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**Letter of Transmittal**

City of Hollywood  
City Hall/Office of Procurement Services  
2600 Hollywood Boulevard, Room 303  
Hollywood, Florida 33020

Re: Consulting Services for Strategic Planning, RFQ-4603-19-AP

To Whom It May Concern:

Turnkey Coaching Solutions has a team of consultants with experience in strategic planning and execution with proven and tested expertise working effectively in a collaborative framework with the public, citizen committees and associations, business and industry representatives, service clubs, non-profit organizations, school leaders, and City elected officials and staff. The solution we propose supports the strategic planning process including extensive and sustained internal and external involvement activities, to engage a broad and deep cross section of the community and city staff. Turnkey Coaching Solutions proposes a blend of coaching, team work facilitation and leadership development in support of the overall Strategic Planning initiatives that includes involvement and cooperative approaches that will engage community members that typically are not participants in civic or community dialogue.

TurnKey Coaching & Development Solutions, LLC (Herein referred to as the "RESPONDENT"), hereby submits its response to your Request for Qualification dated January 13, 2019, and agrees to perform in their proposal, if awarded the contract. The Respondent shall thereupon be contractually obligated to carry out its responsibilities respecting the services proposed.

Kindly advise this in writing on or before February 11, 2019 if you should deserve to accept this proposal.

Very truly yours,

Anisa Aven, CEO

TurnKey Coaching & Development Solutions, LLC





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## **Consulting Services for Strategic Planning Solicitation RFQ 4603-19-AP**

**Location:** City Hall/Office of Procurement Services  
2600 Hollywood Boulevard, Room 303 Hollywood, Florida 33020

**Due Date:** February 11, 2019, 3:00pm

**Prepared for:** Althea Pemsel  
Assistant Director  
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City of Hollywood, Florida January 13, 2019 Solicitation # **RFQ-4603-19-AP**

Overview	2
Background	2
Project Deliverables	3
Project Approach and Methodology	3
Objectives and Proposed Solution	3
Recommended Approach:	4
Program Design Approach	4
Adult Learning Retention and Our Customization Process	4
4 Phase Leadership Coaching	5
Assessments	6
Customized 360 Assessment Services	6
Group Training and Train the Trainer Options	7
E-Learning	8
QUALIFICATIONS/ELIGIBILITY	9
Summary of Proposer Qualifications, Experience and Capacity to Perform	10
Case Studies:	12
Coaching Focus Examples	13
RESPONDENT'S REFERENCE	16
Additional References	17
Client Testimonials	18
Our Coaches and Trainers	19
An example of our timeline and delivery:	35
ACKNOWLEDGMENT AND SIGNATURE PAGE	36

## **Overview**

Turnkey Coaching Solutions has a team of consultants with experience in strategic planning and execution with proven and tested expertise working effectively in a collaborative framework with the public, citizen committees and associations, business and industry representatives, service clubs, non-profit organizations, school leaders, and City elected officials and staff. The solution we propose supports the strategic planning process including extensive and sustained internal and external involvement activities, to engage a broad and deep cross section of the community and city staff. Turnkey Coaching Solutions proposes a blend of coaching, team work facilitation and leadership development in support of the overall Strategic Planning initiatives that includes involvement and cooperative approaches that will engage community members that typically are not participants in civic or community dialogue. Specifically, Turnkey Coaching Solutions proposes a partial solution that is included below in the Scope of Services, Background and Project Deliverables.

## **Scope of Services**

TKCS proposes to support the facilitation of "team building sessions for two groups: (1) the City Commission/CRA Board and (2) senior City/CRA staff. In addition to strengthening relationships, these sessions will result in identification of key goals and initiatives".

## **Background**

TKCS can provide expertise in facilitating the creation of the Vision and Mission Statements and the identification of the City's core values under the direction of the Project Management Team via methods described in the Objectives and Proposed Solutions Section below. "The City of Hollywood requires a Strategic Plan that includes a Vision and Mission Statement as well as identification of the City's core values".

## **Project Deliverables**

The TKCS team can support the following project deliverables.

- Prepare the Set of Core Values. A set of "core values" would be one of the intended outcomes of the Strategic Plan. This piece should include an accompanying narrative explaining its development and other relevant information that can serve to deepen understanding and create lasting value.
- Develop the vision and mission statements.
- Develop a Strategic Plan. The Plan shall contain overarching goals and subsequent objectives that will set a direction and general guidance for implementing priorities identified for the City as a whole and for every department and office. Each goal would have at least one action that supports the implementation of the goal. The accompanying Action Plan should be logically structured to include a description of the action, lead partner to champion the implementation effort, potential partners for implementation, timeframe and priorities for implementation and consideration of financial impacts to the City's budget. The final plan will consist of an online, live portal through which employees can update and community residents can access for information.

## **Project Approach and Methodology**

### **Objectives and Proposed Solution**

- **LEADERSHIP DEVELOPMENT:** TKCS is committed to providing leadership development to the employees and leaders of the City of Hollywood. Leadership practice includes but not limited to, effective communication, motivational skills, efficient decision-making process, and exercising accountability with self and others.
- **MANAGEMENT AND SUPERVISION TRAINING:** Provide Training strategies for adult learners including workshops, lectures, group discussions, case studies, skill practices, or other methods that enables all participants to understand how they each contribute to the health of the organization.
- **COACHING:** Offer Coaching services to middle, senior, and executive level staff for skills needed for effective team building, performance management, and organizational effectiveness.

### **Recommended Approach:**

● Customized "Hybrid" Training and Development Approach ● 4 Phase Leadership Coaching ● Assessments ● Group Training & Train the Trainer ● E-Learning

**Customized & Cohesive:** The right program will be customized yet cohesive across the City, and will be audience specific, considering various participant differences including: • Job focus (e.g., Office vs Production) - including skill-sets and needs • Culture/Language (e.g, English, Spanish, etc.) • Learning style (e.g., visual, physical, verbal, etc.)

### **Program Design Approach**

#### **Adult Learning Retention and Our Customization Process**

The included proposal is more than a training program, it's a development program, designed to fully employ the best-practices in adult learning theory for maximum retention, sustainable competency development and cultural change:

Customization Process TurnKey Coaching & Development Solutions has developed a hybrid solution - proven Coaching & Leadership competency instruction, combined with 360's or individual assessments and "company culture" research.

By building upon our trainer's off the shelf framework, our pre-launch customization process provides companies with a training and development solution that reflects their unique culture, policies and processes. To craft the content to be company specific, and depending upon the scope and budget, our customization process may include:

- Conduct pre-event interviews with key stakeholders
- Design a customized, anonymous survey
- Facilitate the survey results with input from senior leaders, supervisors, and an appropriate number of front-line specialists for a well-rounded view
- Provide an aggregate report of the survey results
- Integrate the findings into our Leadership curriculum, for a tailor-made learning program
- Conduct a coach and trainer team training to disseminate the pertinent findings for a more intimate coaching and training experience

#### **4 Phase Leadership Coaching**

##### **Our Coaching Process:**

Private and confidential one-on-one coaching provides a safe and positive support environment for an executive to explore development barriers and design productive strategies for overcoming limitations. A coach listens for what is really going on, promotes self-discovery, and offers candid, direct feedback that helps the participant tackle their most difficult issues. Our coaching engagement incorporates a simple four-step process that involves creating alignment and personal awareness, developing a plan, and implementing the plan with coaching support.

##### **Objectives Alignment & Coach Rapport.**

We launch the program with input from stakeholders, and initial rapport building calls with the coach/coachee and program manager(s). This process aims to build rapport, enthusiasm, and alignment for the program. It's during this phase that both the leaders and the TurnKey team are determining the program's objectives and whether or not the necessary factors for success are present.

##### **Awareness.**

This stage involves gathering accurate and relevant feedback information and delivering it to the client in such a way that the individual accepts and takes responsibility for improving. This first stage is the most important, because the individual's acceptance of "reality" will usually propel him or her to make changes.

##### **Planning.**

Once the development opportunities are identified, the coach works with the executive to create a development action plan. In general, most development plans consist of 70% on-the-job activities, 20% external training or coaching, and 10% individual study.

##### **Action.**

As the participant moves into the execution phase, the coach is able to discuss and debrief progress, sustain momentum, provide a sounding board, challenge their thinking, introduce additional creative ideas, give feedback, and even role play as needed.

### **Assessments**

Effective employee development begins with a needs assessment. This may include key-stakeholder interviews and/or customized surveys, or more typically we use one of our proven assessment instruments.

For individuals, assessment their competency, acumen, and soft-skills using proven employee and/or leadership assessment instruments, provides targeted learning plan.

For teams, our team assessment is a transformative process based on the international best-seller by Patrick Lencioni, The Five Dysfunctions of a Team. The program is called The Five Behaviors of a Cohesive Team.

### **Customized 360 Assessment Services**

#### **Organizational Objectives:**

- Retention and development of key talent in the organization
- Turning valued performers into more effective leaders
- Greater morale and higher productivity
- More committed and invested leaders
- Building a strong-bench of ready now leaders
- Leaders making significant and meaningful contributions to the fulfillment of the company mission and strategic goals

#### **Participant Objectives:**

- The inspiration and commitment to take action on vision, values, and the work that matters most.
- Clarity of signature leadership traits and unique contributions
- Understanding of how each is perceived by others
- Knowledge of those key behavioral changes that will have long-term value for their career and organization
- A customized strategy for improvement based on both personal and leadership development goals

#### **Specific Goals of a Customized 360° Assessment**

- The customized 360° should help the Company employees build more effective working relationships and improve performance based on an understanding of how their peers, supervisors, direct reports and others see their leadership and/or working behaviors.



