Developed metric banks to support regional centers in assessing the impact of regional center services and supports for individuals and their families, regional center employees and providers, tying in best practices and insights inclusive of Person Centered Practices, Self-Determination, Leadership Core Competency Assessment and Development and utilizing mainstream business practices such as "Good to Great" and Stephen Covey's work.
- Tested numerous methodological approaches and has developed and utilized best practices targeted specifically for people served by the regional center system, and their families, regional center staff, regional center vendored service providers and collaborative community partners.



- Developed regional-center specific Core Competencies for Executive Directors and Leadership teams, implementing leadership development models with seven (7) regional centers.
- Supported organizations to utilize data and drive change by:
 - Highlighting Approaches to Optimization
 - Facilitating Teams to prioritize areas for development based on specific regional center needs, resources, existing initiatives, and environmental factors (community needs, external impacts, DDS directives and initiatives, Board of Trustee priorities, development of the Leadership, HR and Training Team)
 - Facilitating foundation building activities around the Values, Vision, Mission, and inter-team communication styles and team building
 - Facilitates What's Working/Not Working subject specific conversations to identify and support addressing root causes (vs. symptoms)
 - Providing one-on-one and group coaching, development, and training typically specific to the Leadership Team, Management/Supervisory Team
 - Founding and launching Employee cross-functional, multi-office, representation committees to help inform and drive change on an ongoing basis
 - Evaluation of internal communication, retention, training and HR tools (recruitment and hiring process, exit interview protocols, etc.) to help maximize existing efforts to increase retention.
- In addition, Kinetic Flow has provided extensive training for regional center staff, regional center Board of Directors, providers, and educational institutes in a variety of subjects.
- Participated in the development and evaluation of Oregon's Mental Health Self-Determined Pilot Project



Utilizing this strong foundation, Kinetic Flow additionally supports regional center operations, including:

- Leadership Evaluation and Development
- Diversity, Equity, Inclusion and Belonging Research and Implementation Support
- Team Development and Building
- Organizational Development Review and Planning for Optimizing Growth and Change

This research, and follow-up consulting, serves to bring the voices and lived experiences of Californians with developmental disabilities, and their families, regional center employees, and service providers to the forefront of data-driven decision making, enabling regional centers to focus improvement and development activities in ways that are most effective and impactful.

Utilizing these key voices and industry best/promising practices, Kinetic Flow has been key in guiding and supporting regional centers to truly engage with the people in they serve and those that support them- regional center Leadership and staff.

- Empowering Data-Driven Decision Making: Research and Consulting
 - Kinetic Flow is honored to connect with and represent the voices of: Individuals/Families, Board of Directors/Trustees, Employees, Service Providers, Community Collaborating Agencies, Advocacy and State Agencies
 - Kinetic Flow utilizes numerous outreach and connection methods, including but not limited to:
 - Listening Sessions, Focus Groups
 - One-on-One Interviews
 - Motivation/Behavioral Interviewing
 - Surveying Paper/Mail, Online, SMS/Text, Live Telephone
 - Video Interviewing (in development)



- Kinetic Flow turns person-centered data into actionable and impactful information to inform and guide organizations through stakeholder engagement, build individual/family satisfaction, increase employee retention and engagement, including raising morale, and building efficiencies to create a more impactful organization, becoming a true partner in helping organizations achieve their mission.
- Leadership and Staff Development
 - Training and Facilitation
 - Team-Building and Connectivity
 - Executive Director / Leadership Core Competency Evaluations
 - Performance Review Development and Training
- Organizational Development
 - DEIB Culture Review, Planning and Implementation Support
 - Staff Development and Training
 - Team Facilitation and Connectivity
 - Resource and Strategic Planning
 - Succession Planning
 - Process and Document Review
 - Cross-department Collaboration



I. Introduction and Qualifications

I.b. Introduction and Qualifications: Experience with Similar Projects

Kinetic Flow is honored to have supported regional center staff at seven (7) regional centers, across twenty-seven (27) Leadership Review Process projects including:

- Golden Gate Regional Center: 2023, 2022, 2021, 2020, 2019, 2018, 2017, 2006 Executive Director Review
- Valley Mountain Regional Center: 2023 Leadership Team Reviews
- Valley Mountain Regional Center: 2023, 2021 Executive Director Review
- Central Valley Regional Center: 2024, 2023, 2022 Executive Director Review
- San Gabriel/ Pomona Regional Center: 2005, 2012 – 2017 Executive Director Review
- San Gabriel/Pomona Regional Center: 2012, 2015, 2017 Management Team Reviews
- Regional Center of Orange County: 2017 Management Team Reviews
- Tri-Counties Regional Center: 2003 Executive Director Core Competency Modeling and Review Support
- Redwood Coast Regional Center: 2015 Executive Director Succession Planning: Executive Director Review

Attachment A: Please find complete Qualifications and Projects for Kinetic Flow.



I. Summary of Relevant Experience and Ability

I.c. Summary of Relevant Experience and Ability: Personnel Listing



Ami Sullivan, Founder of Kinetic Flow, has worked in the health and human services field providing independent research and consulting for more than 25 years.

Ms. Sullivan is honored to have worked with six states on Centers for Medicare and Medicaid Services grants and has had the pleasure of working with all 21 of California's regional centers in some capacity, as well as with the Department of Developmental Services, the Association of Regional Center Agencies, the State Council on Developmental Disabilities, among others.

Ms. Sullivan is the Project Lead and will coordinate with North Los Angeles County Regional Center



Lauren Black. Researcher. DEI Specialist. Researcher. Ms. Black is a Program director specializing in diversity, equity, and inclusion with a demonstrated history of working in the education management industry. Reliable and organized team player with the ability to communicate effectively and engage empathetically.

Ms. Black has collaborated with Ms. Sullivan for the past five years on a number of projects and provides expertise in Diversity, Equity, Inclusion and Belonging to Kinetic Flow projects ensuring project methodologies, analysis, and recommendations are promoting and reflecting DEI values. Further, Ms. Black works at a community level to gather community input through focus groups and interviews.



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Ms. Black will provide DEIB expertise and review of project aspects as is optimal within NLACRC's Scope of Work.



Ivy Turkington. Leadership Behavioral Change Consultant. Data and Systems Analyst. Ms. Turkington has worked with non-profits for more than 25 years with decades of experience helping large and small non-profits improve - from management consulting to internal leadership, including the Department of Developmental Services, regional centers, hospital systems, universities libraries, schools, and advocacy organizations. Ms. Turkington hold dual specialties in Data and Systems Analysis and Leadership Behavioral Change.

Data-wise, Ms. Turkington is in a unique position having research and built statistical models on California's CDER data, Self-Determination Cost Modeling and Quality Enhancement.

Within the realm of Leadership Behavioral Change, Ms. Turkington has coached executives, board, and staff on how to enhance performance of functions or staff to meet the organization's goals and supporting the organization to create a sustainable cycle of planning, implementing, and monitoring to ensure long-term success.

Ms. Turkington has been a collaborative part of the Kinetic Flow team since 2003 and will review organizational change recommendations from the Leadership Behavioral Change perspective.

II. Project Approach

- a. Scope of Services
- b. Methodology
- c. Strategies:
 - Respondent Engagement
 - Quality Assurance – Data Collection, Analysis
 - Confidentiality
 - Timeline
 - Communication Approach



II. Project Approach

II.a. Project Approach. Scope of Services

Per the draft Request for Proposal issued by North Los Angeles County Regional Center, the requested Scope of Work includes:

1. The following services are required of the selected consultancy:
 - a. Two (2) introductory collaboration meetings (that include a designated Board subcommittee as defined by the Board's bylaws) and the ED together to discuss the process steps, relevant process inputs, and the timeline overview to implement.
 - b. One (1) training for NLACRC's Board of Trustees and other stakeholders during a public board meeting (date to be determined) to outline clear expectations for all involved. This training and session would be recorded, with a recording available for the public and any absent Trustees.
 - c. Creation and/or use of the consultancy's evaluative survey and mechanism for confidential distribution and return of surveys.
2. At the conclusion of the survey distribution/submission process, the following published reports or information returns are required:
 - a. Consolidation of the results and summary with a point system identified.
 - b. One (1) debrief survey summary meeting with a designated Board subcommittee (as defined by the Board's bylaws) to review survey results.
 - c. Attendance at one (1) additional board meeting (during board closed session) to discuss the evaluation results and answer Trustee inquiries, for board approval of compensation recommendations.

For cohesiveness, these are separated into three categories by task:

- Communication, Understanding and Support: Training and Meetings (1b, 1c, 2c)
- Executive Director Review Data: Creation/use of evaluative system and consolidation of data (1a, 1c, 2a)
- Learnings and Development – (2a, 2b, 2c)



Kinetic Flow is fully versed in supporting each of the included items and have supported the outlined tasks through 27 regional center Leadership Development specific projects, and elements of each of the above through an additional 150+ regional center projects and 25+ years of dedicated service to the Lanterman Act and the people/families served under this system.