- The 360° tool should help participants understand their personal strengths and gaps, as compared against the company identified competencies and values.
- The ultimate goal is to improve the overall quality of the workplace, increase employee engagement and retention and thus improve bottom line results

### **Group Training and Train the Trainer Options**

We would like to present to you 3 options for your consideration for Management and Supervision Training:

- A. Group Strategy Sessions
- B. Five Behaviors of a Cohesive Team
- C. Ala Carte Training
- D. Train the Trainer

TurnKey Coaching Solutions has developed a hybrid solution - proven leadership competency instruction, combined with 360's and individual assessments and "company culture" research. By building upon our trainer's off the shelf framework, our pre-launch customization process provides companies with a training and development solution that reflects their unique culture, policies and processes.

To craft the content to be company specific, we will:

- Conduct pre-event interviews with key stakeholders
- Design a customized, anonymous survey
- Facilitate the survey results with input from senior leaders, supervisors, and an appropriate number of front line specialists for a well-rounded view
- Provide an aggregate report of the survey results
- Integrate the findings into our Leadership curriculum, for a tailor-made learning program
- Conduct a coach and trainer team training to disseminate the pertinent findings for a more intimate coaching and training experience

### **Program Design**

Our programs are designed to fully employ the best-practices in adult learning theory for maximum retention.

One of the key concerns with traditional training and development programs is the ability to engage the audience and maximize the learning retention. Whenever possible, we customize each of our workshops and each component to fully employ the best-practices in adult learning theory for maximum retention, sustainable competency development and cultural change.

## **E-Learning**

Our internal team of training and curriculum design experts will work with your teams to customize programs by combining our off-the shelf curriculum, current internal models, multimedia items / curriculum, our established e-learning programs and in coordination with our Learning Management Software(or LMS) providers.

The LMS implementation process involves six major steps: Planning, LMS configuration, Systems integration, Course and data migration, User acceptance testing, and Go live.

Our experts work with you to prepare policies, procedures, guidelines, conventions, and criteria related to course properties and structures. Standards ensure that all administrators and stakeholders are using the LMS in a consistent and uniform way, which in turn improves its usability and manageability.

The breadth of our national network is made up of experienced and competent instructional designers possessing a wide variety of design and development capabilities in a variety of modalities. The following ADDIE based design and development steps are paramount to the TKCS instructional design process regardless of the learning modality:

- **Analysis:** Focus on the expected outcomes, based on the audience's prior skills, experience, expectations and needs, and design each course based on the available technology, budget and time
  - Identifying the course type
  - Determining subject suitability alternative modalities
  - Establishing the learning objective
  
- **Content Development:**
  - Collaborate with your organization and TKCS subject matter experts to develop content engaging the learner on both an emotional and cognitive level
  - Create content that can be used within the audience's professional field and immediately applied in the real world
  - Select the right instructional multimedia, and write effective copies, texts, audio and video scripts
  
- **Interactive Learning:**

- Incorporate a variety of methods for the learner to acquire and master the program content. Our courses include questions, simulations, games, quizzes to help the learner explore, understand and re-assess their knowledge
- **Intuitive User Interface**
  - Smooth, quick and easy to use buttons, pull downs and graphic displays enable users to quickly engage with the program content
  - Our courses are designed to be AICC and SCORM compliant
- **Measurement: We create effective and fair assessment methods that foster the learners' development by providing opportunities to demonstrate their mastery of the learning goals. We subscribe to the Kilpatrick 4 Levels of Measurement to assess the impact of the learning experience:**
  - **Reaction:** To what degree did the learners react favorably to the training Experience?
  - **Learning:** To what degree did the learners acquire the intended knowledge, skills, and attitudes as a result of the training
  - **Behavior:** To what degree did the learners apply what they learned back on the job? ○ **Results:** To what degree did the targeted outcomes occur as a result of the training experience and follow-up reinforcement
- **Program Evaluation We understand that today's learners demand the latest content and information. We deploy an evaluation process through peer reviews, pilot tests, usability tests and learner post training questionnaires to provide a steady stream of feedback enabling us to keep e-learning fresh and relevant.**

## **QUALIFICATIONS/ELIGIBILITY**

TKCS is specifically targeting the following qualifications as part of our proposal:

- A. Develop customized strategies that will be effective within the political and social environment of the City;
- C. Conduct team building session for the City Commission/CRA Board to gain consensus on the City's long term vision and goals for the Strategic Plan.
- D. Conduct team building session for senior management to identify goals, initiatives and performance measures for each department and office.
- G Develop and manage the process to achieve outcomes perceived as balanced and

authentic by as many stakeholders as possible.

### **Summary of Proposer Qualifications, Experience and Capacity to Perform**

TurnKey was founded on the belief that efficient, high-quality, low cost coaching and training solutions are needed and that quality oversight, centralized coordination, meaningful feedback, and quantifiable results is imperative. We believe that today more than ever.

Since 2004, we have been building our team for the very purpose of providing single-source leadership and development solutions for large scale programs.

The TurnKey Coaching & Development team includes 1000+ executive coaches, expert corporate trainers and OD consultants currently under contract as well as an additional 2942 in our greater network of "on-call" experts.

The team has decades of senior level business leadership experience in addition to years of coaching and training experience, extensive training, and serious credentials. Many have:

- Advanced degrees (PhD, MBA, MS, MA)
- 5000+ hours of OD Consulting and Training
- 20+ years of business experience
- Former corporate executives
- Receive 100+ hours of HR Development CEU's each year

Our programs have been successfully delivered and validated with major Fortune 200 companies. Based on years of experience and an excellent track record, we are highly confident in our ability to support your comprehensive coaching needs at several levels.

## Partial Client List

Our executive team and coaches have worked with hundreds of executives, managers, and high-potential employees from a wide range of major corporations worldwide:

- ┆ AAA
- ┆ alliantgroup
- ┆ American Access Care
- ┆ Costco Wholesale
- ┆ Charming Charlie
- ┆ Cenikor
- ┆ Crane Payment Innovations
- ┆ Crescent Point Energy
- ┆ KidsPeace
- ┆ KDV Law (Kaufman, Dolowich, & Voluck, LLP)
- ┆ International Certification Services
- ┆ Ind. Comm. Bankers Assoc.
- ┆ Microsoft Licensing
- ┆ Newmont Mining Corporation
- ┆ Orange Theory Fitness
- ┆ Pfizer
- ┆ RiceTec
- ┆ Rolls-Royce, N.A.
- ┆ Southern California Edison
- ┆ SoHo House Group
- ┆ TenCate Advanced Composites
- ┆ Toll Brothers
- ┆ Welch Allyn
- ┆ Xerox Business Services
- ┆ And more...



Allowing TurnKey to be your Leadership & Employee Training & Coaching Program Provider produces several important benefits that are simply included as part of your program:

- Our business has been organized to handle both the needs of a large corporation and the smaller enterprise. We value individual coaching and training engagements as well as enterprise-wide, coaching and leadership development initiatives. Thus, we have ample professional coaches and trainers that will never be taxed by the coaching requirements of more participants. To this end, we limit the number of participants assigned to any one coach.

- With our worldwide network of professional trainers and coaches, we use a proprietary matching system that is unlike any other in the coaching industry. We are able to take into consideration not only the objectives of your program but the specific requests of your individual coachees. In our experience, having the ability to find a coach that meets the specific needs of a coachee is optimal for the overall success of the program.

- Most coaching providers do all the training, coaching and managing of the program themselves, thus they are unable to objectively solicit feedback and respond appropriately to the overall vision of the program, let alone adapt and/or change experts or coaching methodologies as needed. We have designed our program to have an objective lead coach available to gather feedback from participants and ensure satisfaction. We believe this additional supervision is an important ingredient to ensuring the program's success.

- We have sophisticated systems and well documented processes that ensure proper internal controls and efficient management of the entire process, from start to finish.

- Our executives are veteran, credentialed coaches and trainers with extensive business experience to bring to all our leadership development contracts and engagements.

#### **Our Services Include:**

- Level & budget appropriate Coaching Programs including executive, mid-level, global leadership, HiPos, and Performance Improvement programs
- Training Programs: 400+ topics
- High-Potential Development Programs: Including Comprehensive Leadership University and Succession Planning components
- Assessments: Psychometric Assessments, 360 feedback (qualitative and quantitative) and Hiring Assessments
- Engagement, HR & Culture Surveys
- Strategic Planning: data-driven strategic analysis and planning programs
- Organizational Development Consulting Services
- Capstone Projects ala Shark Tank Business Acumen Programs

#### **Case Studies:**

- Leadership University for 47 Directors / 10 Executives (Agricultural Science) included mission, vision, values facilitation, Sr. Leader as Coach Training, level-appropriate foundational leadership/managerial training plus 1:1 and group/team coaching and psychometric and 360° assessments. Results included improved communications and conflict management, decrease in "silos" and territorial behavior, improved impact and influence (across organizational units), and the cultivation of a common vision and strategy. Overall 63% increased effectiveness per supervisor benchmark reports.

- Leadership coaching for cross-organizational leadership team (public utility co.) integrating internal training programs/assessments with 1:1 coaching and professional development; results included greater engagement, managerial courage, leadership effectiveness, and decreased turnover.

- Innovation coaching for 15 leaders (aerospace / industrial composite industry) included series of three, team-alignment workshops, 1:1 development plan coaching and "innovation project" group coaching; results reported by team included increased tolerance for risk-taking, and solution experimentation, a healthy willingness to fail in order to succeed, greater confidence in identifying high-risk vs. reward, increased competency in quality decision making, and a positive progress /execution of their vision.

- 1:1 coaching program for entire organization integrated with a succession planning initiative (Software Co.); included level appropriate training/coaching and online modules; employees applied to participate and were awarded based on merit and managerial recommendations; results included an overall positive cultural shift, improved retention and engagement, healthy competition for "next-level" assignments and overall improved leadership competency including communications, interpersonal awareness, emotional intelligence, managing and measuring work, etc.

- CFO of a \$200MM (commercial construction) received executive coaching for impact and influence, motivating and inspiring others, and peer-relationship influence; results included 95% improvement in 360 feedback, job-satisfaction, strategic engagement and leadership effectiveness.

- A director (engine components/ marine propulsion / nuclear industry) received performance coaching for interpersonal awareness, building effective teams and defensiveness; results included reinstatement of leadership role and promotion (6 mos.), improved team morale and significantly improved relations and the ability to get work done through others.

#### **Coaching Focus Examples**

- Senior Leader with final responsibility for a major business line (information technology) received coaching as he developed and managed global sales team and grew the business volume from \$50 million per year to \$2 billion. Coaching focus: expanding visibility in the larger organization, developing his leadership team, and managing the political environment.

- VP (now COO) (online marketing company); coaching focus: developing greater executive presence, scaling systems and solutions for fast growth, establish greater alignment within the leadership team.

- VP of Finance (IT) received coaching in anticipation of going public. Coaching focus: work-life effectiveness, giving performance feedback, and communicating more effectively with the leadership team

- Senior Director of Supply Chain and then Global Service, (medical technology manufacturing): Coaching focus: expanded participation with the leadership team, developing a more refined vision for career development, and strategies for managing global projects and teams.

#### **Contract or Project Number: Pfizer Phases 1, 2 & 3**

**Full Project Title:** Collaborative Leadership Program Phase 2 & 3

#### **Project Description:**

- Phase 1: DISC Workplace Assessments and Training

- Phase 2: Group Coaching / Shadow Coaching - 1:1 Coaching – Executive and/or Individual Development Feedback and Planning
- Phase 3: Progress Report & Accountability Facilitation (1/2 Day session plus re-assessment, in 6 month intervals).

**Project Customer:** Pfizer, Inc.

**Project Contact Name, Phone and Email Address:** Vanessa Bowman, Director, Site Operations Management PGS Andover, 978-247-1604, Vanessa.Bowman@Pfizer.com

**Initial Contract Schedule:** Phase 1: April, 2016 Phase 2 & 3: Ongoing

**Final Contract Duration:** Phase 1: Completed April, 2016 Phases 2 & 3: Spring, 2017

(a) Was the project completed on time per the contract end date? Phase 1: yes Phase 2&3: projected yes

**Initial Contract Award Amount:** \$55,800

**Final Contract Amount:** Pending Completion and Scope Increase

**Contract or Project Number: RiceTec 2 Phase Leadership Program (Q1)**

**Full Project Title:** 3 Phase Leadership Development Program

**Project Description:**

- Phase 1: Training + Individual Development Planning Mini-Coaching (Class 3)
- Phase 2: Two Trainers for the 2-Day training
- Phase 3: 360's plus debrief
- Strategic Planning
- Advanced Leadership + Action Learning + Dev. Plan Grp. Coaching
- 5 Behaviors of a Cohesive Team™ Facilitation

**Project Customer:** RiceTec

**Project Contact Name, Phone and Email Address:**

Oswaldo Lopez, GVP,

Mike Gumina, CEO, 281-212-5165, mgumina@ricetec.com

Victor Castellanos, HR Manager, 281-756-3415, vastellanos@ricetec.com

**Initial Contract Schedule:** March 2016

**Final Contract Duration:** Ongoing

(a) Was the project completed on time per the contract end date? yes

**Initial Contract Award Amount:** \$185,574.50

**Final Contract Amount:** \$153,949.50

**Contract or Project Number: Southern California Edison: Emerging Leaders Coaching Program**

**Full Project Title:** Emerging Leaders Coaching Program

**Project Description:**



- Supporting the leaders with trusted and supportive professional coach
- Ensuring confidentiality and safe environment for the leaders to grow
- Focusing upon "on the job" and "within the project" assignments to minimize work overload and distractions
- An accountability structure that ensures maximum ROI and if needed, course-correction
- A coordinated training and coaching approach

**Project Customer:** Southern California Edison

**Project Contact Name, Phone and Email Address:** John Mulholland, 626-302-3456,

John.Mulholland@sce.com

**Initial Contract Schedule:** November 8, 2013

**Final Contract Duration:** Ongoing

**(a) Was the project completed on time per the contract end date?** Ongoing with a projected yes

**Initial Contract Award Amount:** \$170,258.95

**Final Contract Amount:** \$170,258.95

**Contract or Project Number:** AAA Minneapolis Leadership Development Program

**Full Project Title:** Leadership Development Program

**Project Description:**

- Phase 1: Strengths Based Mini-Coaching Program.
- Phase 2: Strengths Based Leadership Training.
- Phase 3: Group Coaching / Shared-Intelligence Sessions.

**Project Customer:** AAA Minneapolis

**Project Contact Name, Phone and Email Address:** Shelly Werden, HR Manager, 952-927-2628

Swerden@AAAMinneapolis.com

**Initial Contract Schedule:** December 2015

**Final Contract Duration:** Ongoing

**(a) Was the project completed on time per the contract end date?** Projected Yes

**Initial Contract Award Amount:** \$59,690

**Final Contract Amount:** \$59,690

## RESPONDENT'S REFERENCE

**Toll Brothers, Inc.**

Programs and Learning and Development Services:

TurnKey is the single source executive coaching provider for multiple units across the US including three active engagements in: Philadelphia PA, Reno NV, Orange county CA, and Raleigh NC.

Provide coaching, training and assessment services as their human resource development provider

Jon Downs  
SVP Human Resources  
jdowns@tollbrothersinc.com  
215-938-8035

### **Costco**

Programs and Learning and Development Services:

Costco has over 170,000 employees nationwide. TurnKey provides Learning and Development services including coaching and training to leaders at various warehouse engagements across the US. Engagements include: Seattle WA, San Diego CA and San Francisco CA

Brenda Weber  
Human Resources  
Bweber@Costco.com  
425-313-6095

### **RiceTec:**

Programs and Learning and Development Services:

Since 2014, TurnKey has been providing multi-tier learning and development programs as Rice Tec's primary HR Development partner. The programs are custom designed to meet the specific level of each leader and include mission vision and value workshops for senior leaders, strategic planning, facilitated team development programs, senior leader as coach training, executive coaching, high-potential development for succession planning including: comprehensive training, coaching, group coaching, project competitions etc.

Talent Insights plus IDP (Individual Development Planning), 30 participants Vice Presidents plus Mid-level Managers

Advanced Leadership Training (360 Feedback, plus coaching, plus two full day training sessions, and group coaching): 30 Vice Presidents and Mid-level managers

Victor Castellanos  
VP, Human Resources  
281-685-2697  
VCastellanos@RiceTec.com

Oswaldo Lopez  
EVP Global HR  
281-212-5162  
olopez@ricetec.com

**Southern California Edison:** Largest electric utility in the world - has multi-tiered coaching and leadership development programs. TurnKey is one of SCE's primary coaching vendors for 16,000 employees.

Jeffrey Thrift  
Principal Manager – Leadership Development  
626-302-0030  
Jeffrey.thrift@sce.com

Additional References

Dave Reeder  
Colt Concrete & Asphalt  
[dave.reeder@coltconcrete.com](mailto:dave.reeder@coltconcrete.com)  
972-484-2858  
Dallas, TX

Naomi Hertz  
CHECKMARX  
[naomi.hertz@checkmarx.com](mailto:naomi.hertz@checkmarx.com)  
646-352-3208  
Skokie, IL with a second location in Dallas, Tx

Kendall Hoyd  
Residential Design Services  
[khoyd@resdesign.com](mailto:khoyd@resdesign.com)  
281-900-4181  
Anaheim, CA

Patricia Collins  
Pinellas Suncoast Transit Authority  
[pcollins@psta.net](mailto:pcollins@psta.net)  
727-540-1855  
St. Petersburg, FL

## Client Testimonials

## Our Coaches and Trainers

We would like to recommend interviewing a few of our highly qualified leadership experts.