The following Project Approach: Methodology (III.b, c, D.) provides additional specific detail for achieving the Board of Trustees goals for the Executive Director Review as outlined above, and organized into the three sub-categories for the tasks:

- III.b.1: Methodology: Communication, Understanding and Support: Training and Meetings (1a, 1b, 1c, 2c)
- III.b.2: Methodology: Executive Director Review Data: Creation/use of evaluative system and consolidation of data (1a, 1c, 2a)
- III.b.3: Methodology: Learnings and Development – (2a, 2b, 2c)



II. Project Approach

II.b. Methodology

The proposed Methodology for NLACRC's Executive Director Review is considered a draft. The final methodology will be developed collaboratively by NLACRC's Board of Trustees: Executive Director Review Workgroup and Kinetic Flow to best meet NLACRC's information objectives, unique culture and the vision of the change and Leadership Development the regional center would like to create.

The Methodology section of this RFP response, outlines Kinetic Flow's Approach for the tasks outlined in the RFP (and referenced in the prior section) organized by task goal/orientation. This section includes:

- III.b.1: Methodology: Communication, Understanding and Support: Training and Meetings (1a, 1b, 1c, 2c)
- III.b.2: Methodology: Executive Director Review Data: Creation/use of evaluative system and consolidation of data (1a, 1c, 2a)
 - Review Process: Questionnaire Design and Development
 - Review Process: Data Collection Methodology
 - Review Process: Sampling Plan
 - Review Process: Data Analysis
 - Survey Process: Deliverables
- III.b.3: Methodology: Learnings and Development – (2a, 2b, 2c)

The below outlined Methodology reflects Kinetic Flow's current understanding of NLACRC's parameters and is based on industry standard best/promising practices and Kinetic Flow's 25+ years of working with California's regional centers.



II. Project Approach

II.b.1 Methodology - Communication, Understanding and Support: Training and Meetings (1a, 1b, 1c, 2c)

Working from a place of Common Understanding, Clear Communication, Collaboration and Transparency are Paramount!

Kinetic Flow applauds NLACRC for incorporating trainings and Board member involvement throughout this process. Kinetic Flow firmly believes that key to the success of any project or process is:

- Building common understandings
- Practicing active clear communication
- Creating a collaborative foundation
- Building trust and cohesiveness through transparency

The collaborative meetings and trainings outlined in NLACRC's RFP (items 1a, 1b, 1c, 2c) are key to ensuring the information and development goals of NLACRC are incorporated, as well as ensuring the Executive Director Review is designed, from the start, to achieve long-term leadership accountability, development and WIC compliance, as well as be a responsible stewardship of the trust the community places in the Board of Trustees.

For each meeting or training, Kinetic Flow will work to align with and support the Board's goals, including:

- Preparation of Agenda/Agenda Items
- Preparation of Support Materials – presentations, ED Review materials, etc.
- Follow-up and Response

Kinetic Flow will work to meet the timeline and availability needs of NLACRC. Throughout these trainings and meetings, Kinetic Flow works to achieve understanding by utilizing multiple mediums and aligning materials with the involved stakeholders. Additionally, Kinetic Flow is happy to support pre-



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meetings, as appropriate, for individuals that may desire or need additional time to review and process the materials in order to be active participants in these meetings/trainings.



II. Project Approach

II.b.2: Methodology: Executive Director Review Data: Creation/use of evaluative system and consolidation of data (1a, 1c, 2a)

A solid Executive Director Review starts with solid evaluation process that align to the Lanterman Act, and other legal oversight, the requirements of the Department of Developmental Services, the NLACRC Board of Trustees, and best practices of Leadership Development.

The North Los Angeles County Regional Center Board of Directors (Board) maintains, as one of its key responsibilities, the employment, oversight and evaluation of the Executive Director as well as putting into place a foundational succession plan for future use and Executive Director evaluation and coaching. Per California's Welfare and Institution Code (W&IC, 4622(j)(1), "The governing board shall review the performance of the director of the regional center." While the California Code of Corporations specifies, that a Board of Director's core responsibilities include their execution to "hire and evaluate the Executive Director" (CCC5213).

To best meet these legislative mandates, as well as optimize best practices in Leadership Development, Kinetic Flow recommends a hybrid

Objective Outcome/Compliance Metrics + Core Competency Model

The Objective Outcomes/Compliance Metrics will be determined by the Board Executive Director Review Workgroup, with guidance, as desired, from Kinetic Flow. Typically, Objective Outcomes/Compliance Metrics are included in Executive Director Reviews to assess the objective operational sufficiency of the Executive Director. Within the regional center system, these measures are typically tied to:

- DDS Performance Contract requirements
- Regional Center Strategic Plan performance
- Individual/Family Satisfaction Survey performance
- Regional Center Executive Director Contract



- DDS Special Contract Language

The exact metrics are typically guided by the regional center's Mission, Vision, Values, current contract parameters, areas of regional center emphasis, and the availability of data/measurements.

Within the process outlined by NLACRC, the determination of these measures would be discussed and defined in steps 1a and 1c, with data pulled for the report through 1c and 2a. Kinetic Flow will work to pull this data and seamlessly integrate the Objective Outcome / Compliance Metrics into the holistic Executive Director Review.

The Core Competency Models have evolved in the Human Resources/Talent Management field(s) as a key part of newer annual review processes as a sophisticated talent management insight model with increasing emphasis on development, goal setting, communication, job satisfaction and performance and contribution. A well designed and implemented model can become a strategic cornerstone of an integrated process which can:

- Clearly signal organizational priorities and values
- Act as a career and job development tool
- Focus the connection between competence and performance
- Assist an employee in managing their own career, development and job satisfaction
- Focus recruiting efforts
- Aid in succession planning and talent management
- Act as both an individual and organizational dynamic training needs analysis
- Provide the data to establish a dynamic statistical norm base of competence and track organization development
- Work to develop the tone and standards for all Leadership/Executive Management and unite the management team under a single set of expectations
- Help to focus development resources on high value returns in either a specific job or more broadly in the organization.



Competency elements are formatted into a user-friendly survey that can be completed by various stakeholders in a 360-process. A 360-degree evaluation process is a comprehensive performance review that honors for each stakeholders' unique relationship and perspective of the Executive Director. It supports the Board by providing for a dynamic multi-faceted review of the Executive Director's performance in multiple areas and in multiple functional areas. gathers feedback from multiple sources, including managers, peers, subordinates, and even external stakeholders. A 360-process provides a more holistic view of an Executive Director's performance than traditional evaluations that rely solely on a singular and therefore limited perspective.

In an effort to incorporate multi-stakeholder feedback in a systematic and meaningful way, some Boards have engaged in this Core Competency Review Survey. The Executive Director Core Competency Reviews survey:

- Provides a systematic way for employees, and community members, to provide meaningful information for the Board of Directors in their review process of the Executive Director while at the same time providing insightful, actionable feedback for the Executive Director;
- Provides a systematic way for members of the Board of Directors to provide meaningful information to the Executive Director on performance and professional development; and
- Serves to strengthen the regional center leadership in a systemic process.

The data and analysis gathered from Executive Director Core Competency Reviews survey:

- Assist in strategic planning;
- Identify strengths and areas for improvement for the agency and for the Executive Director;
- Provide a meaningful and systemic way of incorporating employee input into the Executive Director's review; and
- Provide an overall picture of the Executive Director's perceived performance for the Board of Directors and the Executive Director, as viewed by the Leadership Team, staff, people served, services providers, community members, and members of the Board of Directors;



- Provide insight for resource allocation, including training for the regional center and for individuals;
- Provide the Board of Directors and Executive Director a perspective of changes over time in the Executive Director's growth or changes within the organization over time; and
- Provide a meaningful and systemic way of incorporating employee input into management reviews.

As part of this Review process, Kinetic Flow will work with NLACRC to define and optimize:

- Review Design and Development
- Sampling Plan
- Data Collection Methodology

Core Competency: Review Design and Development

Start with the right tool(s)! ensuring the effort asks the right questions and connects with staff in the best ways - is the first paramount step in ensuring the success of NLACRC's Executive Director Review

KineticFlow will work with North Los Angeles County Regional Center to design and develop a review tool specific to their information objectives.

As both a legislative mandate, as well as a development and coaching tool for the Executive Director, the Board of Directors is interested in developing and utilizing an Executive Director Core Competency (360) tool to conduct the Executive Director Review to:

- Provide the Board of Directors with an objective assessment tool for reviewing the Executive Director's performance from multiple perspectives to both:
 - Comply with Lanterman Act regulations to conduct annual reviews of the Executive Director; and



- Provide the Board of Directors with a tool to assess potential adjustments to the Executive Director compensation package; and
- Provide the Executive Director with a coaching and development tool to strengthen the skill set and effectiveness of the Executive Director.

The Executive Director Core Competency Model/Evaluation tool flushes out the behaviors NLACRC's Executive Director would ideally demonstrate if he/she/they possessed and mastered that core competency.

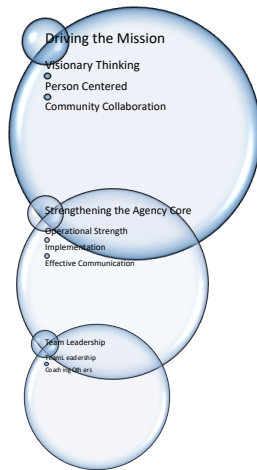
Each element from the Core Competency Model is flushed out with a clear descriptor that can then be assessed by individuals selected to be part of the 360 Review process.

Typically, the assessment scale used is a frequency scale. A frequency scale allows the survey participant to evaluate how often a specific trait or skill or behavior is demonstrated, rather than rating the performance of the Executive Director or their satisfaction with the Executive Director.

This scale is common in 360 and evaluation surveys as it helps maintain the organizational hierarchy and allows for greater insight. The frequency scale used in the more regional center Executive Director Core Competency Survey includes the below.