**The selected coaches and/or trainers will become familiar with your' values, culture, and corporate mission in preparation for the engagement. Our executive coaches and trainers are seasoned, professionals with relevant business and leadership development experience. We take great pride in the quality and credentials of our team.**

**\*Please Project Personnel for description of assignments and responsibilities, resumes and bios an estimation of time devoted to this project and other pertinent information.**

**Charlene, MA, PCC  
Fort Lauderdale, FL**



Charlene is a Certified Professional Coach of high potential individuals, small business owners, and key personnel who want to maximize their growth. Her coaching process is focused on maximizing proficiency and achieving goals. She believes that leveraging individual experience, strengths, interests, and ingenuity are essential to business and personal growth.

Charlene earned a Bachelor's of Science in Psychology from Arizona State University and a Master's degree in psychology with an emphasis on organizational leadership from the Chicago School of Professional Psychology. She received her professional coaching training from the University of Miami. She is a Certified Professional Coach and accredited by the International Coach Federation as an Associate Certified Coach. She is also certified to administer MBTI personality assessments and is a certified Florida Supreme Court Family Mediator.

Taking initiative, clarifying objectives, championing great work ethic, and persevering towards excellence are Charlene's academic and career strengths. She excels in dealing with challenging and demanding situations, such as resolving personnel conflicts, and removing obstacles to achieve professional goals. She passionately believes in cultivating corporate cultural identity, and is experienced with navigating in today's multi-faceted and diverse workforce.

Charlene's professional path has been a lifelong search to achieve balance in career and personal fulfillment. Her positive and enthusiastic outlook is inspirational. It gives her joy to connect with people on their journeys toward personal and professional greatness.

### **Charlene's Resume**

Driven in assisting individuals achieve excellence through conversations of self-discovery from a logical practice that leads to self-empowerment, positive relationships, and commitment to continued progress. Focused and enthusiastic about achieving clients' goals by supporting clients to fulfill commitments, build confidence, and bring a compelling vision to life. Devoted to connecting with people to help them achieve their greatness.

**Core competencies include:** Goal Oriented | Results Driven | Self-starter | Personnel Assessor | Cultural Awareness | Communication skills | Personal & Professional

Development | One-on-one Support | Emotional/Social Intelligence Development | Action Learning | Positive Psychology | Leadership Development | Self-leadership

## **PROFESSIONAL EXPERIENCE**

**Habitat for Leadership: 2013 – Present | Self-leadership Coach | Fort Lauderdale, FL**

My chief focus is building strong partnering relationships with entrepreneurs and professionals in an inspiring and creative process to achieve personal and professional fulfillment. I provide an ongoing partnership to help produce fulfilling results. My mission is to build effective and sustainable skills and influence positive change in core areas of life: work, personal, and community.

**Habitat for Leadership: 2011 – 2013 | Consultant | Fort Lauderdale, FL**

Consulted small business owners on business growth, resolve human resource conflicts, assisted in shaping professional mission. Provided programs for both personal and professional development. Provided personality assessments and assisted in analyzing the results for real life application.

**JW Marriott Desert Ridge Resort & Spa: 2003 – 2013 | LMT – Certified New Hire Trainer | Phoenix, AZ**

Facilitated a New Hire 90-day onboarding process through four stages of training and development: Training, Reinforcing, Encouraging and Empowering. Systematically introduced New Hire to associates, managers, and facility to ease integration and bearing. Generated new protocols for spa treatments and trained associates to meet the highest and consistent quality service standards. Consistently provided and maintained the legendary customer service that Marriott is known for.

**Arizona TreeWorks: 1991 – 2000 | Business co-owner – HR Manager | Phoenix, AZ**

Began with the first year earning of \$500 weekly gross to \$10,000 weekly gross. Sold for \$500,000 in 2002. Managed day-to-day HR needs including hiring, staff training, payroll, and staff needs. Acted as a bookkeeper to maintain accounts receivable, payables, and bookkeeping records. Managed clientele's needs and complaints.

## EDUCATION

Master of Arts | Psychology: Leadership Development | Chicago School of Professional Psychology

Bachelor of Arts -- Magna Cum Laude | Psychology, Minor in Sociology | Arizona State University

Online courses from top universities | Learning How to Learn | Better Leader, Richer Life | Coursera

---

## CERTIFICATIONS

Florida Supreme Court Certified Family Mediator | Florida Dispute Resolution Center Court appointed to help resolve familial conflicts between disputing parties.

Professional Certified Coach | International Coaching Federation  
With an ICF Credential, coaches demonstrate not only knowledge and skill, but also a commitment to high professional standards and a strong code of ethics.

Certified Professional Coach | University of Miami

The Certified Professional Coach Program is a 140 hour, eleven-month rigorous program

Myers Briggs Type Indicator | CPP



**Able to implement MBTI, Strong Interest Inventory, Thomas Kilman Conflict Mode Instrument (TKI), Fundamental Interpersonal Relations Orientation (FIRO) Business Reports, California Psychological Inventory (CPI), and more.**



**Clare, PCC, MBA  
Hollywood, FL**

Clare's degrees in psychology and business administration along with her extensive experience in management, leadership and information technology informs her Business and Leadership Coaching practice. She gained wide-ranging experience in finance and not-for-profit healthcare in St. Louis, and technology consulting for the United Nations in Italy at the Food and Agriculture Organization and the World Food Programme. Most recently Clare coached teams and leaders at the Office for the Coordination of Humanitarian Affairs (OCHA) in New York and Geneva, Switzerland. In addition, she is currently a Pro Bono coach for the Humanitarian Coach Network working with high potential professionals at the United Nations.

Clare believes that everyone has the self-knowledge to become more fulfilled and productive. All one needs is a catalyst; a coach to empower them to attain their goals. Her keen interest in leadership brought her to coaching in 2011. She guides clients to greater success in their careers and personal lives using a structured set of workshops, exercises and homework.

Clients are fast tracked toward self-awareness utilizing state-of-the-art Leadership, and Emotional Intelligence assessments. Innovation and organizational growth are facilitated via Game-Based workshops that encourage entrepreneurial thinking. Clients learn how Conversational Intelligence, a practice founded on neuroscience, illustrates how language can have a transformational impact on our ability to connect and navigate our work and personal relationships. In coaching, being able to sustain one's growth is the key to success therefore she works with each client to create their own best practice toolkit.

Clare lives in the Miami/Fort Lauderdale area with her loyal husband Tim and their wonder dog, Alfie Rodriguez.

"I've been working with Clare for about a year and I'm repeatedly impressed by the ease with which she slides into my life, asking a simple question that turns on all the lightbulbs in my mind, she awakens my best self, so I'm motivated to hop right over any obstacles to accomplish my goals. Thank you Clare!" ~ Jo, Client

# CLARE

## PROFESSIONALLY CERTIFIED EXECUTIVE LEADERSHIP COACH

Challenge leaders to attain their optimal career and life goals utilizing assessments and gamified learning. Wide ranging experience in the Humanitarian Sector, Government, Hospitality, Healthcare, Legal and Travel Industries.

Extensive Corporate Information Technology background in not-for-profit Healthcare and Humanitarian sectors, and Commercial real estate.

- Certified in Emotional Intelligence EQ 2.0, Energy Leadership Index Master. Conversational Intelligence (C-IQ) Enhanced Practitioner, Entrepreneurial Thinking thru Gamification Workshop Facilitator, Mentor Coach, President ICF South Florida 2017, winner of 2017 Chapter Achievement Award.
- Committed to continuous learning with a penchant for building connections and community. Passionate about coaching and giving back through Pro Bono work with the Humanitarian Coaching network [www.thehcn.org](http://www.thehcn.org) and reducing the use of plastics and our carbon footprint through support of [www.4ocean.org](http://www.4ocean.org).
- Owner of Merlo Coaching since 2011

## SIGNATURE STRENGTHS

Executive Coaching | Leadership Development | Career Exploration | Entrepreneurial Thinking

## PROFESSIONAL EXPERIENCE

### EXECUTIVE, LEADERSHIP & ENTREPRENEUR DEVELOPMENT COACH (2010 – Present)

Actively engage managers and leaders to identify and explore their personal and business goals; empowering them to identify and seek opportunities via coaching and multi-dimensional gamed-based thinking to develop tactical plans that achieve extraordinary, life and business-changing results. "Changing the way you play at Life" guided by Emotional Intelligence, Energy Leadership, and Conversational Intelligence. ICF Mentor Coach.

- Digital Services Process Coach and Consultant for Office of Humanitarian Affairs OCHA (2015 – 2016)
- Coach, facilitator and Project Manager New York and Geneva, Switzerland
- Office of Personnel Management, Leadership coach to Development Program's 2019 cohort
- Sensitivity Coaching and Training to high profile executives, company confidential
- Executive Coach at Turnkey Coaching Solutions

### BUSINESS SOLUTIONS CONSULTANT – Miami and Miami Beach, FL (2012 – Present)

Outsourced Managed Service Provider research, assessment and selection for SPOC, single point of contact solutions. Client focused formulation of vendor deliverables, metrics and Key Performance Indicators (KPI). Process focus to identify improvement opportunities, and streamlining initiatives.