Typically, Core Competency Models for regional center leadership include elements of:



- Interpersonal Skills
- Person-Centered Thinking
- Diversity, Equity, Inclusion and Belonging
- Effective Communication
- Board Reporting and Support
- Community Collaboration
- Visionary Thinking
- Strategic Thinking and Planning
- Operational Strength and Implementation
- Team Leadership and Accountability
- Coaching Others

In addition, at the end of each core competency area, the review includes a space for participants to add any comments or thoughts on they wanted to convey regarding that core competency and the Executive Director.

Kinetic Flow can provide NLACRC's Workgroup with a full bank of Core Competency Metrics that have been used by regional centers as a place to start. Measures can be further customized to best fit NLACRC's culture and objectives. Additional metrics can be added as needed.



Core Competency: Review Sampling Plan

The second step in Review Process is identifying and developing a Sampling Plan. For the Executive Director Review, Kinetic Flow will work with the Workgroup to define all appropriate stakeholders that may have regular and informative interactions with the Executive Director.

The Executive Director position is multi-faceted and involves interaction with varied and diverse groups of people. For this evaluation of the ideal behaviors of the Executive Director, the North Los Angeles County Regional Center Board of Trustees may identify a select but diverse group of people to provide feedback on the core competency behaviors displayed by the Executive Director. These groups include

- Board of Trustees
- People served by the regional centers, families, possibly represented by the CAC, Support/Advocacy Groups, Family Resource Center, and others
- Staff, including Management Staff that may have more frequent or personal interactions with the Executive Director
- Service provider representation which may include the SPAC or VAC, and
- Members of the community, which often includes members of local CBOs, SCDD, and others.



Core Competency: Review Data Collection Methodology

With the right tool(s) developed as the first step of Review Process, the third step is ensuring effective, equitable data collection.

Data collection is the center and heart of any survey effort (or should be!). Considerations for data collection methodologies are numerous. Data collection methodology factors for North Los Angeles County Regional Center for the Executive Director Review may:

- Be built on the successes/lessons of prior efforts
- Insights offered by the Workgroup
- Be best suited to meet potential participants' technological preferences
- Ensure security and confidentiality
- Maximize participation
- Provide equitable participation

In order to best meet the community's needs and maximize cost-effectiveness, Kinetic Flow recommends a data collection process primarily focused on Online surveys, which would be available both in English and Spanish (as well as other threshold languages as needed for outlined participants).

In addition, Kinetic Flow would offer further support in the form of telephone interviews, paper survey or other for members of the Board of Trustees, and limited other potential participants for whom this data collection methodology presents a challenge or barrier. Other survey types could include:

- 1) SMS Survey
- 2) Mail/Paper Surveys
- 3) Telephone-paper surveys



Online surveying has the benefits of:

- Being passively available to respondents, so individuals can complete it
- anytime and at their own convenience;
- Is less intrusive and/or invasive, so respondents may feel greater ability to be completely honest;
- Ability to include participants without geographic limits;
- Utilizes a secure link for increased confidentiality and security;
- Has higher validity than many data collection methodologies; and
- Is cost effective.

Kinetic Flow initially recommends utilizing these methodologies to maximize respondent participation and maximize cost savings. Final recommendations would be developed based on the input and insights of the Workgroup.



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Core Competency: Review Data Analysis

Data Analysis is the fourth step in the Review Process and is a critical step in framing data-driven recommendations for creating cultural change.

Kinetic Flow will utilize a number of statistical and analytical tools when analyzing the Review data to ensure the data insights are maximized (get the most out of the data that we can), relevant and actionable to NLACRC.

Core Competency Data would be integrated with the Objective Outcome Measures to ensure a holistic and cohesive model of the Executive Director's performance is available for the Board of Trustees and the Executive Director.



II. Project Approach

II.b.3: Methodology: Learnings and Development – (2a, 2b, 2c)

While great thought, insights, expertise and experience will be invested in all logistical phases of data collection for NLACRC's Executive Director Review, data itself is only a tool. If that tool is not used, or not used intentionally, it, by itself, is not useful or helpful. Critical to accountability and Leadership Development, is the judicious use of the data. This is where Learning and Development consultation and engagement in honoring and using the data- the voices of people to truly drive change happens.

Per NLACRC RFP, this includes:

- a) Consolidate reporting
- b) Debrief with the committee or Workgroup
- c) Presentation to Board of Trustees

Kinetic Flow would recommend adding an additional item:

- d) Debrief with the Executive Director – this is key to supporting the development and learning of the Executive Director.

Kinetic Flow is proud to have enabled and supported many regional centers in using data to support and transform organizations



II. Project Approach

II.c. Project Approach. Strategies.

Project Approach: Strategies: Respondent Engagement

- 1) Kinetic Flow will work with the Workgroup to ensure messaging is data collection methods are equitable and encourage participation.
- 2) In addition, Kinetic Flow will work to make alternative data collection methodologies available to support participant engagement.

During the data collection process, Kinetic Flow will provide data collection updates, and be able to provide mid-process retargeting or specific outreach efforts for groups that may not be responding ideally to the effort to ensure equitable access and opportunity.

Project Approach: Strategies: Quality Assurance- Data Collection and Analysis Tasks

At Kinetic Flow Corp, we understand the critical role data plays in informing sound decisions and driving informed strategies. That's why we prioritize rigorous Quality Assurance (QA) practices throughout our data management, data collection and analysis processes, specifically for data collected via SMS/text, online, and live telephone interviews and the sample data (personal information) connected with data collection.

A Conservative Approach for Maximum Reliability: While embracing innovation we believe in the value of established best practices. Our QA framework adheres to conventional methodologies ensuring consistency and reliability in data acquisition and interpretation. This conservative approach minimizes the risk of errors and biases, fostering trust in the insights we generate.

A full outline of the QA Lifecycle for Data Collection by Kinetic Flow is available upon request.



Project Approach: Strategies: Confidentiality

Data Security. As a regional center vendor, Kinetic Flow has provided sample, data cleaning and validation services, in compliance with HIPAA requirements, on more than thirty projects for DDS, regional centers, and regional center vendored service providers, as well as for other States and private industry clients. As a data-based research firm, one of Kinetic Flow's core principles is strict and conservative information management standards— both prior to and since HIPAA regulations. As a contractor, Kinetic Flow considers itself bound by the same laws, rules, regulations and courtesies extended to potential survey respondents as the agency we contract with. Further, one of the first tenants of respondent-based research is respecting and maintaining respondent confidentiality. Kinetic Flow maintains strict sample and data management standards, including adherence to HIPAA regulations and any state regulations regarding use of such data.

Respondent Confidentiality. No information or documents gathered or used in this or any study will be released or published by Kinetic Flow. All interviewing involves the expressed or implied promise of confidentiality and anonymity for the respondent and the respondent's individual answers. The specific identity of individual respondents, including names, addresses, telephone numbers, e-mail addresses, and fax numbers is confidential and protected information. Kinetic Flow does not disclose this information to clients or to anyone outside of our company who is not part of our confidentiality system. Further, Kinetic Flow works to actively protect respondent identity by anonymizing responses to open-ended data and limiting the drill down ability within the data set.

Project Approach: Strategies: Timeline

Kinetic Flow will work with NLACRC to design a timeline that meets desired milestones to be the best of the project's ability. Please note, cultural shifts take time. Kinetic Flow is committed to remaining available to NLACRC's not only throughout the process but for period check-ins and review, as well as guidance beyond the timeline scope of the RFP.



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Project Approach: Strategies: Communication Approach

Kinetic Flow is proud to present to North Los Angeles County Regional Center the support of a stable, engaged project team with more than 25 years of individual experience and more than 75 years of combine experience supporting California's regional center system. In order to remain optimally responsive to the individual needs of each regional center, as well as cost efficient, Kinetic Flow operates with a small core of staff, and contracts with specific specialized consultants to best meet the needs of the project and bringing core expertise to each project.

To maintain project efficiency, engaged and clear communication and overall project cohesiveness, each client liaison's with one core Project Manager. For North Los Angeles County Regional Center's Executive Director Review Process, the Project Manager will be Ami Sullivan. Ms. Sullivan has an existing relationship with NLACRC's Board of Trustees and regional center staff, as well as the operating preferences of the NLACRC to ensure a smooth, knowledgeable approach. Additionally, Ms. Sullivan has vast experience in this area, and as the founder of Kinetic Flow, project continuity is assured.

III. Cost Proposal





III. Cost Proposal

Kinetic Flow has based the initial costs on the Approaches and Scope of Services laid out in this Response. Costs can be revised based on final methodological considerations to best meet NLACRC's needs. Kinetic Flow will work with NLACRC to realize all potential cost-savings, as has been done in the past. Additionally, Kinetic Flow only invoices for work and direct expenses incurred; NLACRC will never be billed for services not rendered.