**LNR PROPERTY, LLC - Miami Beach, FL (2001 – 2011)**

Diversified real estate investment, finance, management and Real Estate Development Company

***Director of Business Solutions and Analysis (2007 – 2011)***

- Led Cross Functional Teams aligning technical resources with the business to provide timely solutions and metrics which simplified decision making and resource allocation by executive management
- Sought out highly functional, but cost effective internal and external software solutions: Spearheaded process redesign which reduced the use of paper by > 2MM sheets during the first year, ~240 trees, projected ~ 5MM in paper related savings over five years; system-wide effort to eliminate Styrofoam and plastic utensils in the workplace
- Attracted and retained qualified and capable staff from 3 to 22 to support dynamic needs of complex and evolving organization; improved delivery time of software solutions
- Piloted adoption of Agile System Development Life Cycle Methodology to speed up software delivery cycles, and actively engage product owners through use of self-managed development teams

***Manager / Senior Manager / Associate Director (2001 – 2006)***

**IMAGINEERING PRODUCTIONS, Miami, FL (2000)**

Search Engine Optimization (SEO), Web Marketing, Interactive media, and Video specialists

***Technical Consultant and Marketing Representative:*** Developed Multi-media presentations and e-Books

**WORLD FOOD PROGRAMME (WFP), Rome, Italy (1999 – 2000)**

World's largest humanitarian agency fighting hunger

***Consultant to WFP Information Management and Personnel Divisions***

- Managed system-wide Records Management application at WFP. Workflow analysis, requirements definition, RFP development, result analysis, software specifications and pilot implementation, imaging and web-accessible solution. Led and supported multi-cultural development / user workgroup and shared hands-on management experience with international vendors' team.

**FOOD AND AGRICULTURE ORGANIZATION (FAO), Rome, Italy (1997 – 1999)**

FAO's mandate is to raise levels of nutrition, improve agricultural productivity, better the lives of rural populations and contribute to the growth of the world economy

***User Communications Officer to the Oracle Financials System Implementation***

- Developed and implemented User Communications and Consultation Strategy including: Intranet site design, coding and content development, briefing documents, presentations, manuals for dissemination of information to HQ, Regional Offices and Field Staff

***Information Technology Officer for the Sustainable Development Department of FAO***

- Strategic Planning, Internet/Intranet content development, platform standards, and Help Desk

**EDUCATION and CERTIFICATIONS**

**Masters Business Administration (MBA), Washington University, St. Louis, Missouri**

**Bachelor of Arts (BA) - Psychology, emphasis Computer Science, Washington University, St. Louis, Missouri**

**Professional Certified Coach (PCC)**

**ICF Mentor Coach International Coach Federation**

**Certified Professional Coach (CPC), Energy Leadership Index, Master Practitioner (ELI MP), Institute for Professional Excellence in Coaching (IPEC)**

**Emotional Intelligence, EQI 2.0 Certification**

**Conversational Intelligence (C-IQ) Enhanced Practitioner, Certification 7/2019**

**Agile Development Methodology Training**

**Certified FreshBiz Facilitator, "Changing the way you play at life" through Gamification**

**VOLUNTEER**

**International Coach Federation of SOUTH FLORIDA, *President of the Board 2017*, active since 2014.**

***2017 Chapter Achievement Award***

**The Humanitarian Coaching Network targeting high potentials @ United Nations Coach 2014 – present**

**Toastmasters, VP of Membership**



**Mark, PhD, MA, NCC, ACS  
Orlando, FL**



Mark is a senior organizational development and training expert. His work in the area of performance improvement includes team development, change management, infrastructure implementation, organizational training and development for middle management, and executive leadership. As an executive coach he has extensive experience with a wide variety of corporate and not for profit clients. Mark designs custom curricula for leadership programs and corporate training experiences.

Mark works as a leadership and training consultant for Saint Helena Hospital, The Northern California Network, Florida Hospital Kissimmee, Florida Hospital Foundation, Florida Hospital Institute for Lifestyle Medicine, Florida Hospital for Children, Celebration Health, Healthy 100, Sloan-Kettering, Rollins College, The University of Central Florida, Stetson University, Valencia College, Seminole State College, Florida Technical University, Crummer Graduate School, The Edith Bush Institute for Philanthropy and Non-Profit Leadership, Management and Executive Education, Corporate University, Morton, Plant, and Mease, Channel 13, Olive Garden, Darden, Vineyard 29, Ruth's Chris, Tupperware, VTMAE- aircraft maintenance, Noblegen- a manufacturing firm in Canada, and a variety of other for profit and not for profit organizations mainly in Florida and California. Most of Mark's clients use his expertise in training and development to create custom training programs for leaders. Mark has taught classes for twenty years at the undergraduate and graduate level.

He is trained in conflict mediation and offers a myriad of seminars and workshops designed to enhance organizational development and performance excellence. Mark primarily works at the senior leadership and middle management level of the organizations he serves. References from the list above are available upon request.

*"Mark is an amazing person and a superb counselor. He knows when to take the obstacles of life seriously and when to add humor and perspective to lighten the load. His rapport with clients is generally instant and long lasting. He combines the tools of intellect with the compassion of heart to guide his clients towards positive change. I would recommend Mark without hesitation. He is truly one of the areas best counselors." ~ Molly, Counsellor*

**DR. MARK FREEMAN**

#### **PROFILE**

Individual & Organizational Development Consultant

Over twenty years of behavioral consulting and organizational development / working with executive teams and managers to achieve tangible enterprise results / publishing papers,

facilitating group sessions and providing individuals with coaching and/or therapy to achieve personal goals

- Focuses on performance improvement and fundraising consulting, resulting in an aggregate of over one hundred million dollars in capital campaign revenue
- Performs organizational training to enhance both executive and team performance in the areas of revenue generation and operational streamlining to create direct bottom line savings
- Coaches hundreds of professionals and managers in a wide variety of industries ranging from healthcare administration to nonprofits on all aspects of long-term strategies and plans for executing objectives
- Facilitates ten to twenty retreats per year for boards and executive management teams
- Serves as senior human resources consultant for Rollins College and leadership coach for many MBA students and executives per year

### **EXPERIENCE**

**Freeman & Associates, LLC – Winter Park, FL 2007 – Present**

Increase organizational performance and cash flow through collaboration with clients to create solutions, break down barriers to performance, define strategic drivers, build and cross-train teams, design and implement dashboard-style results tracking and coaching all levels of employees as necessary.

Serves as a senior organizational development and behavioral consultant with professionals and executives primarily within the academic and healthcare industry clients regarding organizational growth and leadership strategies through seminars and individual counseling engagements; retained as leadership coach to Crummer School of Business Students while acting as lead facilitator for Rollins College's Philanthropy Center.

- Designs and executes performance improvement strategies that include fundraising consulting, organizational training, management development, business development, and executive leadership coaching for one of the largest national hospital enterprises: Florida Hospital and Saint Helena Hospital Region in California; develops programs for management and facilitates annual strategic sessions with multiple executives from each hospital
- Provides conflict mediation and offer dynamic seminars and workshops designed to enhance organizational development and performance excellence; works primarily at the senior and middle management levels of organizations

**Sample Clients:** Florida Hospital Foundation, Florida Hospital Institute for Lifestyle Medicine, Florida Hospital Kissimmee, St. Helena Hospital Region, Florida Hospital NICU, Summit Wealth Management, Inc., Ruth's Chris Hospitality Group, Inc., Darden, Inc., Olive Garden, Management and Executive Education, Central Florida Channel Thirteen, Rollins College Crummer Graduate School of Business, Rollins College Human Resources Department, Rollins College Philanthropy and Non-Profit Leadership Center, Stetson University, Florida Institute for Technology, University of Central Florida, Public Allies, Quest, Inc., Maitland Art and History Museums

Director of Personal Counseling and Psychological Services – Rollins College, Winter Park, FL

**1994 – 2008**

Demonstrated superior performance as program creator, manager and executer as Director of Counseling and Psychological Services at Rollins College; conducted clinical supervision and served on the Dean of Student Affairs leadership team

- Created and directed counseling program for Rollins College serving three thousand students each year.
- Promoted from counseling responsibilities by the executive leadership team at Rollins to design and conduct leadership development programs and internal organizational/behavioral interventions for the entire campus based upon extensive work with various departments on campus
- Published over fifty nationally acclaimed articles, newsletters, presentations and professional papers in the counseling field, with organizational excellence, change management, personal and professional development for leaders, and team building as current research interests

**Positions:**

Adjunct Faculty 1992 - 2011

Rollins College, Winter Park, Florida

Stetson University, Deland, Florida

University of Central Florida, Orlando, Florida

Counseling Clinic Coordinator 2000 - 2001

University of Central Florida, Orlando, Florida

Mental Health Counselor/Consultant 1986 - 1998

Florida Hospital, Orlando, Florida

Personal Counselor 1985 - 1994

Rollins College, Winter Park, Florida

**AWARDS**

Outstanding Leadership Award, American College Counseling Association (2006); Outstanding Contribution to Professional Knowledge in College Counseling (2006); Dissertation of the Year Award, College of Education UCF (2004); Outstanding Counseling Supervisor Award (2000)

**EDUCATION & DEVELOPMENT**

University of Central Florida – Doctor of Philosophy in Counselor Education and Supervision