The cost proposal is broken down by year for the three-year contract, assuming the Scope of Work remains consistent after initial development of the Executive Director Review Model:

Activities	Investment
Year 1: Executive Director Review Model Creation, Collaboration and Training, Review Process (Data Collection/Coordination), Reporting, Debrief	\$ 9,840.00
Year 2: Executive Director Review Model Revisions (as needed), Collaboration and Training, Review Process (Data Collection/Coordination), Reporting, Debrief	\$ 4,890.00
Year 3: Executive Director Review Model Revisions (as needed), Collaboration and Training, Review Process (Data Collection/Coordination), Reporting, Debrief	\$ 4,890.00
Total Investment for 3 Years	\$ 19,620.00



Budget Notes:

- 1) Total Cost is provided as a maximum cost, no additional costs will be billed unless NLACRC changes the Scope of Work. If a change to the Scope of Work is made, Kinetic Flow will provide written notification and a written revised cost; work will not proceed until changes are approved, in writing by NLACRC.
- 2) All methodologies are initial until finalized by NLACRC, which may result in changes project investment.
- 4) Invoices will be noted appropriately with only the utilized funding billed and an accounting provided on the invoice.
- 5) *Kinetic Flow only bills for utilized expenses; any billable hours or direct expenses not used will not be billed.*
- 6) When possible and advantageous to NLACRC, Kinetic Flow will utilize existing events and build off of existing regional center projects and processes to realize cost-savings.
- 7) Meetings/Trainings are calculated as remote attendance; in-person can be added at cost, or, when possible, combined with other events to minimize costs but maximize in-person connections.
- 8) Year 1 costs are significantly higher due to collaboration on and creation of the Evaluation Model, including Objective Outcome Measures and Core Competency Review. If the design/creation requires fewer hours; these hours will not be billed. Year 1 also includes development of report and presentation templates custom to NLACRC and its' communities. Year 2/3 include learnings and minor revisions, but creation/development investment is not necessary.



IV. Additional Information. A: Complete Qualifications





OVERVIEW

For more than 25 years, Kinetic Flow has been honored to support people engaged in human services systems, with specific focus on supporting the needs of Californians with developmental disabilities, and their families, and the Developmental Disabilities Services system, including regional centers, their staff, service providers, and community collaborators.

Kinetic Flow's mission is to *enhance the quality of quality of life services* by quantifying the voice of the people served and other stakeholders for use in Service and Quality Enhancement/Improved Effectiveness & Efficiency by Empowering Data-Driven Decision Making:

Organizational Development
Leadership and Staff Development
Business Development
Research

Kinetic Flow is honored to have:

- Partnered with more than 50 non-profit organizations serving individuals in the fields of: developmental disabilities, mental health/substance abuse/behavioral needs, disadvantaged youth, and homelessness
- Worked with all 21 regional centers, the Department of Developmental Services, the State Council on Developmental Disabilities, Association of Regional Center Agencies, WestEd Center of Excellence, and other collaborative organizations, as well as consulted on Centers of Medicaid and Medicare Services System Change grants in six states.
- Supported regional centers and their communities through 170+ projects.
- Listened to the voices of more than 95,000 Californians with developmental disabilities through a number of formal data collection methodologies;
- Supported the development of 11 regional center Board of Directors/Trustees
- Supported the evaluation and development of 7 Executive Directors, as well as a number of Leadership Teams
- Surveyed more than 12,000 regional center staff;
- Surveyed more than 6,700 vendored regional center staff;
- Participated in the development and evaluation of Oregon's Mental Health Self-Determined Pilot Project
- Has secured more than \$20 million in grant funding for mental health, victims of abuse, and developmental disabilities.



CORE COMPETENCIES

Empowering Data-Driven Decision Making: Leadership and Staff Development ~
Research and Evaluation ~ Organizational Development ~ Business Development

Kinetic Flow is proud to provide a number of core services and supports to our clients

- Empowering Data-Driven Decision Making: Research and Evaluation
 - Kinetic Flow is honored to connect with and represent the voices of: Individuals/Families, Board of Directors/Trustees, Employees, Service Providers, Community Collaborating Agencies, Advocacy and State Agencies
 - Kinetic Flow utilizes a number of outreach and data collection methods, including but not limited to:
 - Listening Sessions, Focus Groups
 - One-on-One Interviews
 - Motivation/Behavioral Interviewing
 - Paper/Mail Surveying
 - Online Surveying
 - SMS/Text Surveying
 - Telephone, Live Interviewing
 - Video Interviewing (*in development*)
- Leadership and Staff Development
 - Executive Director Core Competency Evaluations
 - Management Staff Core Competency Evaluation
 - Performance Review Development and Training
 - Board of Director Training, Coaching and Development
 - Facilitation and Training
 - Team-Building and Team Development
- Organizational Development
 - Strategic Planning
 - Succession Planning
 - Process Review Project Management
 - Cross-department Collaboration
- Business Development
 - Grant Writing and Grant Management



- Empowering Data-Driven Decision Making: Research and Evaluation.

Since 2003 Kinetic Flow has been at the forefront of introducing the use of Social Research - using the voice of people served and families to drive services and service change - to non-typical social systems, primarily California's Regional Center System, spearheading quality, efficiency and effectiveness studies, as well as conducting research into needs assessment trends to anticipate and meet the needs of the Baby Boomer, GenX, Xennials, and Millennial generations.

Through the use of online survey platforms, mobile device platforms (SMS, Text), live telephone interviews, mail and paper surveys, as well as utilization of qualitative interviews, panels, focus groups, listening sessions, and focused research, Ms. Sullivan has amassed vast experience utilizing sound research techniques to focus data driven thinking to:

- Drive strategic planning,
- Focus process improvement,
- Identify and capitalize on best/promising practices,
- Identify areas for development for quality assurance/ improvement models, and
- Drive measurable improvements in quality of life, effectiveness and efficiency.

Kinetic Flow has specialized in the Health and Human Services field, specifically in California's developmental disabilities system for the past 20+ years. Through this work, Kinetic Flow has led numerous projects listening to the voices of people with developmental disabilities and their families, as well as vital stakeholders including:

- Conducted over 95,000 interviews of people receiving services from human service organizations;
- Conducted interviews and surveys with more than 12,000 with direct care staff and case managers; and
- Conducted interviews and surveys with more than 6,700 service providers in the field.

*An extensive list of projects can be found in the Appendix.



Leadership and Staff Development. Supporting overall organizational development, Kinetic Flow provides staff development, succession planning, core competency management reviews and evaluation, 360 management processes and training services, as well as development and training of Board of Directors. Kinetic Flow has provided consulting services to California's private non-profit Regional Center System as well as state agencies in Oregon, Arkansas, California, Louisiana, Nevada, and Washington D.C. Further, Kinetic Flow advises clients on intentional managed growth, leadership and organizational cohesiveness to maximize organizational effectiveness, efficiency and longevity.

- Organizational Development. Kinetic Flow guides and supports agencies with organizational development, including, with strategic planning, consensus building, review of organizational structures, function, process and department alignment, meeting and retreat facilitation, training in areas of core competency, including Board of Directors development training, and timeline and resource planning.

In addition, as part of the overall Organizational Development assistance, Kinetic Flow provides marketing, outreach and transparency assistance in creating marketing materials, writing and/or editing reports and communications (press releases, Executive Director Communications, newsletter articles, blogs, etc.).

Specific to strategic planning, Kinetic Flow works with organizations to facilitate a multi-dimensional planning processes that incorporates external stakeholder feedback with internal feedback and hard metrics. Experience includes data gathering, goal setting, and facilitated consensus building. Kinetic Flow has provided Organizational Development services on numerous projects throughout Oregon and California, as well as in additional states.



- **Business Development.** Kinetic Flow has written more than 50 grants to solicit funding for new programs and expansion programs achieving awards of over \$20 million for clients. Fifteen of the grant responses were written to government agencies, both state and federal. Kinetic Flow successfully saw these proposals through the government contracting process. Kinetic Flow is experienced in all facets of grant / proposal writing, including submission of Concept Papers and Abstract Submissions, Budget Development, Writing and Editing, Review of Grant Submissions, and Proposal Management and Coordination. Kinetic Flow has experience both working individually to develop, write and submit grant responses, as well as coordinating and managing up to fifteen partners or stakeholders on grant proposals. In 2009-10, the only year in which Kinetic Flow applied for this status, Kinetic Flow, was awarded status as an approved Grant Writing Partner for the Council on Quality and Leadership.

Additionally, Kinetic Flow has authored numerous proposals, achieving awards of more than \$12 million for clients, as well as having authored 200+ proposals, achieving awards of more than \$14 million, with additional projects still pending. Kinetic Flow develops the proposal, including researching and analyzing funding organizations, explores alternative resources creating Business Plans, and provides action plans and recommendations.



APPENDIX: RELEVANT PROJECT LIST

A partial list of project includes:

- Alta California Regional Center
 - 2019 Board of Directors Training: Succession Planning, Strategic Planning and Teambuilding
 - 2002-03 Consumer Satisfaction Study
 - 2002-03 Service Provider Satisfaction Study
- Arkansas' Department of Developmental Services
 - 2003 Oregon Technical Assistance Corporation (OTAC) Consultant: 2002 Centers for Medicare and Medicaid Services (CMS) Real Choice Systems Change Grant Funding Proposal: Arkansas One-Stop
 - 2003-07 Oregon Technical Assistance Corporation (OTAC) Consultant: 2002 Centers for Medicare and Medicaid Services (CMS) Real Choice Systems Change Grant Implementation Team
 - 2003 Division of Developmental Disabilities: Community Integration Personal Assistance Services and Supports (PASS) to Explore New Service Delivery Models (Goal Three) Funding Proposal
- California State Council on Developmental Disabilities
 - 2002-05 State Council on Developmental Disabilities, Area Boards on Developmental Services Merger Environmental Scan
- California State University Sacramento, Dept. of Applied Research
 - 2008 California Department of Developmental Services' Movers Study, Survey Instrument Adaptations and Interviewer Training
- Central Valley Opportunity Center:
 - 2018 Strategic Planning (in partnership with Pathways Facilitation, et. al)
- Central Valley Regional Center
 - 2024 Executive Director Review
 - 2023 Executive Director Review
 - 2022 Executive Director Review
- Chapman University
 - 2001 AAC Technologies, Quality of Life Studies



- CHANCE, Inc.
 - 2011 Client Management Database Solutions
 - 2009 Start-up Grant Funding Proposal to Bank of America
 - 2009 Client Satisfaction Evaluation
 - 2008 Roommate Matching Funding Proposal to State Council on Developmental Disabilities
 - 2008 Client Satisfaction Evaluation
 - 2006 Housing Needs Assessment
- Committee on Sexuality for People with Developmental Disabilities
 - 1999 Strategic Planning Retreat and Facilitation
- Community Options, Inc.
 - 2005 Family Home Agency Service Delivery Review
 - 2003 Family Home Agency Service Delivery Review
- Competitive Insights
 - 1993-2003 Confidential Competitive Data Analysis for Market Strategies and Proposals
- Darkness to Light
 - 2003 Consulting: Stewards of Children Child Sexual Abuse Prevention Initiative Funding Proposal
- Disability Navigators, Inc.
 - Disability Compass Funding Proposal to North West Healthcare Foundation
 - Disability Compass Funding Proposal to Meyers Foundation
- District of Columbia, Health and Human Services (Medical Assistance Administration)
 - 2005-06 Consumer-Directed Services Program Pilot
 - 2004-05 Consultant: Management of a Consumer Directed Program for Persons with Developmental Disabilities Funding Proposal
- Eastern Los Angeles Regional Center:
 - 2023 - 2025 Data-Community Support
 - 2023 Mental Health Specialist Pilot – Program Evaluation
 - 2023 Self-Determination Enhanced Caseloads Pilot -Program Evaluation
 - 2023 Program Evaluation Data Support and Consulting
- Empowerment Initiatives, Inc.
 - S.P.I.R.I.T. – Mental Health Service Provider Individualized Recovery Intensive Training: Evaluation Report



- Family Housing Corp.
 - 2005 Community Placement Plan Funding Proposal to Eastern Los Angeles Regional Center
- Golden Gate Regional Center
 - 2025 DEIB Committee Support
 - 2025 Annual New Service Needs Survey
 - 2025 LACC Post Individual and Family Survey
 - 2024 GGRC New Logo Poll
 - 2024 Annual New Service Needs Survey
 - 2024 Executive Director Review
 - 2024 Employee Engagement and Satisfaction Survey / Organizational Change Project
 - 2023 Language and Cultural Description Survey (LACC Plan)
 - 2023 Employee Engagement and Satisfaction Organizational Change
 - 2023 Executive Director Review
 - 2023 Employee Engagement and Satisfaction Survey
 - 2022 Executive Director Review
 - 2022 Service Needs Survey
 - 2022 Unmet Needs Assessment
 - 2021 Strategic Plan Review and Facilitation
 - 2021 Executive Director Review
 - 2021 Unmet Needs Assessment
 - 2020 Employee Engagement and Satisfaction Study
 - 2020 Unmet Service Needs Community & Stakeholder Survey
 - 2020 Executive Director Review
 - 2019 Executive Director Survey
 - 2019-20 Reducing POS Disparity through Person Centered Training Grant Initiative – Data Collection/Consulting Support
 - 2018 Executive Director Review Survey
 - 2018 Employee Satisfaction Survey
 - 2017 Executive Director Review Survey
 - 2017 Strategic Planning Facilitation and Plan Production
 - 2017 Advisory Committee of Employees – Facilitator
 - 2016 Employee Satisfaction Survey
 - 2010-11 Legislative Analysis: Proposal for a Consolidated Quality Management System (with Turkington Ruhl Consulting)
 - 2010 Quality Management Redesign Consultants Retreat
 - 2006 Employment Services Survey
 - 2006 Autism Services Survey



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- 2006 Executive Director 360 (with RJSwarr Consulting)
 - 2006-2007 Bay Area Quality Management System: National Core Indicators Data Collection
 - 2003-2005 Bay Area Quality Management System: National Core Indicators Data Collection
- Harbor Regional Center
 - 2015-16 Client Services and Accessibility Survey (Disparity Grant Initiative)
- Human Services Research Institute
 - 2003 Consulting: Nevada Funding Request to Centers for Medicare and Medicaid Service (CMS) Money Follows the Person Rebalancing Initiative
- J.D. Power and Associates (partial list):
 - 1999 Medstat Quality Catalyst: Managed Care Plan Report
 - 1999 Proprietary Neutra-Pharmaceutical Retailer Study
 - 1999 Internet Healthcare Information Study
 - 1998 Medstat Quality Catalyst: Managed Care Plan Report
 - 1998 Proprietary Allergy Medication Study
 - (2) Luxury Department Store Customer and Employee Satisfaction Studies (Monthly/Annually)
- Louisiana Department of Health and Hospitals
 - 2005-07 Rebalancing Initiative
- Del Norte Mission Possible
 - 2021-24 Strategic Planning Process/Strategic Plan
- North Bay Regional Center
 - 2024 – 25 Strategic Plan Implementation Support
 - 2022-23 Strategic Planning
 - 2021 COVID-19 Pandemic Check-In Surveys (Consumer/Family, Provider, Staff)
 - 2017 Client Services and Accessibility Survey (Disparity Grant Initiative)
 - 2017 Succession Planning
 - 2016 Board of Directors Training: Succession Planning and Strategic Planning
- North Los Angeles Regional Center
 - 2023 Individual and Family Satisfaction Survey
 - 2022 Strategic Planning Process
 - 2002-03 Individuals Community to Work Transportation Assessment
- Options CCNBC
 - 2004-05 Traumatic Brain Injury (TBI) Funding Proposal



- Oregon Technical Assistance Corp.
 - 2005 Consulting: Oregon Technical Assistance Corporation Training and Technical Assistance Individual Support Plan and Person Centered Planning Competitive Services Proposal
 - 2005 Oregon Technical Assistance Corporation Direct Care Staff on the Oregon Intervention System (OIS) Competitive Services Proposal
 - 2005 Oregon Technical Assistance Corporation Crisis Services Competitive Services Proposal
 - 2005 COMPASS
 - 2004-2005 California Department of Developmental Services: CADDIS Software Review and Analysis
 - 2004-05 Robert Wood Johnson Funding Proposal: Better Jobs Better Care in Nursing Implementation and Evaluation
 - 2004, Consultant: State of California Department of Developmental Services Independent Plus Waiver Services Training and Implementation
 - 2004 Consultant: Arizona Fiscal Intermediary Funding Proposal
 - 2003 Robert Wood Johnson Funding Proposal: Better Jobs Better Care in Nursing Funding Proposal
 - 2003 Empowerment Initiative Brokerage Funding Proposal
 - 2003, Consultant: The State of Hawaii, Development Disabilities Division
 - Community Integration Personal Assistance Services and Supports (PASS) for Project Implementation
 - 2003, Consultant: The State of Ohio, Department of Mental Retardation and Developmental Disabilities
 - Self-Determination in a Medicaid Environment
 - 2002 State of Oregon Mental Health and Addiction Services: Mental Health Pilot Brokerage Competitive Services Proposal
- Oregon Empowerment Initiative
 - 2003-05 Mental Health Brokerage Pilot Effectiveness Survey
- Purchase of Services Variance Statistical Modeling Paper, 2004
- Quality of Life Connections
 - 2006-10 Consulting: Funding Strategies and Grant Proposals
- R & D Transportation Services, Inc.
 - 2004 Golden Gate Regional Center Transportation Services Audit
 - 2001-02 Tri-Counties Regional Center Transportation Services Evaluation
 - 2000-01 Tri-Counties Regional Center Transportation Services Evaluation



- Redwood Coast Regional Center
 - 2025 Board of Directors Training: Board of Directors Roles and Responsibilities
 - 2024 Board of Directors Training: Board of Directors Roles and Responsibilities
 - 2023 Board of Directors Training: Board of Directors Roles and Responsibilities
 - 2022 Board of Directors Training: Board of Directors Roles and Responsibilities
 - 2021 Board of Directors Trainings: Recruitment, Board of Directors Roles and Responsibilities
 - 2017 Management Team Performance Appraisal Training
 - 2015 Executive Director Review Model/ Executive Director Review
 - 2015 Board of Directors Succession Planning Support
 - 2014 2015-19 Strategic Planning Facilitation (Limited Scope)
 - 2014 Service Provider Billing Survey
 - 2012 Satisfaction Surveys: Consumer, Employee, Provider
 - 2010-11 Consumer Satisfaction Survey
 - 2010-11 Employee Satisfaction Survey
 - 2006 Consumer Satisfaction Survey
 - 2006 Service Provider Satisfaction Survey
 - 2006 Employee Satisfaction Survey
- Regional Center of the East Bay
- Regional Center of Orange County
 - 2017 Board of Directors' Executive Director/Management Team Evaluation
- Robert Wood Johnson Foundation/ Oregon Works
- San Andreas Regional Center
 - 2001-02 Residential Service Provider Satisfaction Study
- San Diego Regional Center
 - 2025 Employee Engagement and Satisfaction Survey / Management Team Planning Facilitation
 - 2023 Language and Cultural Communications Plan Support (Staff Survey, Individual and Family Survey – pending)
 - 2022 Employee Satisfaction Survey / Management Team Planning Facilitation
 - 2018 Employee Satisfaction Survey / Management Team Planning Facilitation
 - 2015 Employee Satisfaction Survey / Management Team Planning Facilitation
 - 2011 Employee Satisfaction Survey