Stetson University – Master of Science in Mental Health Counseling

Beacon College – Master of Arts in Counseling

Rollins College – Bachelor of Arts in Behavioral Science

**CERTIFICATIONS & LICENSES**

Licensed Marriage and Family Therapist # 1953

Licensed Florida Mental Health Counselor # 2649

National Certified Counselor # 27915

Approved Clinical Supervisor, ACS



Certified EMDR Level 1 & 2 Clinician  
Trained Mediator- Conflict Resolution  
Certified Clinical Hypnosis  
Certified Myers-Briggs Trainer  
State of Florida Approved Clinical Supervisor

**PROFESSIONAL ORGANIZATIONS AND ACTIVITIES**

Past President, American College Counseling Association  
Member, Association for Counselor Education and Supervision  
Member, Southern Association for Counselor Education and Supervision  
Member, American College Counseling Association  
Past Conference Chair, American College Counselors Association  
Member, American Association of University and College Counseling Center Directors  
Member, Association for Spiritual, Ethical, and Religious Values in Counseling  
Member, Counseling Association for Humanistic Education and Development  
Member, Association for Psychological Type  
Past Secretary, Association for Psychological Type Regional Board  
Past Coordinator, Local Chapter Association for Psychological Type



**Victor, M.S.M, C.P.C.  
Davie, FL**

Victor's passion is for you to lead, serve and impact the world for the greatest good. For over 22 years he has used his strategic skills to assimilate personal and organizational purposes, resulting in profound transformation and empowerment of human potential. His creative leadership experience in strategic planning, team building, program development, and fund development has resulted in over \$100MM raised.

Victor's faith guides his commitment to advancing your purpose. He integrates his experience in customer focus, product development, process improvement and financial skills to help you assess and re-align your resources to "aim smart" in your plan of action and profitability.

Victor generously offers his lessons learned and best practices from his successes in leadership roles in Forbes top 50 public and private sector organizations such as Prudential, The Salvation Army, and Cross International. He has received high recognition from these organizations as well as Cross International. He is also honored to have served as the Executive Director for The American Veterans' Disabled for Life Memorial to raise \$65MM to erect this national monument at our nation's capital to honor the exceptional sacrifices of our disabled veterans.

Victor holds a Master's Degree in Public Management, a Bachelor's Degree in Finance and is a Certified Professional Coach. He serves on the board of the Association of Fundraising Professionals (AFP), Fort Lauderdale/Broward County Chapter, and previously served on the board of the Miami-Dade Planned Giving Council. He also chaired the FEMA Emergency Food and Shelter Program of Miami-Dade County and was Sub-Committee Chair for the Broward County's Ten-Year Plan to End Homelessness.

*"Victor is an exceptional leader in his field and develops those who work with him to be leaders also. His integrity and quiet strength is an inspiration to all those who have the pleasure to work with him." ~ June*

*\*Please note that a full resume is available for Michele upon request*



**Dr. Mario, PhD, PCC  
Miami, FL**

Dr. Mario is an International Coaching Federation Professional Certified Coach; Board Certified Coach; Attorney & counselor at law; conference speaker and trainer. He is a United States Army Captain (retired), served in various positions to include: aviation commander, recruiter, and acquisition research and development, and project manager with experience and oversight, during his tenure in Aviation Program Management of billion dollars' defense contracts. Dr. Mario has been serving in the Miami area since 1999. His professional efforts focus on assisting corporate executive officers; business owners; physicians, attorneys, and teams to productively identify, understand and address the issues that are influencing or shaping their lives, families, and/or business/profession. In that regard, Dr. Mario is most professionally fulfilled when he is helping others resolve sensitive, complex, and important "people-related" issues, resulting in abundant living.

In the entrepreneurship environment, business start-ups, strategic planning, team building and planning, creative thinking, and conflict resolution are Dr. Mario's areas of expertise. Mario has consulted with and/or provided coaching, and accelerated learning programs to over one hundred small to large organizations, teams, governmental entities, professional and trade associations, as well as community health organizations in 56 countries in both English and Spanish. He has facilitated leadership teams, boards and community groups to design a futuristic vision; to create action events and/or annual milestones; to understand and accept transformation; to open interlocation and resolve conflict; and to improve communication via communication intelligence frameworks and neurostrategies to foster teamwork. As a coach of "actor interlocation" Dr. Mario regularly assists diverse teams to broaden their worldview on issues of great significance, and rewrite their narratives in order to meet clearly framed individual and organizational outcomes.

*\*Please note that a full resume is available for Michele upon request*



**Michele, PCC  
Miami, FL**

Michele is a highly credentialed speaker, consultant and coach. Michele works with growth-oriented company executives who want to identify and solve workplace challenges. She uses proven strategies and systems to help them gain clarity about the right people and processes. With the courage to change, leaders can finally achieve the success they have been looking for.

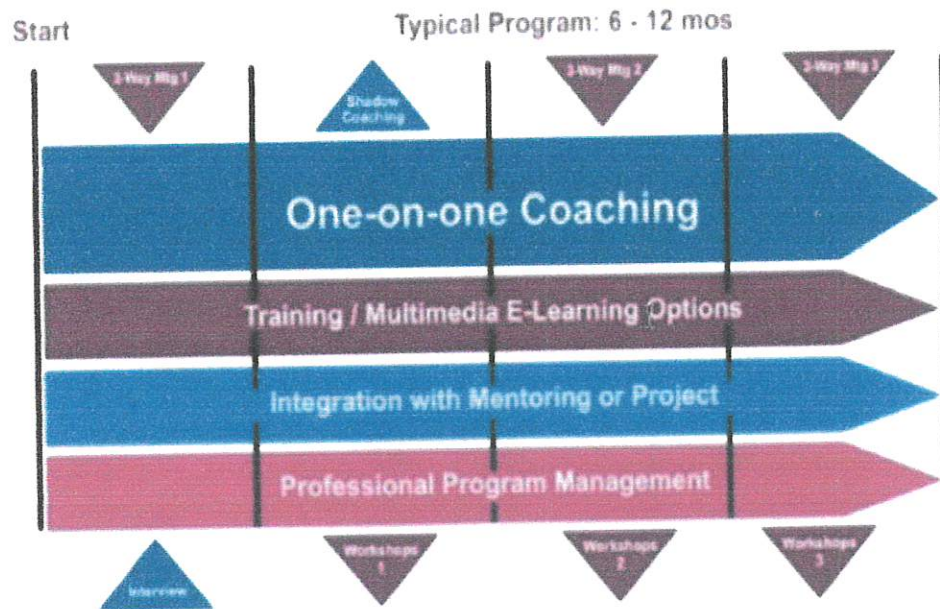
Michele is a Professional Certified Coach (PCC) from the International Coach Federation and has coached over 400 individual clients. She was certified by the Institute for Professional Excellence in Coaching. She is also certified in Emotional Intelligence, Team Coaching International Team Diagnostic Assessment, DISC, Energy Leadership Index (ELI-MP), Situational Leadership and as a SHRM-SCP.

Michele has worked with companies such as Xerox, Bridgestone, MGM and The Horton Group.

*"Michele's coaching is backed by extensive training and vast experience with individuals, small groups, and corporations. Her work is both personal and professional, providing us with the means to increase both our productivity and our satisfaction in our work." ~ Elizabeth, Consultant*

*\*Please note that a full resume is available for Michele upon request*

## An example of our timeline and delivery:



Assessments EQ Competencies Benchmarking 360's

Confidential | Quality Assurance

Guaranteed Coach-Client Satisfaction | Metrics and Monthly Reports

281-469-4244

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



### Case Studies:

- Leadership coaching for cross-organizational leadership team (public utility co.) integrating internal training programs/assessments with 1:1 coaching and professional development; results included greater engagement, managerial courage, leadership effectiveness, and decreased turnover. - Innovation coaching for 15 leaders (aerospace / industrial composite industry) included series of three, team-alignment workshops, 1:1 development plan coaching and innovation project & group coaching; results reported by team included increased tolerance for risk-taking, and solution experimentation, a healthy willingness to fail in order to

succeed, greater confidence in identifying high-risk vs. reward, increased competency in quality decision making, and a positive progress /execution of their vision.

- Leadership University for 47 Directors / 10 Executives (Agricultural Science) included mission, vision, values facilitation, Sr. Leader as Coach Training, level-appropriate foundational leadership/managerial training plus 1:1 and group/team coaching and psychometric and 360° assessments. Results included improved communications and conflict management, decrease "silos" and territorial behavior, improved impact and influence (across organizational units), and the cultivation of a common vision and strategy. Overall 63% increased effectiveness per supervisor benchmark reports.

- 1:1 coaching program for entire organization integrated with a succession planning initiative (Software Co.); included level appropriate training/coaching and online modules; employees applied to participate and were awarded based on merit and managerial recommendations; results included an overall positive cultural shift, improved retention and engagement, healthy competition for "next-level" assignments and overall improved leadership competency including communications, interpersonal awareness, emotional intelligence, managing and measuring work, etc.

- CFO of a \$200MM (commercial construction) received executive coaching for impact and influence, motivating and inspiring others, and peer-relationship influence; results included 95% improvement in 360 feedback, job-satisfaction, strategic engagement and leadership effectiveness.

- A director (engine components/ marine propulsion / nuclear industry) received performance coaching for interpersonal awareness, building effective teams and defensiveness; results included reinstatement of leadership role and promotion (6 mos.), improved team morale and significantly improved relations and the ability to get work done through others.