- San Gabriel/Pomona Regional Center
 - 2017 Executive Director Review Survey
 - 2017 Management Team Review Survey
 - 2016 Executive Director Review Survey
 - 2015 Executive Review Survey
 - 2015 Management Team Review Survey
 - 2013 Executive Director Review Survey
 - 2012 Board of Directors Training: Executive Director's Role and Performance
 - 2012 Executive Director Review Survey
 - 2010 Efficiency Survey
 - 2010 Employee Satisfaction Survey
 - 2010 Service Provider Satisfaction Survey
 - 2007 Client Satisfaction Survey
 - 2007 Client Intake Satisfaction Survey
 - 2007 Service Provider Satisfaction Survey
 - 2005 Satisfaction Survey Process Redesign
 - 2005 Satisfaction Survey Process Review
 - 2005 Director 360 Evaluation (with RJ Swarr Consulting)
- Scripps Chula Vista Emergency Room Physicians Group
 - 2011 Employee Recognition Survey
 - 2007 Employee Recognition Survey
 - 2006 Employee Recognition Survey
- Self-Determination Statistical Cost Modeling, 2002
- Shape-UpUS
 - 2009 Consulting: Funding Strategies and Grants
- Samoan Community Developmental Center
 - 2022-23 Strategic Plan Support
- Tri-Counties Regional Center
 - 2025 Individual and Family Satisfaction Survey
 - 2025 Organizational Development Plan for Supporting Growth and Change: Support and Implementation
 - 2025 LACC: Linguistic and Cultural Description: Individual and Family Survey (Y3)
 - 2024 LACC: Linguistic and Cultural Description: Individual and Family Longitudinal Survey (Y2)
 - 2024 Individual and Family Satisfaction Survey
 - 2024 POS Authorization Review Support



- 2024 Organizational Development Plan for Supporting Growth and Change: Support and Implementation
- 2023 Services and Supports Survey
- 2023 Service Provider Study
- 2023 Organizational Development Support Activities
- 2021-23 Scientific Data Exploration: Diagnostic Profiles and BI Interface
- 2022-23 Linguistic and Cultural Communications Plan: Linguistic/Cultural Description
- 2022 Services and Supports Survey
- 2021 Services and Supports Survey
- 2021 Strategic Planning Support Surveys
- 2020 Services and Supports Survey
- 2019 Services and Supports Survey
- 2018 Human Resources: Grievance Investigation Assistance
- 2018 Services and Supports Survey
- 2017 Services and Supports Survey
- 2017 Strategic Planning Support
- 2016 Services and Supports Survey
- 2016 Staff Analysis Support
- 2015 Services and Supports Survey
- 2014 Services and Supports Survey
- 2013 Services and Supports Survey
- 2013 Autism Services Utilization and Efficacy Study
- 2012 Services and Supports Survey
- FY2010-11 Services and Supports Survey
- FY2010-11 Autism Services Survey
- 2009-11 Person Centered Thinking Funding Grants
- 2009-11 Employment Initiative Funding Grants
- FY2009-10 Services and Supports Survey
- FY2008-09 Services and Supports Survey
- FY2007-08 Autism Services Survey
- 2006 Services and Supports Survey
- 2005 Consumer Satisfaction Study
- 2004 Employee Satisfaction Survey
- 2003-04 Consumer Satisfaction Survey
- 2003 Executive Director 360 (with RJ Swarr Consulting)
- 2002-03 Consumer Satisfaction Survey
- 2002 Employee Satisfaction Survey



- 2002 Department of Developmental Services Early Start Program: Family Satisfaction Study – 21 Regional Centers
- 2002 Department of Developmental Service: Performance Contract Pilot Project: Consumer and Service Provider Satisfaction Surveys – 6 regional centers
- 2001-02 Consumer Satisfaction Study: Service Coordination and Individual Program Plan Evaluation
- 2001-02 Consumer Satisfaction / Quality of Life Study: Residential Facilities
- 2000-01 Consumer Satisfaction /Quality of Life Study: Intake, Early Intervention, Service Coordination and Supported Living Services (with Center for Outcome Analysis)
- 1999-2000 Consumer Satisfaction Study: Service Coordination
- 1998-99 Consumer Satisfaction Study: Independent Living Services
- Valley Mountain Regional Center
 - 2023-24 Strategic Planning Support
 - 2023 Director Review Evaluation Support
 - 2023 Strategic Plan: Outcome Satisfaction Surveys: Individuals/Families, Staff, Service Providers
 - 2022 Strategic Planning Support
 - 2022 Executive Director Review
 - 2020 Strategic Planning Facilitation / Strategic Plan
 - 2020 COVID-19 Check-In Surveys
 - 2020 Strategic Plan Outcomes Follow-up: Satisfaction and Planning Surveys: Employee, Consumer, Service Provider
 - 2018 Planning Meeting Facilitation
 - 2017 Strategic Plan Outcomes Follow-up: Satisfaction Surveys: Employee, Consumer, Service Provider
 - 2016 Succession Planning (in partnership with Pathways Facilitation, Anh Nguyen)
 - 2014 Strategic Plan Outcomes Follow-up: Satisfaction Surveys: Employee, Consumer, Service Provider
 - 2013 Strategic Planning (in partnership with Pathways Facilitation, Anh Nguyen)
 - 2004 Day Program Assessment



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- Westside Regional Center
 - 2025 LACC: Linguistic and Cultural Description: Individual and Family Longitudinal Survey (Post)
 - 2022-23 Linguistic and Cultural Communications Plan Support (Listening Session Support, POS Data Exploration, Individual/Family Survey, Service Coordinator Survey, Unmet Needs Assessment)
 - 2021 California First Five, Help Me Grow: Year 2 Support, Data Consultation and Analysis
 - 2020 California First Five, Help Me Grow: Removing Barriers to Service Assessment
 - 2017 Client Services Accessibility & Satisfaction Survey (Disparity Grant Initiative)

In addition, Kinetic Flow has provided extensive training for regional center staff, regional center Board of Directors, providers, and educational institutes in a variety of subjects.



PUBLICATIONS AND PRESENTATIONS

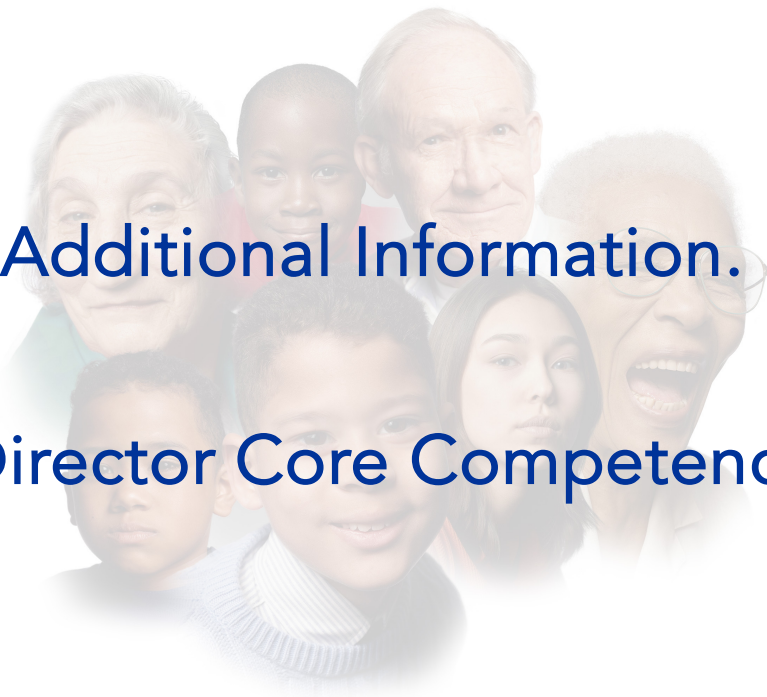
Kinetic Flow's staff has had the honor of consulting on a number of projects, presenting to state and national audiences and has a number of publications. Below, please find a partial list of publications and state/national presentations; please note, client-specific presentations and paid training presentations are not listed.

- Sullivan, Ami, Turkington, Ivy, and Namnath, Dominic, *Utilization of CDER Data to Empower Better Decision Making*, 2023
- Sullivan, Ami, Turkington, Ivy, and Ruhl, John, Ph.D., *Developing an Enhanced Quality Management System for Californians with Developmental Disabilities: Consolidation for Comprehensive Efficiency and Effectiveness*, 2011:
- Sullivan, Ami and Turkington, Ivy, *A Quality Assurance System for the Human Services: Tri-Counties Regional Center – A Case Study*, January 2003
- Sullivan, Ami and Turkington, Ivy, *Self-Determination Preliminary Budget Setting Cost-Center Analysis and Prospective Budgeting Model*, November 2002
- Sullivan, Ami, *Program Evaluation: When, How, Why, and Oops!* University of Southern California, Department of Occupational Therapy, November 2002
- Sullivan, Ami, and Turkington, Ivy, *Satisfaction in Context Part II: A Case Study of Consumer/Family Satisfaction Surveys*. (Pending Publication in American Association on Mental Retardation Peer Review Journal), July 2002
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IV. Additional Information. B:

Executive Director Core Competency Samples

Please note: Work samples are being provided to NLACRC's Board of Trustees as an example only. All work samples are the property of Kinetic Flow, or specific clients thereof and are being provided as reference only. Work cannot be duplicated or utilized without express written authorization of Kinetic Flow and the associated specific client.



2024 GGRC Executive Director Review Survey

Welcome! We need your input!

It's that time of year again! Time for the Board of Directors' required assessment of Golden Gate Regional Center's Executive Director Eric Zigman, and your time and insights are critical— not just to the Board of Directors, but also to the Executive Director for his own professional development.

No matter your level of interaction with the Executive Director, your feedback on those interactions is very helpful and "I Don't Know" is always an option.

This survey is anonymous. In addition, our feedback is being collected by a third party agency and will be presented in summary form.

This survey will take approximately 10 minutes to complete. To protect respondent confidentiality the survey does not collect cookies, which means that once you enter the survey, you will need to complete all sections. If you do need to leave the survey before completing it, please feel free to start the evaluation from the beginning.

Again, we know you are very busy. We sincerely thank you taking the time to provide feedback that will help the GGRC Board of Directors evaluate the Executive Director's performance and allow for the Executive Director to improve his leadership skills.

Instructions

As you go through the survey, please use the following response options

- *Always* - the Executive Director (always) is very consistent in demonstrating this behavior
- *Mostly* - the Executive Director (most of the time) is fairly consistent in demonstrating this behavior
- *Some of the Time* - the Executive Director (sometimes) is not consistent in demonstrating this behavior
- *Does Not Demonstrate* - the Executive Director does not demonstrate this behavior
- *I Don't Know* - You do not feel you have enough information or do not feel able to comment or provide feedback on this particular behavior



1) Before we begin, can you please tell me which of the below best describes your primary relationship to GGRC?*

☐ Member of the Board of Directors (*non-operational*)

☐ MAC Team Member (*operational*)

☐ Member of GGRC Management Team (Manager/Supervisor) (*operational*)

☐ GGRC Staff Member (*operational*)

☐ Individual with Developmental Disability, Family Member, or Representative of people served (*non-operational*)

☐ Service Provider (*non-operational*)

☐ Community Member (SCDD, ARCA, DDS, Regional Center Director, Other) (*non-operational*)



Please note: The Following Survey Questions Pertain to Non-Operational (Board, People Served, Providers, Community Members, etc.);

Operational Stakeholders (Staff) respond to a Slightly Shorter Review (which can be found in a separate section)



Customer Service: Your interactions with the Executive Director.

In your interactions with the Executive Director, how often does he demonstrate the following characteristics?

How consistent is the Executive Director in this behavior?	Always	Mostly	Some of the Time	Does Not Demonstrate	I Don't Know
2. The Executive Director treats me with dignity and respect.					
3. The Executive Director respects my culture, ethnicity, disability, sexual orientation, and/or gender identity.					
4. The Executive Director listens to me and works to understand my perspective.					
5. The Executive Director is responsive – replying to telephone calls or emails.					
6. The Executive Director is knowledgeable.					
7. The Executive Director explains things in a way I can understand.					
8. The Executive Director, within his abilities, is helpful – providing answers, resources or suggestions.					
9. The Executive Director displays professionalism in his interactions with me.					
10. The Executive Director demonstrates a willingness to work collaboratively on projects.					

11) Is there anything else you would like the Executive Director to know?



Driving the Mission

How consistent is the Executive Director in this behavior?	Always	Mostly	Some of the Time	Does Not Demonstrate	I Don't Know
11. Helps create and communicate Golden Gate Regional Center's vision with real purpose in a way that makes sense and is inspiring.					
12. Thinks out of the box, generating new ideas and striving to be innovative in the supporting client outcomes and pushing for change within the regional center and broader system.					
13. Practices respectful, person-centered communication in all interactions.					
14. Works to create change that will increase community awareness and inclusion of people with developmental disabilities as thriving, contributing members of society.					
15. Works to promote the enhancement and self-direction of people's lives.					
16. Advocates and promotes cross cultural outreach, community and inclusion.					
17. Takes the time to understand the community's unique population, specific needs, and players; adjusts own style as needed to fit in and relate comfortably.					



How consistent is the Executive Director in this behavior?	Always	Mostly	Some of the Time	Does Not Demonstrate	I Don't Know
18. Serves as a connector and collaborator, seeking to understand and support the goals/ interests of others and link these to the goals/interests of GGRC.					
19. Communicates "big picture" state budget realities and how GGRC will be affected and what options are possible.					
20. Is well-versed in all areas of the business and ensures that the core business is strong (e.g., competent staff, effective teams, clear procedures and policies, appropriate resource allocation, etc.) while staying within policies and laws.					
21. Demonstrates respect to all individuals; listens to persons' requests, concerns or complaints, regardless of individual differences and unique backgrounds.					
22. Keeps GGRC Board Members up-to-date to avoid surprises, as it relates to their responsibilities.					

23) Driving the Mission: Is there anything else you would like the Executive Director to know about this trait?



2024 GGRC Executive Director Review Survey

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It's that time of year again! Time for the Board of Directors' required assessment of Golden Gate Regional Center's Executive Director Eric Zigman, and your time and insights are critical— not just to the Board of Directors, but also to the Executive Director for his own professional development.

No matter your level of interaction with the Executive Director, your feedback on those interactions is very helpful and "I Don't Know" is always an option.

This survey is anonymous. In addition, our feedback is being collected by a third party agency and will be presented in summary form.

This survey will take approximately 10 minutes to complete. To protect respondent confidentiality the survey does not collect cookies, which means that once you enter the survey, you will need to complete all sections. If you do need to leave the survey before completing it, please feel free to start the evaluation from the beginning.

Again, we know you are very busy. We sincerely thank you taking the time to provide feedback that will help the GGRC Board of Directors evaluate the Executive Director's performance and allow for the Executive Director to improve his leadership skills.

Instructions

As you go through the survey, please use the following response options

- *Always* - the Executive Director (always) is very consistent in demonstrating this behavior
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☐ Member of GGRC Management Team (Manager/Supervisor) (*operational*)

☐ GGRC Staff Member (*operational*)

☐ Individual with Developmental Disability, Family Member, or Representative of people served (*non-operational*)

☐ Service Provider (*non-operational*)

☐ Community Member (SCDD, ARCA, DDS, Regional Center Director, Other) (*non-operational*)



Please note: The Following Survey Questions Pertain to Operational / Internal Stakeholders (Staff);

Non-Operational Stakeholders respond to a Slightly Shorter Review (which can be found in a prior section) (These are programming notes only, participants see only metrics relevant to their perspective as driven by Q1.)



Customer Service: Your interactions with the Executive Director.

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7. The Executive Director explains things in a way I can understand.					
8. The Executive Director, within his abilities, is helpful – providing answers, resources or suggestions.					
9. The Executive Director displays professionalism in his interactions with me.					
10. The Executive Director demonstrates a willingness to work collaboratively on projects.					

A) Is there anything else you would like the Executive Director to know?



Driving the Mission

How consistent is the Executive Director in this behavior?	Always	Mostly	Some of the Time	Does Not Demonstrate	I Don't Know
11. Helps create and communicate Golden Gate Regional Center's vision with real purpose in a way that makes sense and is inspiring.					
12. Thinks out of the box, generating new ideas and striving to be innovative in the supporting client outcomes and pushing for change within the regional center and broader system.					
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17. Takes the time to understand the community's unique population, specific needs, and players; adjusts own style as needed to fit in and relate comfortably.					



How consistent is the Executive Director in this behavior?	Always	Mostly	Some of the Time	Does Not Demonstrate	I Don't Know
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19. Communicates "big picture" state budget realities and how GGRC will be affected and what options are possible.					
20. Is well-versed in all areas of the business and ensures that the core business is strong (e.g., competent staff, effective teams, clear procedures and policies, appropriate resource allocation, etc.) while staying within policies and laws.					
21. Demonstrates respect to all individuals; listens to persons' requests, concerns or complaints, regardless of individual differences and unique backgrounds.					
22. Keeps GGRC Board Members up-to-date to avoid surprises, as it relates to their responsibilities.					

B) Driving the Mission: Is there anything else you would like the Executive Director to know about this trait?



Strengthening the Agency Core

In your interactions with the Executive Director, how often does he demonstrate the following characteristics?

How consistent is the Executive Director in this behavior?	Always	Mostly	Some of the Time	Does Not Demonstrate	I Don't Know
23. Empowers staff to make changes in own area or work methods to make things more efficient, cost-effective, focused on the people we serve, etc.					
24. Involves employees at all levels of the Agency and across all functions when gathering input; asks questions and encourages brainstorming.					
25. Gathers information and makes decisions on internal organizational operations and broader system trends based on strategic planning and budgetary implications.					
26. Values team members; expresses positive expectations and speaks of staff in positive terms; shows respect for other team members' point of view, intelligence, and diverse contributions.					
27. Gives a detailed, understandable explanation of the goal and outcome to an individual or team (describes how it will be					



accomplished, when it will be finished, etc.).					
28. Holds project leaders accountable to defining work plans, persons responsible, resource needs, timelines and overall success of project and is available for questions and to help move projects forward.					
29. Encourages others to think in cross-boundary terms from the start of a project.					
30. Ties departmental goals and objectives to the Agency mission and internal values, and communicates this to employees.					