## ACKNOWLEDGMENT AND SIGNATURE PAGE





# ACKNOWLEDGMENT AND SIGNATURE PAGE

This form must be completed and submitted by the date and the time of bid opening.

Legal Company Name (include d/b/a if applicable): Turnkey Coaching & Development Solutions, LLC DBA TurnKey Coaching Solutions

Federal Tax Identification Number: 462608246

If Corporation - Date Incorporated/Organized: 2004

State Incorporated/Organized: Texas

Company Operating Address: 12514 Millway Drive, Houston, Texas 77070

Remittance Address (if different from ordering address): \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Company Contact Person: Anisa Aven

Email Address: Anisa@TurnKeyCoachingSolutions.com

Phone Number (include area code): 281-469-4244 Fax Number (include area code): 281-580-6254

Company's Internet Web Address: https://turnkeycoachingsolutions.com/

IT IS HEREBY CERTIFIED AND AFFIRMED THAT THE BIDDER/PROPOSER CERTIFIES ACCEPTANCE OF THE TERMS, CONDITIONS, SPECIFICATIONS, ATTACHMENTS AND ANY ADDENDA. THE BIDDER/PROPOSER SHALL ACCEPT ANY AWARDS MADE AS A RESULT OF THIS SOLICITATION. BIDDER/PROPOSER FURTHER AGREES THAT PRICES QUOTED WILL REMAIN FIXED FOR THE PERIOD OF TIME STATED IN THE SOLICITATION.

 \_\_\_\_\_ 2-11-19

Bidder/Proposer's Authorized Representative's Signature: Date

Type or Print Name: Anisa Aven, CEO

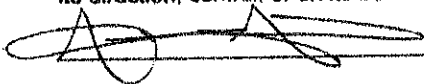
THE EXECUTION OF THIS FORM CONSTITUTES THE UNEQUIVOCAL OFFER OF BIDDER/PROPOSER TO BE BOUND BY THE TERMS OF ITS PROPOSAL. FAILURE TO SIGN THIS SOLICITATION WHERE INDICATED BY AN AUTHORIZED REPRESENTATIVE SHALL RENDER THE BID/PROPOSAL NON-RESPONSIVE. THE CITY MAY, HOWEVER, IN ITS SOLE DISCRETION, ACCEPT ANY BID/PROPOSAL THAT INCLUDES AN EXECUTED DOCUMENT WHICH UNEQUIVOCALLY BINDS THE BIDDER/PROPOSER TO THE TERMS OF ITS OFFER. ANY EXCEPTION, CHANGES OR ALTERATIONS TO THE GENERAL TERMS AND CONDITIONS, HOLD HARMLESS/INDEMNITY DOCUMENT OR OTHER REQUIRED FORMS MAY RESULT IN THE BID/PROPOSAL BE DEEMED NON-RESPONSIVE AND DISQUALIFIED FROM THE AWARD PROCESS.



# HOLD HARMLESS AND INDEMNITY CLAUSE

(Company Name and Authorized Representative's Name)

the contractor, shall indemnify, defend and hold harmless the City of Hollywood, its elected and appointed officials, employees and agents for any and all suits, actions, legal or administrative proceedings, claims, damage, liabilities, interest, attorney's fees, costs of any kind whether arising prior to the start of activities or following the completion or acceptance and in any manner directly or indirectly caused, occasioned or contributed to in whole or in part by reason of any act, error or omission, fault or negligence whether active or passive by the contractor, or anyone acting under its direction, control, or on its behalf in connection with or incident to its performance of the contract.



Anisa Aven


SIGNATURE PRINTED NAME

Turnkey Coaching & Development Solutions

COMPANY OF NAME/DATE

2-11-19

# NON-COLLUSION AFFIDAVIT

- 1 STATE OF: Texas
- 2 COUNTY OF: Harris being first duly sworn, deposes and says that:
- 3 (1) He/she is CEO of Turnkey Coaching Development Solutions, LLC, the Bidder that has
- 4 submitted the attached Bid. (2) He/she has been fully informed regarding the preparation and contents of the attached Bid and
- 5 of all pertinent circumstances regarding such Bid; (3) Such Bid is genuine and is not a collusion or sham Bid;
- 6 (4) Neither the said Bidder nor any of its officers, partners, owners, agents, representatives, employees or
- 7 parties in interest, including this affiant has in any way colluded, conspired, connived or agreed, directly
- 8 or indirectly with any other Bidder, firm or person to submit a collusive or sham Bid in connection with
- 9 the contractor for which the attached Bid has been submitted or to refrain from bidding in connection
- 10 with such contract, or has in any manner, directly or indirectly, sought by agreement or collusion or
- 11 communication or conference with any other Bidder, firm or person to fix the price or prices, profit or cost
- 12 element of the Bid price or the Bid price of any other Bidder, or to secure an advantage against the City
- 13 of Hollywood or any person interested in the proposed Contract; and (5) The price or prices quoted in the attached Bid are fair
- 14 and proper and are not tainted by any collusion,
- 15 conspiracy, connivance or unlawful agreement on the part of the Bidder or any of its agents,
- 16 representatives, owners, employees, or parties in interest, including this affiant.
- 17 (SIGNED)  2-11-19

# SECTION 287.133 (3) (a) FLORIDA STATUTES ON PUBLIC ENTITY CRIMES

## SWORN STATEMENT PURSUANT TO SECTION 287.133 (3) (a) FLORIDA STATUTES ON PUBLIC ENTITY CRIMES

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS

1. This form statement is submitted to City of Hollywood, Florida  
by Anisa Aven, CEO for Turkey Coaching Solutions (Print individual's name and title) (Print name of entity submitting sworn statement) whose business address is 12514 Millway Dr. Houston Tx 77070 and if applicable its Federal Employer Identification Number (FEIN) is 46-2108246 If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement.

2. I understand that "public entity crime," as defined in paragraph 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any bid, proposal, reply, or contract for goods or services, any lease for real property, or any contract for the construction or repair of a public building or public work, involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misinterpretation.

3. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1)(b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in an federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.

4. I understand that "Affiliate," as defined in paragraph 287.133(1)(a), Florida Statutes, means:

1. A predecessor or successor of a person convicted of a public entity crime, or 2. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

5 I understand that "person," as defined in Paragraph 287.133(1)(e), Florida Statutes, means any natural person or any entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

6. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. (Please indicate which statement applies.)

Neither the entity submitting sworn statement, nor any of its officers, director, executives, partners,

shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

~~The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.~~

The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime, but the Final Order entered by the Hearing Officer in a subsequent proceeding before a Hearing Officer of the State of the State of Florida, Division of Administrative Hearings, determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list. (attach a copy of the Final Order).

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THAT PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017 FLORIDA STATUTES FOR A CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

(Signature)

Sworn to and subscribed before me this 11 day of February, 2019

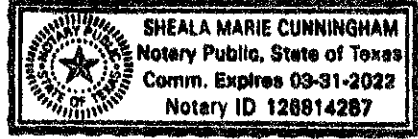
Personally known as Anisa Aven

Or produced identification \_\_\_\_\_ Notary Public, State of Texas

County of Harris my commission expires 3-31-2022 (Type of identification)

Sheala Marie Cunningham

(Printed, typed or stamped commissioned name of notary public)



**Failure to sign or changes to this page shall render your bid non-responsive.  
CERTIFICATIONS REGARDING DEBARMENT, SUSPENSION AND OTHER  
RESPONSIBILITY MATTERS**

The applicant certifies that it and its principals:

- (a) Are not presently debarred, suspended, proposed for debarment, declared ineligible, sentenced to a denial of Federal benefits by a State or Federal court, or voluntarily excluded from covered transactions by any Federal department or agency;
- (b) Have not within a three-year period preceding this application been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction, violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
- (c) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph (b) of this certification; and
- (d) Have not within a three-year period preceding this application had one or more public transactions (Federal, State, or local) terminated for cause or default.

Applicant Name and Address: Turnkey Coaching & Development Solutions, LLC 12574 Millway Dr

Application Number and/or Project Name: Consulting Services for Strategic Planning RFP Houston Tx 77076

Applicant IRS/Vendor Number: 46-2608216 4603-19-AP

Type/Print Name and Title of Authorized Representative: Anisa Aven, CEO

Signature: \_\_\_\_\_ Date: 2-11-19

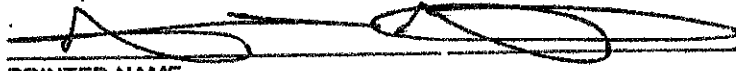
Failure to sign or changes to this page shall render your bid non-responsive.