C) Strengthening the Agency Core: Is there anything else you would like the Executive Director to know about this trait?



Leadership

How consistent is the Executive Director in this behavior?	Always	Mostly	Some of the Time	Does Not Demonstrate	I Don't Know
31. Creates a committed, trusting management team that works together toward the best outcome for the Agency, not letting own agendas stand in way.					
32. Values and communicates that all levels of the organization impact on the lives of people served.					
33. Acknowledges the individual strengths and contributions of employees he/she regularly interacts with.					
34. Creates forums and establishes processes to share key information; sends relevant, timely updates to staff and community about issues that impact the Agency.					
35. Translates the mission into concrete specifics to enable staff to more fully understand the mission and their role in fulfilling it.					
36. Finds ways to make personal contact with all GGRC offices; has a visible presence throughout the Agency.					



How consistent is the Executive Director in this behavior?	Always	Mostly	Some of the Time	Does Not Demonstrate	I Don't Know
37. Facilitates discussions with the management team that allow for exchange of ideas, collaboration, and working together toward a collective outcome.					
38. Sees all functions, direct staff and employees as equals; operates without favoritism.					
39. Provides specific, frequent and positive recognition; creates an environment that is supportive and rewarding for the whole organization.					
40. Provides consistent, specific constructive feedback for employee development.					
41. Spends dedicated time, as needed, with direct reports (sits in on staff meetings, conducts working sessions together, etc.) and provides development opportunities for direct staff, based on identified areas of interest and/or areas to improve.					
42. Addresses performance issues of direct staff in a timely manner, including ensuring expectations and standards are clearly communicated and identifies a clear plan to address performance issues with direct staff.					



43. Anticipates long-term staffing needs and takes specific steps to ensure high potential talent is developed for future challenges.					
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D) Leadership Is there anything else you would like the Executive Director to know about this trait?

Thank You!



Feedback that fuels success.™

Improving Leader Effectiveness with 360 Feedback

A proposal discussion document for North Los Angeles County Regional Center

Prepared for:
North Los Angeles County Regional Center

Prepared by:
Dale Rose & Rachel Johnson

June 13, 2025



3D Group
2030 Addison St., Suite 650
Berkeley, CA 94704
www.3DGroup.net

360 Feedback Quote

3D Group specializes in full-service 360 Feedback and leadership development. For over two decades, we have delivered high-quality employee feedback and development services to organizations of all shapes and sizes. Our 360 Feedback assessment tools are well researched, our reports are user-friendly, and our service is exceptional. Our coaches cover ground beyond the typical "report debrief" during their one-on-one sessions. Our coaches help leaders establish development goals within the context of their report results, as well as organization goals and their career aspirations.

360 Feedback as a Catalyst for Change

At 3D Group, we believe 360 Feedback provides a unique and powerful opportunity to build leadership capability at the individual and organizational level. We excel at providing a way for employees to provide leaders with honest, constructive feedback. We treat employee feedback not a gift from employees, but rather as an investment employees make in their leaders. We excel at getting leaders to use that investment of feedback as fuel for leadership growth.

Why 3D Group? ...Expertise Delivered in Partnership.

We literally wrote the book on 360 Feedback. [The Handbook of Strategic 360 Feedback](#) (2019) illustrates the most current thinking in 360 Feedback today. While this edition speaks to best practice, our 2025 (8th Edition) [Current Practices in 360 Feedback](#), provides a comprehensive benchmarking study of common practices in 360 Feedback over the last 20 years. While we know what best practice looks like, we are disciplined about listening to client needs and tailoring every 360 Feedback process to be effective. process to be effective.

Our Understanding of North Los Angeles County Regional Center's Needs

North Los Angeles County Regional Center is looking for a partner to provide a 360 Feedback solution to support their Executive Director's annual evaluation with a growth and development component. They have asked for feedback that is honest and constructive via a survey (for broad coverage) and interview (for in-depth inquiry) methodology with coaching support to help guide interpretation and action planning. Additionally, the board seeks support with regard to interpreting the feedback as they integrate results into the Executive Director's annual evaluation.

Your Expert 360 Partner

- Serving clients globally since 1994
- 360 feedback thought leaders
- Robust technology
- Leadership & talent consulting

99% of our clients would work with us again

98% would recommend 3D Group to a colleague

3D GROUP

The infographic features a background collage of client logos including Abbott, Rambus, HANSON, LEGCO, Franklin Financial, FORT WORTH, Liberty Mutual, STANFORD, ALLERGAN, and IRVINE COMPANY. The statistics are presented in two orange circles.

Key Advantages of our Solution

1. **Honest Feedback Fuels Leader Development.** Most employees are naturally reluctant to speak truth to power, which leaves many leaders in the dark about how they can improve. Our 360 Feedback processes and protocols have been refined over 25 years to assure employees their survey responses are confidential so leaders can hear what employees really think. With our guidance and support, honest feedback from employees' fuels leadership development.
2. **Exceptional Project Management.** 3D Group minimizes headaches for our clients by providing fully supported 360 Feedback processes. Our project managers' expertise, flexibility, and responsiveness provide the support you need to assure success. This level of support has resulted in an average survey response rate of 85% across all 3D Group clients.
3. **Validated Instruments:** 3D Group's team of I/O Psychologists created the Leadership Navigator® for Executive Directors to be a reliable and valid measure of Executive Director behavior with input from the board, direct reports, and other stakeholders. The survey includes 72 numeric and two text-based responses covering Leading People and Task Leadership competencies. The report provides actionable feedback and highlights blind spots, strengths, and development areas.
4. **Stakeholder Interviews Dig Deeper:** 3D Group coaches conduct confidential interviews that expertly elicit specific leader behaviors that accelerate or impede a leader's success. While the source of individual responses will never be shared, the contextual detail shared in the words of the Executive Director's key stakeholders provide a rich and comprehensive view of the Executive Director's successes and struggles.
5. **Exceptional Feedback Coaches:** Our executive coaches excel at navigating the "palace intrigue" that often surrounds executives and board rooms. With expertise in helping leaders optimize their capabilities and sensitivity to governance dynamics, 3D Group coaches focus leaders on development and coordinate with the board chair to understand the feedback in the context of annual CEO/Executive Director Evaluations. 3D Group Coaches help the Executive Director accept and understand the data, create development goals and work with the board to communicate those goals. In addition to working directly with the Executive Director and board chair, we typically support the Governance Committee, Compensation Committee, or the Executive Committee.

Curious How it Works? Read about 3D Group's efforts to support CEO development in Forbes: [Why the Best Leaders of Midsized Firms Constantly Ask Their People "How Can I Improve?"](#)

Deliverables

Coach: Dale Rose, Ph.D.

Delivery Dates: Q3 2025

3D Group will conduct a 360 Feedback-based evaluation of the Executive Director for developmental purposes and to inform Executive Director's performance review. 3D Group will use an assessment approach that covers core executive competencies along with a specific focus on key competencies for Executive Director -successful leadership.

360 Feedback Survey

360 Feedback survey: 3D Group will administer either the Leadership Navigator® survey for Executive Directors or a Customized survey that is tailor-fit to the organization, the leader, and the purpose of the evaluation. The Leadership Navigator survey is designed to provide Executive Directors with tools to understand their role-specific strengths and weaknesses from the perspective of others, in support of a plan to improve; however, we are recommending a customized survey due to the unique nature of the organization and the role. Regardless of customization, the survey will be administered online with up to 35 raters including Board Chair, Board Members, Direct Reports, Others, and "Self".

Stakeholder Interviews

The 3D Group coach will interview up to 4 individuals who work closely with the Executive Director (typically direct reports, network partners, and possibly some board members) about their experience with the Executive Director. These will be 30-minute phone interviews targeted at identifying the Executive Director's strengths and development needs. The coach will rely on the Client's staff to schedule these calls (3D Group will provide a list of times the coach is available).

Full and Abbreviated 360 Feedback Reports

The resulting 360 Feedback results (online and interviews) will be integrated into a single report and delivered to the Executive Director, the Board Chair and identified members of the Board. Additionally, a second report only containing summary data from the online survey will be generated for distribution to board committees, as needed.

Debriefs with Executive Director, designated Board Committee, and Full Board

The 3D Group coach will first meet with the Executive Director to review the 360 Feedback report, identify development priorities, and formulate specific steps for development. Second, the coach will meet with the designated Board Committee to discuss and review the full 360 report and discuss more detailed results from the review in a confidential manner. Finally, the coach will meet with the whole board to discuss the abbreviated report and put the findings into context. These debriefs will be conducted by telephone/video.

Investment Summary

Deliverables & Activities	Fee
<ul style="list-style-type: none">▪ Board Orientation Meeting▪ 360 Feedback Survey Administration<ul style="list-style-type: none">○ Full Survey Report○ Abbreviated Survey Report▪ ED debrief and coaching (90-minute session)▪ Board Committee debrief (up to 90-minute session)▪ Full Board debrief (up to 90-minute session)	\$17,000
Additional Options	
<ul style="list-style-type: none">▪ Interviews with up to 4 individuals, summarized into a 2-to-4-page summary▪ Final Report: Interview summary attached to 360 survey report	\$3,500

<ul style="list-style-type: none">▪ Custom Survey creation: including content development, programming survey for online delivery, and report creation	\$5,900
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