## DRUG-FREE WORKPLACE PROGRAM

IDENTICAL TIE BIDS - Preference shall be given to businesses with drug-free workplace programs. Whenever two or more bids which are equal with respect to price, quality, and service are received by the State or by any political subdivision for the procurement of commodities or contractual services, a bid received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. Established procedures for processing tie bids will be followed if none of the tied vendors have a drug-free workplace program. In order to have a drug-free workplace program, a business shall:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition. 2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations. 3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1). 4. In the statement specified in subsection (1), notify the employee that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction. 5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program (if such is available in the employee's community) by, any employee who is so convicted. 6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of these requirements.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements

  
VENDOR'S SIGNATURE  
PRINTED NAME Anisa Aven NAME OF COMPANY Turnkey Coaching & Development Solutions LLC  
2-11-19

## SOLICITATION, GIVING, AND ACCEPTANCE OF GIFTS POLICY

Florida Statute 112.313 prohibits the solicitation or acceptance of Gifts. - "No Public officer, employee of an agency, local government attorney, or candidate for nomination or election shall solicit or accept anything of value to the recipient, including a gift, loan, reward, promise of future employment, favor, or service, based upon any understanding that the vote, official action, or judgment of the public officer, employee, local government attorney, or candidate would be influenced thereby." The term "public officer" includes "any person elected or appointed to hold office in any agency, including any person serving on an advisory body."

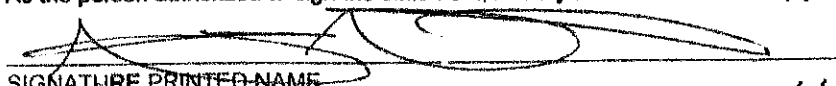
The City of Hollywood policy prohibits all public officers, elected or appointed, all employees, and their families from accepting any gifts of any value, either directly or indirectly, from any contractor, vendor, consultant, or business with whom the City does business.

The State of Florida definition of "gifts" includes the following:

Real property or its use. Tangible or intangible personal property, or its use. A preferential rate or terms on a debt, loan, goods, or services, Forgiveness of indebtedness, Transportation, lodging, or parking, Food or beverage, Membership dues, Entrance fees, admission fees, or tickets to events, performances, or facilities, Plants, flowers or floral arrangements Services provided by persons pursuant to a professional license or certificate. Other personal services for which a fee is normally charged by the person providing the services. Any other similar service or thing having an attributable value not already provided for in this section.

Any contractor, vendor, consultant, or business found to have given a gift to a public officer or employee, or his/her family, will be subject to dismissal or revocation of contract.

As the person authorized to sign the statement, I certify that this firm will comply fully with this policy.



SIGNATURE PRINTED-NAME  
Anisa Aren

2-11-19

## REFERENCE QUESTIONNAIRE

It is the responsibility of the contractor/vendor to provide a minimum of three (3) similar type references using this form and to provide this information with your submission. Failure to do so may result in the rejection of your submission.

Giving reference for: \_\_\_\_\_  
Firm giving Reference: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Fax: \_\_\_\_\_  
Email: \_\_\_\_\_

*Please see attached References*



January 18, 2019

From the desk of Brenda Weber  
Costco Wholesale  
VP, Human Resources

To whom it may concern,

It is with great pleasure that I write this letter of recommendation for TurnKey Coaching & Development Solutions. In 2012, our EAP introduced us to TurnKey for an executive coaching engagement. That was the start of a reliable partnership and we have utilized their coaching services for a number of our General Managers and leaders since.

Their one-on-one coaching programs have yielded positive, behavior changes and the participants and their supervisors have been pleased with the experience. Those who have engaged fully in the coaching programs have shown improvement in a variety of competency areas, such as communicating more effectively, motivating and managing others, improving their leadership style, emotional intelligence, perspective, self-awareness and greater demonstration of our company values, such as acting with honor and character.

As our leaders span the US, we have worked with a handful of TurnKey's executive coaches over the years. Being able to make a single call and be confident that the coaching model and the coach team will be qualified and capable, is a tremendous value. Their systems for managing confidentiality, high-quality teams of coaches, and sufficient transparency and oversight, makes our employee development responsibilities easier and our goals more achievable.

Without hesitation, I highly recommend TurnKey Coaching & Development Solutions. I am confident in saying selecting TurnKey Coaching Solutions as your coaching or employee development provider will bring value to your organizational development goals.

A handwritten signature in black ink, which appears to read "Brenda Weber". The signature is fluid and cursive.

Brenda Weber  
Costco Wholesale  
VP, Human Resources  
P: 425.313.6095



From the desk of:

Danny Stowers

Human Resources  
RiceTec, Inc

To Whom it may Concern:

I am Danny Stowers and I am a Human Resources Business Partner for RiceTec, Inc in Alvin, Texas. We are a seed company producing hybrid rice seed for the American and various international markets.

We have partnered with TurnKey Coaching & Development Solutions for a variety of our employee development needs including executive and leadership coaching and training, and I am happy to provide my unequivocal endorsement for their company.

Our first engagement with Turnkey was in 2014, and since then TurnKey has been providing multi-tier learning and development programs to multiple areas of our organization. These programs have been custom designed to meet the scope and objectives of our Executives, Directors, Managers, our highly educated team of scientists, our front-line employees and our unique organizational goals.

TurnKey has delivered:

- Pre and post-engagement assessments including psychometric assessments and 360 feedback assessments
- Executive coaching to approximately 30 of our middle-managers / senior executives
- Mission, Vision and Values facilitation for senior leaders
- Facilitated team development programs (The Five Behaviors of the Cohesive Team)
- Senior Leader as Coach training
- Designed and delivered our high-potential program including three training phases and a business acumen course with capstone projects and presentations.
- ABC's of Supervising Others training in Puerto Rico and the US



Confidentiality, non-disclosure and privacy are essential elements of an effective coaching program and TurnKey has shown sincere commitment to high ethical and professional standards.

The feedback from employees has been positive and we've seen meaningful and measurable improvements, especially for those who have engaged in the one-on-one coaching programs.

I can also confirm that TurnKey's procedures for program management and engagement reports ensure each participant receives the attention and care they deserve. Their program management and OD consulting services have been very helpful and have made the development partnership competent, flexible, and painless at the same time.

I would recommend TurnKey Coaching & Development Solutions to any organization.

Very Sincerely and Respectfully,

A handwritten signature in cursive script that reads "Danny Stowers".

Danny Stowers, PHR, SHRM-CP

HR Business Partner

RiceTec, Inc

[dstowers@ricetec.com](mailto:dstowers@ricetec.com)

281-756-3302



4900 E. Hunter Ave.  
Anaheim, CA  
92807

From the desk of  
Kendall Hoyd  
President  
Residential Design Services

To Whom It Concerns:

As the president for Residential Design Services (RDS), I have direct experience working with Anisa Aven and the team at TurnKey Coaching & Development Solutions. I have been working with TurnKey since March 2014 when I engaged the firm. I worked at another firm at the time and brought the services and relationships with me to RDS.

TurnKey has supported our employee development goals with a handful of diverse programs including 360 feedback and psychometric assessments, one-on-one coaching, and a performance management training program.

Our leaders have expressed positive feedback about their experience and as their supervisor, I have personally witnessed improvements in the areas of strategic foresight, interpersonal and communication effectiveness, emotional intelligence, conflict resolution, critical thinking, and other important leadership competencies.

Their systems for maintaining privacy and managing the engagements are uniform and highly professional. TurnKey is committed to professionalism and excellence in coaching and our employees. There is never a question if they have a safe place to speak openly, as confidentiality is maintained throughout every program.

I have also worked with Anisa Aven as my personal executive coach. Anisa's abilities are truly exceptional. She is very perceptive, extremely smart and has comprehensive knowledge of the subject matter that pertains to her field. I recommend her without reservation. She is really good at what she does, and I have benefited greatly from the time I have spent working with her.

I strongly recommend Anisa and TurnKey Coaching & Development Solutions to any organization who may be considering employee development.

Sincerely,  
  
Kendall Hoyd  
President  
Residential Design Services  
[khoyd@resdesign.com](mailto:khoyd@resdesign.com)  
281-900-4181



January 16, 2019

To Whom it Concerns:

I have had the pleasure of working with TurnKey Coaching and Development Solutions since 2016 for PSTA's leadership development, coaching, and 360 assessment needs. We have launched three cohorts of participants with TurnKey, comprising approximately 35% of our management staff, and expect to engage with them again in 2019.

Our leaders who have received coaching with TurnKey's Executive Coach, Dr. Mark Freeman, have consistently said that the experience has been extremely valuable and had led to positive outcomes.

Each participant selected the focus of the coaching, based on 360 feedback, to include a variety of competency development options including goal setting, professional communication, interpersonal effectiveness, executive presence, strategic thinking, conflict resolution, improving team collaboration, and more.

Our PSTA team and participants are satisfied that confidentiality and privacy has been maintained throughout the entire executive coaching experience. This has been a key element leading to meaningful coaching relationships.

I can attest to the fact that TurnKey's systems and procedures for program management, status reporting and ensuring each participant is satisfied, has made the experience professional, uncomplicated, and valuable.

I would strongly recommend Dr. Mark Freeman and TurnKey Coaching & Development Solutions to any organization who may be considering employee development.

Sincerely,

A handwritten signature in black ink, appearing to read "Trish Collins", is written over a light blue horizontal line.

Trish Collins  
Director of Human Resources  
Pinellas Suncoast Transit Authority (PSTA)  
[pcollins@psta.net](mailto:pcollins@psta.net)  
727-540-1855

**Pinellas Suncoast Transit Authority**

3201 Scherer Drive, St. Petersburg, FL 33716 • Phone: 727-540-1800 • InfoLine: 727-540-1900 • [www.PSTA.net](http://www.PSTA.net)

